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Welcome to IGeLU 2022

Cardiff, Wales – 14 September 2022



Work Orders Demystified

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Outline

- Introduction
- What Is a Work Order?
- Why Are Work Orders Confusing?
- Examples of Work Orders
- Best Practices
- Alternatives to Work Orders
- Q & A

Self Introduction

- Kristen Fredericksen
- University Collaborative Systems Librarian
- Office of Library Services (OLS)
- The City University of New York (CUNY)
 - 11 senior colleges
 - 7 community colleges
 - 7 graduate, honors and professional schools
 - 243,389 students



The City University of New York



Baruch
COLLEGE



BRONX
COMMUNITY
COLLEGE

Brooklyn
College

The City College
of New York

College of
Staten Island

CRAIG NEWMARK GRADUATE
SCHOOL OF JOURNALISM

THE
GRADUATE
CENTER
CITY UNIVERSITY
OF NEW YORK

CUNY
SPH
GRADUATE SCHOOL OF
PUBLIC HEALTH & HEALTH POLICY

CUNY SCHOOL
OF LABOR AND
URBAN STUDIES

CUNY SCHOOL OF LAW

CUNY School of
Professional Studies

GUTTMAN
COMMUNITY COLLEGE

Hostos
Community College

HUNTER
The City University of New York

JOHN
JAY
COLLEGE OF
CRIMINAL
JUSTICE

KINGSBOROUGH
COMMUNITY COLLEGE

LaGuardia
Community College

LEHMAN
COLLEGE

MACAULAY
HONORS COLLEGE

MEDGAR EVERS
COLLEGE

NEW YORK CITY
COLLEGE OF
TECHNOLOGY

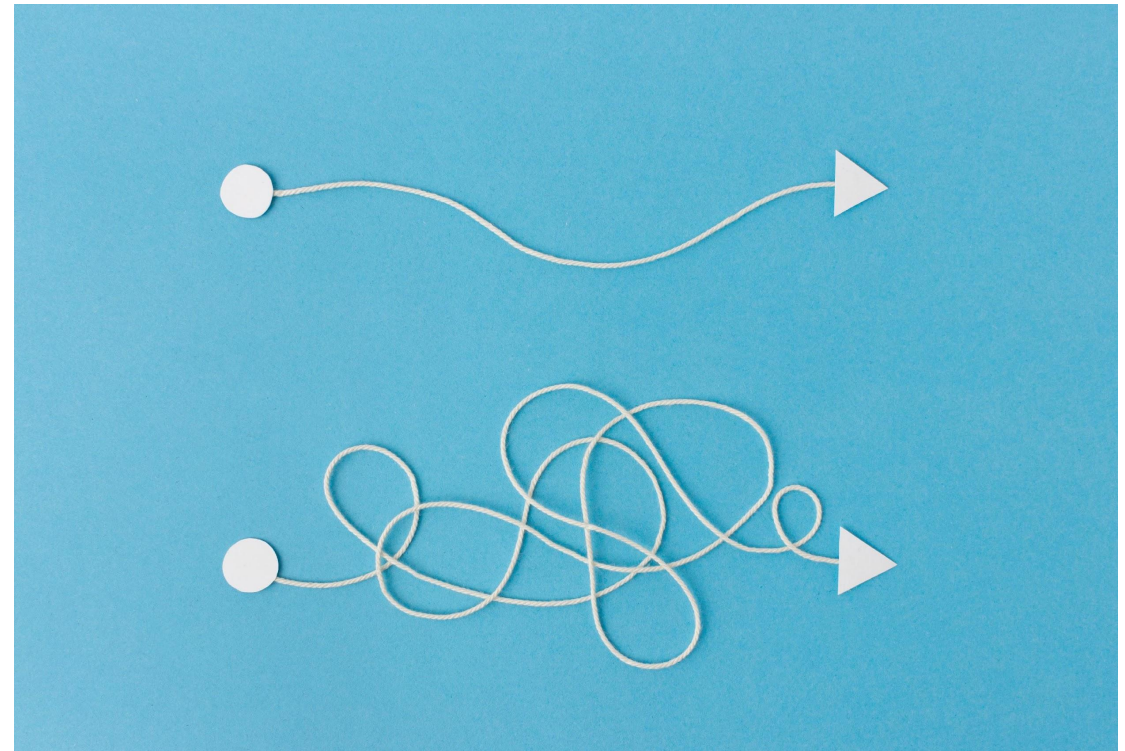
QUEENS
COLLEGE

QUEENSBOROUGH
COMMUNITY COLLEGE

YORK College

What Is a Work Order?

- Tracking workflows
 - Who?
 - What?
 - Where?
 - When?
- Assign a process to one or more items
 - If needed, assign steps within the process



What Is a Work Order?

Definitions from Other Libraries

“Work orders are a flexible tool that allow you to monitor the processing of physical items in your library.”

- California State University, [Work Orders Narrative](#)

“We can think of Work Orders like transit systems in a city: an item enters the path of a work order, moves from station to station along the line until all of the processes are done, then goes back to its home library or on to another destination.”

- Harvard University, [Work Orders Overview](#)

What Is a Work Order?

Advantages

- Staff can see that item is being cataloged, physically processed, etc.
- Item is “In process” in Primo VE
- Item is requestable by patrons, but they won’t get it until work order is complete
- Statistics on how long each step takes



What Is a Work Order?

Disadvantages

- Unfamiliar to staff
- Less useful in smaller libraries



Why Are Work Orders Confusing?

1. Alma configuration form
2. Acquisitions technical services work order
3. Requests
4. Terminology
5. Multiple places to manage them



Why Are Work Orders Confusing?

Alma Configuration Form

	A	B	C	D	E	F	H	I	J	K
1	Work Order Types and Statuses									
2										
3	1) Yes is automatically selected in the first column to indicate that the Institutional-level Work Order Type, Department, and Statuses described in that row will be created in Alma.									
4	2) Ensure to add a printer, which is configured on the insitutional level in Printers Tab.									
5	3) The values contained in the first row are a suggestion. You may modify these. Additional Work Order Types, Departments and Statuses can be described in the rows provided. Note that Codes and Names must be unique.									
6	4) Each Work Order Status consists of a numbered pair: Code and Name. You may configure a maximum of 4 Statuses for each Work Order. If you require additional statuses, contact your Ex Libris Implementation Team.									
7										
8	Create?	Work Order Type Code	Work Order Type Name	Recalls Loans?	Department Code	Department Name	Work Order Status Code 1	Work Order Status Name 1	Work Order Status Code 2	Work Order Status Name 2
9										
10	Yes	PRESERV	Presevation	Y	PRESRVDEPT	Institutional Preservation Dept	ANALYSIS	Analysis	BINDING	Binding
11	Yes	TechServ	Technical Services	N			BIND	Bindery	CopyCat	Cop Cataloging
12										
13										
14										
15										
16										
17										
18										

Why Are Work Orders Confusing?

Acquisitions Technical Services Work Order

- Default work order type
- Hardwired into Alma
- Often tied to receiving
- “Keep in Department” means Acquisitions Department

Receive New Material

Keep in
Department

← Puts the received item into a work order

BCC Library - BX001
Acquisitions Department



Location

I am physically at:

BCC Library - BX001 Acquisitions Department

Why Are Work Orders Confusing?

Requests

- Most processes in Alma are requests:
 - Borrowing request
 - Digitization request
 - Hold request
 - Move request
 - Purchase request
 - Transit for reshelving
 - Work orders



The Gebusi: lives Transformed in a Rainforest World

Request Type: Acquisition technical services

ID: 2624896310006139

Creator: [WILSON, THOMAS](#)

MMS ID: 9994456760806139

Pickup Location: YC001 Acquisitions Department

Barcode: 34450002060595

Place in Queue: 0

Request Date: 08/30/2022

Material Type: Book

Why Are Work Orders Confusing?

Terminology

- Different terms display in different areas of Alma
- Work Order Type = Process Type = Request Type
- Work Order Status = Workflow Step Status = Process Status



Why Are Work Orders Confusing?

Terminology - Work Order Type

Shirley Jackson : a rather haunted life / Ruth Franklin.

Book By Franklin, Ruth, (New York : Liveright Publishing Corporation, 2017.)

Barcode: 9417513-10

Library: BMCC Library

Creation Date: 03/08/2020 08:00:00 PM

Modification Date: 09/09/2020 10:01:24 AM

Process type: Acquisition technical services (PhysicalProcess)

Work Order Type

Acquisition technical services

Place Item in Process

Process Type *

Acquisition technical services

Workflow Step



In Process (1)

Request/Process Type



Acquisition technical... (1)

1



Shirley Jackson : a rather haunted life / Ruth Franklin.

Request Type: Acquisition technical services

ID: 313704050006141

Creator: System

MMS ID: 990094175130106141

Pickup Location: BM001 Acquisitions Department

Why Are Work Orders Confusing?

Terminology - Work Order Status

Shirley Jackson : a rather haunted life / Ruth Franklin.

Book By Franklin, Ruth, (New York : Liveright Publishing Corporation, 2017.)

Barcode: 9417513-10

Library: BMCC Library

Creation Date: 03/08/2020 08:00:00 PM

Modification Date: 09/09/2020 10:01:24 AM

Process type: Acquisition technical services (PhysicalProcess)

Set Status To

Physical Processing

Workflow Step ▾

In Process (1)

Request/Process Type ▾

Acquisition technical... (1)

Request Date ▾

Older (1)

Date Needed By ▾

Undefined (1)

Workflow Step Status ▾

Physical Processing (1)



Shirley Jackson : a rather haunted life / Ruth Franklin.

Request Type: Acquisition technical services

ID: 313704050006141

Creator: System

MMS ID: 990094175130106141

Pickup Location: BM001 Acquisitions Department

Barcode: 9417513-10

Workflow Step: In Process

Process Status: Physical Processing

Managed By Department: BM001
Acquisitions Department

Process Date: 09/09/2020

Expiration Date: 09/16/2020

Why Are Work Orders Confusing?

Multiple Places to Manage Them

- Fulfillment Monitor Requests & Item Processes
- Fulfillment Manage In Process Items
- Acquisitions Receiving Department Items
- Fulfillment Scan In
- Acquisitions Scan In

Examples of Work Orders

	Work Order Name	Work Order Department
1.	Acquisition Technical Services (receiving)	Acquisitions
2.	Acquisition Technical Services (no receiving)	Acquisitions
3.	Damaged Items	Circulation
4.	Missing Items Search	Circulation
5.	Digitization on Demand	Digitization on Demand

Examples of Work Orders

Acquisition Technical Services (receiving) - Overview



Purchased book arrives at library



Acquisitions receives book with “Keep in Department” and work order status cataloging



Cataloging catalogs book, then changes work order status to labeling



Collection Management labels book, then completes work order



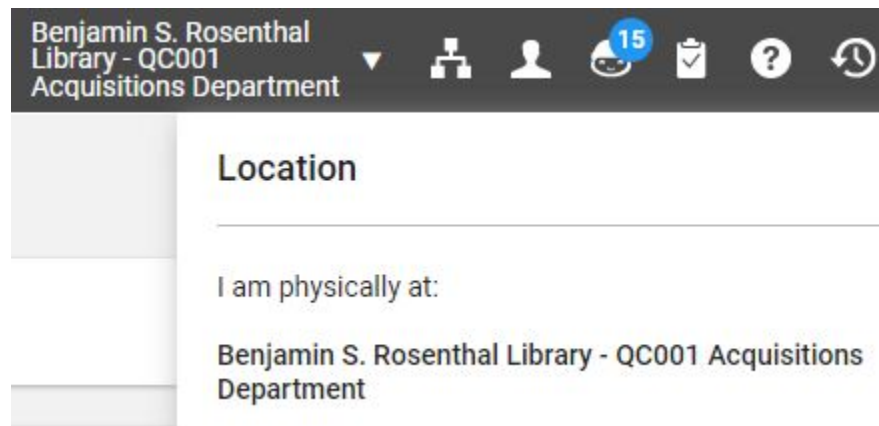
Public Services shelves book

- Created by Ex Libris; available out of the box
- The only work order dependent on receiving
- Multiple work order statuses
- Actions of Public Services not represented in work order

Examples of Work Orders

Acquisition Technical Services (receiving) - What Does It Look Like?

1. Staff must be physically at acquisitions department



The screenshot shows a mobile application interface. At the top, there is a dark header bar with the text "Benjamin S. Rosenthal Library - QC001 Acquisitions Department" on the left. To the right of the text are several icons: a dropdown arrow, a person icon, a smiley face icon with a blue circle containing the number "15", a clipboard icon, a question mark icon, and a refresh icon. Below the header bar, there is a light gray rectangular area. Underneath this area, the word "Location" is displayed in bold. A horizontal line follows. Below the line, the text "I am physically at:" is shown. At the bottom of the form, the text "Benjamin S. Rosenthal Library - QC001 Acquisitions Department" is entered.

Examples of Work Orders

Acquisition Technical Services (receiving) - What Does It Look Like?

2. Go to Acquisitions Receive
 - a. Check the box next to “Keep in Department”
 - b. Select “Cataloging”

Receive New Material

Keep in Department Cataloging

Examples of Work Orders

Acquisition Technical Services (receiving) - What Does It Look Like?

3. Receive the item

One Time **Continuous**

1 - 20 of 132 All Filter by vendor Filter by owning library

Status: Sent Locate: PO Lines Filter orders with interested users: No Filter orders with patron requests: No Clear all

<input type="checkbox"/>	#	Item description	Status	Locations	# Ordered	Items Received	Date Sent	Next Step	Rush	Notes	Receiving note	Interested Users	
<input type="checkbox"/>	1	POL-2176 Subjects matter : exceeding standards through powerful content-area reading / Harvey 'Smokey' Daniels, Steven Zemelman., Portsmouth, NH ; Heinemann,, 2014, 9780325050836, ISBN	Sent	Benjamin S. Rosenthal Library - Stacks (Call # A-L Level 4; Call # P-Z Level 5) (1)	1	0	08/09/2022	-			elkins note	✓	...
<input type="checkbox"/>	2			-		...

- Manage Items
- Receive**
- Print interested users list
- View hidden

Examples of Work Orders

Acquisition Technical Services (receiving) - What Does It Look Like?

4. After cataloging is complete, go to Acquisitions Scan In Items
 - a. Set Status To: Labeling
 - b. Scan the item barcode

The screenshot shows a web interface with two tabs: 'Scan in Items' (active) and 'Change Item Information'. Below the tabs are several form fields:

- 'Automatically print slip' with radio buttons for 'Yes' and 'No' (selected).
- 'Set Status To' dropdown menu with 'Labeling' selected.
- 'Done' with radio buttons for 'Yes' and 'No' (selected).
- 'Scan item barcode *' text input field containing '100007839', with a menu icon and an 'OK' button.
- 'Scan request ID' text input field with an 'OK' button.

Examples of Work Orders

Acquisition Technical Services (receiving) - What Does It Look Like?

5. After labeling is complete, go to Acquisitions Scan In Items
 - a. Set Status To: [none]
 - b. Done: Yes
 - c. Scan the item barcode

Scan in Items Change Item Information

Automatically print slip Yes No

Set Status To

Done Yes No

Scan item barcode *

Scan request ID

Examples of Work Orders

Acquisition Technical Services (no receiving) - Overview



Older book has broken spine



Technical Services puts book into Acquisition Technical Services work order with status Binding



Item is sent to bindery, gets bound, and returns



Technical Services completes work order



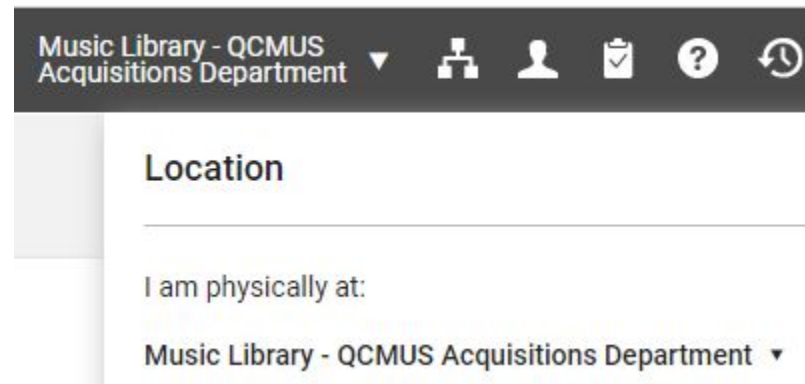
Public Services reshelves book

- Still using the same Acquisition Technical Services but not receiving the item first
- Single work order status
- Actions of Public Services not represented in work order

Examples of Work Orders

Acquisition Technical Services (no receiving) - What Does It Look Like?

1. Staff must be physically at acquisitions department



The screenshot shows a software interface for creating a work order. At the top, there is a dark header bar with the text "Music Library - QCMUS Acquisitions Department" and a dropdown arrow, followed by several icons: a tree structure, a person, a clipboard, a question mark, and a refresh symbol. Below the header, the "Location" field is highlighted with a light gray background. The text "I am physically at:" is displayed above the field, and the selected value "Music Library - QCMUS Acquisitions Department" is shown within the field with a dropdown arrow.

Examples of Work Orders

Acquisition Technical Services (no receiving) - What Does It Look Like?

2. Go to Acquisitions Scan In Items
 - a. Set Status To: Binding
 - b. Scan the item barcode

Scan in Items

Automatically print slip Yes No

Set Status To

Done Yes No

Scan item barcode *

Scan request ID

Examples of Work Orders

Acquisition Technical Services (receiving) - What Does It Look Like?

3. After item returns from bindery, go to Acquisitions Scan In Items
 - a. Set Status To: [none]
 - b. Done: Yes
 - c. Scan the item barcode

Scan in Items | Change Item Information

Automatically print slip Yes No

Set Status To

Done Yes No

Scan item barcode *

Scan request ID

Examples of Work Orders

Damaged Items - Overview



Patron or staff reports damaged item



Public Services puts item into Damaged Items work order



Public Services evaluates whether item should be bound or repaired



Public Services changes work order status to repair



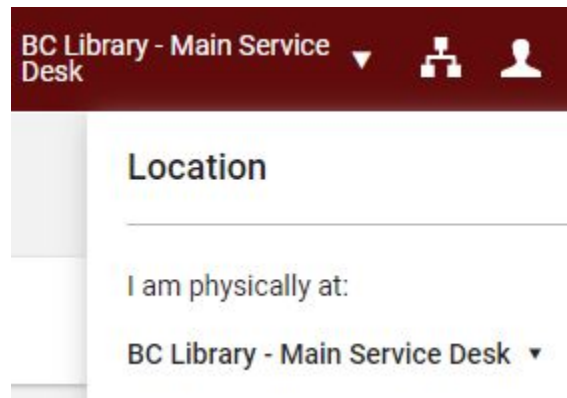
Public Services completes work order when item is repaired



- Public Services wanted a work order that wouldn't require them to switch departments
- Utilizes existing circulation desk
- Has multiple statuses like binding and repair

Examples of Work Orders

Damaged Items - What Does It Look Like?

1. Staff must be physically at circulation desk



BC Library - Main Service Desk ▾  

Location

I am physically at:

BC Library - Main Service Desk ▾

Examples of Work Orders

Damaged Items - What Does It Look Like?

2. Go to Fulfillment Scan In Items

- Work Order Type: Damaged
- Set Status To: Damaged
- Scan the item barcode

Scan in Items | Change Item Information

Place directly on hold shelf Yes No

Automatically print slip Yes No

External Identifier Yes No

Work Order Type

Set Status To

Done Yes No

Scan item barcode *

Scan request ID

Examples of Work Orders

Damaged Items - What Does It Look Like?

3. Go to Fulfillment Scan In Items

a. Work Order Type: Damaged

b. Set Status To: Repair

c. Scan the item barcode

Scan in Items | Change Item Information

Place directly on hold shelf Yes No

Automatically print slip Yes No

External Identifier Yes No

Work Order Type **Damaged**

Set Status To **Repair**

Done Yes No

Scan item barcode * **31228004417325**

Scan request ID

Examples of Work Orders

Damaged Items - What Does It Look Like?

4. Go to Fulfillment Scan In Items
 - a. Work Order Type: Damaged
 - b. Set Status To: [none]
 - c. Done: Yes
 - d. Scan the item barcode

The screenshot shows a web interface for scanning in items. At the top, there are two tabs: "Scan in Items" (active) and "Change Item Information". Below the tabs, there are several form fields and radio buttons:

- Place directly on hold shelf:** Radio buttons for "Yes" (checked) and "No".
- Automatically print slip:** Radio buttons for "Yes" and "No" (checked).
- External Identifier:** Radio buttons for "Yes" and "No" (checked).
- Work Order Type:** A dropdown menu with "Damaged" selected.
- Set Status To:** A dropdown menu with a yellow highlight.
- Done:** Radio buttons for "Yes" (checked) and "No".
- Scan item barcode *:** A text input field containing "31228004417325" with a search icon and an "OK" button.
- Scan request ID:** An empty text input field with an "OK" button.

Examples of Work Orders

Missing Items Search - Overview



Patron or staff reports item not on shelf

1

Public Services puts item into Missing Items Search work order with work order status 1st search



Public Services searches for item, but doesn't find it

2

Public Services changes work order status to 2nd search



Public Services searches for item, but doesn't find it



Public Services completes work order



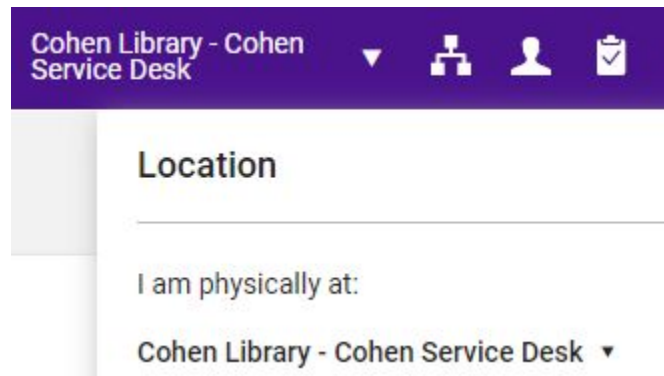
Public Services marks item missing

- Public Services wanted a work order that wouldn't require them to switch departments
- Utilizes existing circulation desk
- Has statuses meant to be used sequentially

Examples of Work Orders

Missing Items Search - What Does It Look Like?

1. Staff must be physically at circulation desk



Cohen Library - Cohen Service Desk

Location

I am physically at:

Cohen Library - Cohen Service Desk

The screenshot shows a purple header bar with the text "Cohen Library - Cohen Service Desk" and three icons: a dropdown arrow, a person icon, and a clipboard icon. Below the header is a white panel with the heading "Location" and a horizontal line. Underneath, the text "I am physically at:" is followed by a dropdown menu showing "Cohen Library - Cohen Service Desk" with a small downward arrow.

Examples of Work Orders

Missing Items Search - What Does It Look Like?

2. Go to Fulfillment Scan In Items

- Work Order Type: Missing items Search
- Set Status To: 1st search
- Scan the item barcode

The screenshot shows a web interface for creating a work order. At the top, there are two tabs: 'Scan in Items' (active) and 'Change Item Information'. Below the tabs are several form fields:

- Automatically print slip:** Radio buttons for 'Yes' (unselected) and 'No' (selected).
- External Identifier:** Radio buttons for 'Yes' (unselected) and 'No' (selected).
- Work Order Type:** A dropdown menu with 'Missing items search' selected.
- Set Status To:** A dropdown menu with '1st search' selected.
- Done:** Radio buttons for 'Yes' (unselected) and 'No' (selected).
- Scan item barcode *:** A text input field containing 'BAR3272054' with a search icon and an 'OK' button.
- Scan request ID:** An empty text input field with an 'OK' button.

Examples of Work Orders

Missing Items Search - What Does It Look Like?

3. Go to Fulfillment Scan In Items

- Work Order Type: Missing items Search
- Set Status To: 2nd search
- Scan the item barcode

The screenshot shows a web interface for creating a work order. At the top, there are two tabs: 'Scan in Items' (active) and 'Change Item Information'. Below the tabs are several form fields:

- Automatically print slip:** Radio buttons for 'Yes' (unselected) and 'No' (selected).
- External Identifier:** Radio buttons for 'Yes' (unselected) and 'No' (selected).
- Work Order Type:** A dropdown menu with 'Missing items search' selected.
- Set Status To:** A dropdown menu with '2nd search' selected.
- Done:** Radio buttons for 'Yes' (unselected) and 'No' (selected).
- Scan item barcode *:** A text input field containing 'BAR3272054' with a search icon and an 'OK' button.
- Scan request ID:** An empty text input field with an 'OK' button.

Examples of Work Orders

Missing Items Search - What Does It Look Like?

4. Go to Fulfillment Scan In Items

- Work Order Type:
Missing items
Search
- Set Status To:
[none]
- Done: Yes
- Scan the item
barcode

The screenshot shows a web interface for creating a work order. At the top, there are two tabs: 'Scan in Items' (active) and 'Change Item Information'. Below the tabs are several form fields:

- 'Automatically print slip' with radio buttons for 'Yes' (unselected) and 'No' (selected).
- 'External Identifier' with radio buttons for 'Yes' (unselected) and 'No' (selected).
- 'Work Order Type' with a dropdown menu showing 'Missing items search' highlighted in yellow.
- 'Set Status To' with a dropdown menu showing a yellow highlight.
- 'Done' with radio buttons for 'Yes' (selected) and 'No' (unselected).
- 'Scan item barcode *' with a text input field containing 'BAR3272054' and a yellow highlight, followed by a menu icon and an 'OK' button.
- 'Scan request ID' with an empty text input field and an 'OK' button.

Examples of Work Orders

Missing Items Search - What Does It Look Like?

5. Do a title search
 - a. View the item
 - b. Toggle Missing Status

	Barcode	Library	Location	Call Number	Item Call Number	Year	Volume	Description	Temporary Location	Status	Process type	Receiving date	
1	BAR3272054	Cohen Library	Cohen Stacks, check floor plan	PB2298.E52 C87 2001	-	-	-	-	No	Item in place (awaiting reshelving until 09/08/2022 08:16:00 PM)	-	02/20/2016	...

- View
- Edit
- Request
- Duplicate
- Change Location
- Withdraw
- Toggle Missing Status**
- Work Order
- View hidden

Examples of Work Orders

Digitization on Demand - Overview



Patron requests digitized copy of dissertation/thesis



Public Services picks the item from the shelf and puts it into DoD work order



Technical Services retrieves the item from Public Services and digitizes it



Technical Services returns the item to Public Services and emails them the URL of the digitized copy



Public Services emails the URL to the patron



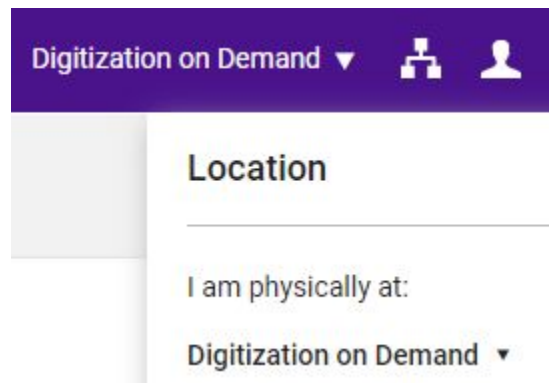
Public Services completes the work order and reshelves the item

- Complex workflow involving patrons, Public Services, and Technical Services
- Work order creates fake Digitization on Demand department for tracking activity between real departments
- *Could* have multiple statuses like cataloging and scanning

Examples of Work Orders

Digitization on Demand - What Does It Look Like?

1. Staff must be physically at “Digitization on Demand” department



The screenshot shows a user interface for a work order system. At the top, there is a purple header bar with the text "Digitization on Demand" and a dropdown arrow, followed by two icons: a building and a person. Below this, a grey sidebar is partially visible. The main content area has a "Location" label, a horizontal line, and the text "I am physically at:". Below this, there is a dropdown menu with "Digitization on Demand" selected and a dropdown arrow.

Examples of Work Orders

Digitization on Demand - What Does It Look Like?

2. Locate the item and select “Work Order”

The cracking wheel : irony in Shakespear's Macbeth / by Andrew Garner.

Book By Garner, Andrew. (City College of New York 2000.)

Barcode: **BAR3271606**

Library: Cohen Library

Creation Date: 02/19/2016 07:00:00 PM

Modification Date: 07/05/2020 06:36:29 AM

Call Number: M.A. Thesis English Lit 407

Call Number Type: Shelving control number

Status: Item in place

Due back: -

Item Policy: Non Circulating

Item ID: 2365339310006138

Holdings ID: 2265339320006138

MMS ID: 990042314370106138

Edit Item Request ...

- Work Order
- Withdraw
- Holdings

Examples of Work Orders

Digitization on Demand - What Does It Look Like?

3. Choose Process Type “Digitization on Demand”

< Place Item in Process

Place Item in Process

Process Type *

Do not pick from shelf

Note

Managing Department *

Examples of Work Orders

Digitization on Demand - What Does It Look Like?

4. Item is now in the DoD work order

The cracking wheel : irony in Shakespear's Macbeth / by Andrew Garner.

Book By Garner, Andrew. (City College of New York 2000.)

Barcode: BAR3271606

Library: Cohen Library

Creation Date: 02/19/2016 07:00:00 PM

Modification Date: 09/05/2022 10:26:42 AM

Process type: Digitization on Demand

Call Number: M.A. Thesis English Lit 407

Call Number Type: Shelving control number

Status: Item not in place

Due back: -

Item Policy: Non Circulating

Material Type: Book

Requests: 1

Item ID: 2365339310006138

Holdings ID: 2265339320006138

MMS ID: 990042314370106138

Examples of Work Orders

Digitization on Demand - What Does It Look Like?

5. Go to “Manage In Process Items” and select “Done”

In Process Items Scan In Items

1 - 1 of 1 0 rows selected Generate Barcode Done Change Status ▾

Process Status : All ▾ Request Filter : All ▾ Library : All ▾

<input type="checkbox"/>	▲ Title	Identifier	Barcode	↕ Status	↕ Date received for department	↕ End of Activity	Modified By	Modification Date	Requests	Cancelled	Notes	Library	
1. <input type="checkbox"/>	The cracking wheel : irony in Shakespear's Macbeth / by Andrew Garner.	-	BAR3271606	-	09/05/2022	09/10/2022	admin	09/05/2...	No requests			Cohen Library	<ul style="list-style-type: none">Edit Inventory itemEditDone

Best Practices

Creating Work Orders

- Need General System Administrator role to configure work orders
- Don't create work order departments unless necessary—use circulation desks and acquisitions departments so staff don't have to change their locations frequently
- Create work orders with multiple statuses instead of creating multiple work orders without statuses
- If your work order statuses are sequential, use 1st, 2nd, 3rd, etc. instead of First, Second, Third, etc.

Best Practices

Using Work Orders

- Permissions needed to use work orders depend on how the work order was configured
- Test, test, test! (In the sandbox, if possible)
- Demonstrate rather than explain
- Must stay in same department throughout the work order
- You're not stuck with your current configuration. You can redo it!

Alternatives to Work Orders

- Temporary locations
- Pseudo-patrons
- Item notes
- Collections



Questions?
Comments?

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