

Work Orders in ExLibris Alma

Presented by Shelby Moore and
Tomeka Jackson



The Goal and Purpose

- Our goal is to present the importance of work orders within the USG's library service platform, ExLibris Alma, to increase collaboration and to streamline workflows between library units.

Introduction

- As we are a multi-campus system with our Technical Services unit residing off-campus, creating workflows and collaborating with other library units can be quite challenging.
- This session will detail how using Alma work orders is important for creating a tracking record between resources and facilities, conducting a proper work order within Alma, and the training techniques that can be used for faculty and staff who use these work orders.
- Furthermore, we will explore the versatility of work orders for book repairs, data on circulation, day to day access for services, explain shelf-ready errors and how to use a work order for those issues, and explain the potential for further research opportunities with Alma work orders.

What Is a Work Order

- A work order is a reporting process that creates a track record between resources and facilities in Alma.

Types of Work Orders



Repairs



Shelf Ready Errors

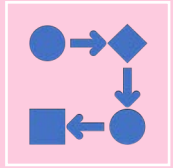


Note: there are other types of work orders, however, we currently do not have need of them.

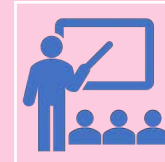
Why You Should Use Work Orders

- The versatility of work orders is endless. Tracking book repairs, keeping data on circulation and day to day access for services, making sure monographs with shelf-ready errors are fixed and returned to their owning libraries, etc. all become much easier when you employ work orders in your library system.

Work Order Process



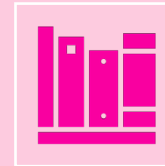
The process of creating work orders begins in Access Services who creates the work order in Alma.



The work order is then reviewed by Collection Development, who determines what needs to be done with the item. For example, if a book has a repairs work order on it, Collection Development determines what repair the item needs.



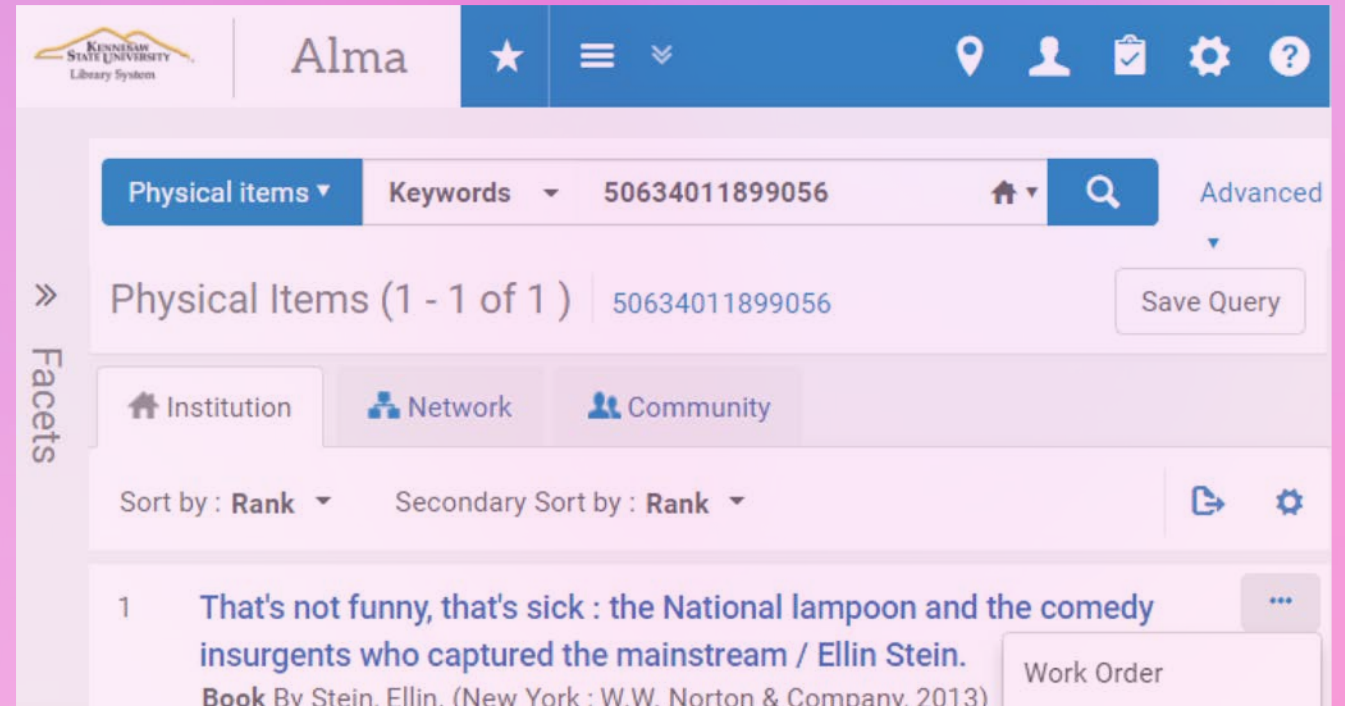
The item is then mailed to our Technical Services department off of the main campus to be further reviewed. If an item has a repairs work order, Technical Services then determines whether it's able to be repaired or if it needs replaced outright. If it can be repaired, the item is checked in, the issue is fixed, and the item is then sent back to Access Services.



From there, Access Services removes the work order and shelves the item. This bouncing between departments is akin to a monograph ping pong match.

Process Part I: Access Services

Create a work order by clicking on the “Work Order” option of the item menu.



Process Part II

- Select "Repairs" from the "Process Type" drop down. Check "Do not pick from shelf" if you have the book in hand. Add a note about what repairs are needed. Select "Repairs" as the managing department.

That's not funny, that's sick : the National lampoc

Institution	Kennesaw State University
--------------------	---------------------------

Place Item in Process

Process Type *	Repairs ▼
Do not pick from shelf	<input checked="" type="checkbox"/>
Note	Needs a new cover. //
Managing Department *	Repairs ▼

Process Part III: Collection Development

- When logging into Alma, select the “Repairs” desk.
- From the Fulfillment drop-down menu, select “Scan In Items”.
- Set the status to “Collection Development Review” and scan the barcode.

< Scan In Items

Scan in Items Change Item Information

Automatically print slip ☐ Yes ☒ No

Set Status To **Collection Development Review**

Done ☐ Yes ☒ No

Scan item barcode * 50634011899056 OK

Scan request ID OK

	Title	Destination	Barcode	Request/Process Type	Re
1	That's not funny, that's sick : the National lampoon and the comedy insurgents who captured the mainstream / Ellin Stein.	Manage Locally	50634011899...	Repairs	-

Process Part VI

Click on the hyperlinked title to see any notes from Access Services about the damage.

<

Create Request

That's not funny, that's sick : the National lampoon a

Institution

Kennesaw State University

Create Request

Request Type *

Repairs

Do not pick from shelf

☒

Note

Ariel forgot to take a screenshot of the notes part of repairs.

Managing Department *

Repairs

Process Part V

- After reviewing the item, if a determination is made that it should be repaired, log into Alma again and select the “Repairs” desk. Return to “Scan In Items”. Set the status to “In Transit to Technical Services” and scan the barcode.
- Click on the hyperlinked title to add or edit any existing notes about repairs that need to be done.
- Return to shelving area for Access Services to box and send off.

The screenshot shows the 'Scan In Items' form in Alma. At the top, there is a back arrow and the title 'Scan In Items'. Below this are two tabs: 'Scan in Items' (active) and 'Change Item Information'. The form contains several fields and options:

- Automatically print slip:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- Set Status To:** A dropdown menu currently showing 'In Transit to Technical Services'.
- Done:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- Scan item barcode *:** A text input field containing '50634011899056', followed by a menu icon and an 'OK' button.
- Scan request ID:** An empty text input field followed by an 'OK' button.

Process Part VI: Technical Services

- When receiving a box of repairs items, log into Alma and select the “Repairs” desk.
- Select “Scan In Items” from the fulfillment dropdown menu.
- Set the status to “Tech Services Review.”

The screenshot shows the 'Scan In Items' page in the Alma system. The left sidebar contains navigation links for Alma, Acquisitions, Resources, Fulfillment, Admin, and Analytics. The main area has tabs for 'Scan in Items' and 'Change Item Information'. Below these are form fields for 'Automatically print slip' (set to No), 'Set Status To' (set to Tech Services Review), 'Done' (set to Yes), 'Scan item barcode' (with a search bar), and 'Scan request ID'. A 'Create Item' button is also present. At the bottom, a table displays the scanned item.

Title	Destination	Barcode	Request/Process Type	Requester	Requester ID	Place in Queue	Checked In
The urban design handbook : techniques and working methods / Urban Design Associates ; authors, Ray 1. Gindroz [and others] ; with contributions by Donald Kaliszewski [and others] ; preface by David Lewis ; editor and contributing writer Karen Levine.	Johnson Library	30427001911865	Repairs	-	-	1	

Process Part VII

- Click on the hyperlinked title to see notes from Access Services and Collection Development.
- From here, we place the repairs items on a designated shelf where they wait to be fixed and sent back to Access Services.
- Once the item has been repaired, we document the repairs in an Excel spreadsheet. Documenting repairs enables us to review our process for similar issues.

The screenshot shows the 'Create Request' form in the Kenesaw State University system. The form is titled 'Create Request' and has a back arrow on the left. The 'Request Type' is set to 'Repairs'. The 'Do not pick from shelf' checkbox is checked. The 'Note' field contains the text 'pages falling out of the text block'. The 'Managing Department' is set to 'Repairs'. The left sidebar contains navigation links for Alma, Acquisitions, Resources, Fulfillment, Admin, and Analytics. The top navigation bar includes search filters for 'All titles' and 'Keywords'.

KenESAW STATE UNIVERSITY

All titles Keywords

Create Request

Create Request

Request Type * Repairs

Do not pick from shelf ☒

Note pages falling out of the text block

Managing Department * Repairs

Shelf- Ready Error Work Orders

- On rare occasions, we receive work orders for monographs with shelf-ready errors. The same process is applied.
- First, we address the repair issue before moving onto the shelf- ready error issue.

The screenshot shows a web application titled 'Scan in Items'. The interface includes a top navigation bar with 'All titles' and 'Keywords' dropdowns, a search icon, and a 'Repairs' dropdown. On the left is a sidebar with icons for 'Home', 'Visions', 'Sources', 'Item', 'Admin', and 'Analytics'. The main content area has two tabs: 'Scan in Items' (active) and 'Change Item Information'. Below the tabs are several input fields: 'Automatically print slip' with radio buttons for 'Yes' and 'No' (selected), 'Set Status To' with a dropdown menu showing 'Tech Services Review', 'Done' with radio buttons for 'Yes' (selected) and 'No', 'Scan item barcode' with a text input and an 'OK' button, and 'Scan request ID' with a text input and an 'OK' button. A 'Create Item' button is also present. Below the input fields, it says '1 - 1 of 1'. A table with 8 columns is displayed: 'Title', 'Destination', 'Barcode', 'Request/Process Type', 'Requester', 'Requester ID', 'Place In Queue', and 'Checked In'. The table contains one row with the following data: 'Operations management for business excellence : building sustainable supply chains / David Gardiner and Hendrik Reefke', 'Manage Locally (Shelf Ready Errors)', '50634012101569', 'Shelf Ready Errors', '-', '-', '1', and a three-dot menu icon. The bottom of the screen shows a Windows taskbar with a search bar and several application icons.

Title	Destination	Barcode	Request/Process Type	Requester	Requester ID	Place In Queue	Checked In
1. Operations management for business excellence : building sustainable supply chains / David Gardiner and Hendrik Reefke	Manage Locally (Shelf Ready Errors)	50634012101569	Shelf Ready Errors	-	-	1	...

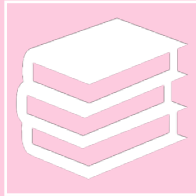
Shelf- Ready Error Work Orders Cont'd

- Here we see the note associated with this shelf- ready error book.
- After addressing the issue and fixing whatever is needed, Technical Services will then scan the item in Alma to indicate it is traveling to Access Services.
- From there, Access Services will receive the item, scan it into Alma, and shelve it.

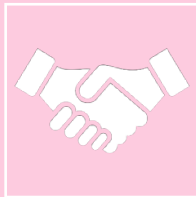
The screenshot shows the Alma 'Create Request' interface. The top navigation bar includes the Alma logo, a search bar with 'All titles' and 'Keywords' filters, and a home icon. The left sidebar contains navigation links for Alma, Acquisitions, Resources, Fulfillment, Admin, and Analytics. The main content area is titled 'Create Request' and features a form with the following fields:

- Request Type ***: Shelf Ready Errors
- Do not pick from shelf**: ☒
- Note**: missing spine label
- Managing Department ***: Shelf Ready Processing

Issues Discovered



After experiencing a lack of communication between other library units regarding the location of monographs on the move, we realized a need for work orders within Alma to track where an item is and to improve communication with other units.

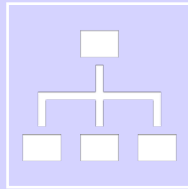


Through using work orders, we have been able to track items effectively while also building and strengthening inter-departmental partnerships within our multi-campus library system.

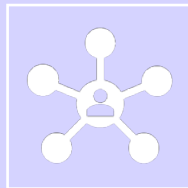
Issues Discovered Cont'd



Inconsistency amongst policies and procedures across different departments have caused issues with work orders in ExLibris Alma.



Streamlining of these policies and procedures has helped reduce issues of work order stacking and other work order issues.



Focusing on communication between departments, we have been able to rectify these issues by listening to those involved within Access Services and Technical Services and determining the underlying issue.

Training Workshops

- We started conducting training workshops for both campuses to teach library faculty and staff from different units how to create, modify, and remove work orders and recognize some of the pitfalls and how to prevent them.
- These training sessions have been beneficial as our colleagues from Access Services have met with us to go over their procedures while updating their current policies.

Benefits of the Work Order

- Benefits of the Shelf-Ready Work Order – tracking purposes, inter-departmental communication
- Benefits of the Repairs Work Order – since they can sit on the repairs shelf for months or even years unless it has a rush order, it's easy to track down these items in case it is requested
 - Book repair spreadsheet – in case it is lost in transit, we have the record that we processed and mailed it

The background of the slide is a close-up, high-resolution image of a wood grain. The grain is composed of numerous concentric, slightly irregular rings, creating a textured, organic pattern. The color palette is a gradient of purples, ranging from a deep, dark purple on the left to a lighter, more vibrant magenta on the right. The lighting appears to come from the right, casting soft shadows and highlighting the texture of the wood.

Thank you for attending our
presentation.

We hope you have a wonderful
day!