Work Orders in ExLibris Alma

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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.
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: Acess 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.
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.
Process Part VI

Click on the hyperlinked title to see any notes from Access Services about the damage.
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.
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.”
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.
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.
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.
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
Thank you for attending our presentation.

We hope you have a wonderful day!