TECHNICAL SERVICES WORK
ORDERS THAT REALLY WORK

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Outline

• What are work orders
• How work orders are configured
• Deciding HOW (not) to configure your work orders
• Final Lessons Learned
• Q&A
What are work orders?

• A type of request (like patron holds & resource requests)
• A way to track a physical inventory process
  – Acquisitions > Cataloging > Marking
• A way to indicate a series of steps in a workflow
• Easily customizable
Basic Work Order Workflow

- Optionally, Item gets Requested
  - Item is placed into a Work Order Process Type in a Work Order department
    - Work Order is completed, the status set to In Transit, and item is returned to its “home” location
    - Optionally, Item is operated upon
      - Home location returns the item to set the status to Item in Place
Configuration - Where

• Configuration
  → General
  → Work Orders & Departments
• Requires General System Administrator Role
Configuration - How

1. Create a Work Order Type
   • What are the statuses or steps in your workflow?

2a. Create a Work Order Department
   • What departments will use the work order?
   • Who will manage the work order queue?
   • May represent a library unit, a TS unit, or a library desk

   • Note: “Keep in Department” work order for Technical Services is usually set up during migration
Work Order Types

- Work order types may serve one or many departments or desks

Keep in Department

- East Asia Technical Services
- Law Technical Services
- Central Technical Services

Reserves

- Bothell Campus Reserves
- Law Reserves
“Keep in Department” Work Order

• Integrated into Alma Receiving Workbench
• Allows physical inventory to be placed in a work order process at point of receipt in Alma
• Serves all acquisitions / technical services units
Things to consider

- Does the process need to serve multiple TS units?
  - What are the common steps?
- Will the item be processed by more than one operator within the work order department?
- Who “owns” the workflow and should be consulted?
- Have I built a gallows?
Deciding HOW (not) to Configure

Problem #1:
Multiple Tech Services departments, each with their separate work orders and statuses

- Acquisitions/Cataloging = “Keep in Department” work order
- Bindery
- Preservation
Multiple TS Work Order Depts

Bindery

Keep in Department Acquisitions/ Cataloging

Preservation

Circulation
Multiple TS Work Order Depts

Pain points

• Too much scanning in/out of departments
• Too much switching between multiple locations
• The heartache of items constantly In Transit
• “Tangled” multiple work orders on an item
• Design was overkill for simpler workflow

Too complicated of a setup was a hindrance to work
Improvement: One Mainstream Dept

• One mainstream “Keep in Department” tech services work order department
• Represents steps from multiple TS departments (Acquisitions, Cataloging, Preservation)
• Corresponds to “usual/normal” workflow for incoming material
• Create outlier work order departments for less frequent workflows/situations as needed
Improvement: One Mainstream Dept

Keep in Department
Acquisitions/Cataloging/Preservation

ARCS Gifts
ARCS Quickcat
ARCS Research Shelves
ARCS Patron Replacement
ARCS Show to Supervisor
CAMS Cataloging
CAMS Serials Cataloging
CAMS Gov Pubs backlog
CAMS Serials cat
CAMS Spec Materials cataloging
Preservation Marking

CAMS
In DMS
In IS Cataloging
In Media Cataloging
In Serials Cataloging
In Mono Cataloging

Preservation
In Basement
In Binding
In Conservation
In PamBind
In Replacement

Circ
Deciding HOW (not) to Configure

**Problem #2:** Too many statuses created within department work orders

14 (!!!) Acquisition/Cataloging work order statuses:

- Awaiting cataloging
- Bindery prep
- Digitization prep
- In cataloging
- In process
- In repair (technology)
- Lost in process
- On Search
- Permanently Lost
- Permanently Missing
- Preservation Prep
- Storage Missing
- Technical services (default, auto-assigned)
- Technical - Migration

aka “The One To Rule Them All”
Too Many Statuses

Pain points

• Overall clutter and confusion for TS staff
• Vague, poorly-defined statuses
  – In process, In repair (technology) - ???
• Overlapping/ambiguous statuses
  – Awaiting cataloging vs. In cataloging - ???
• Anticipated needs not yet part of established workflows
  – Digitization prep - not a thing
• Statuses representing non-TS work
  – On search, Permanently lost/missing - Circ/Stacks
Too Many Statuses

Pain points (continued)

- Removing statuses involved significant cleanup work
Too Many Statuses

Pain points (continued)

• Pruning statuses left out-of-order meaningless numbers (Use alpha status codes instead)
Improvement: Curated Statuses

- Map your workflows beforehand
- Start with few statuses & keep them simple
- Create statuses only for present needs
- Have/create clear definitions for statuses
- Exercise caution when adding statuses outside TS
- Much easier to add a status later than remove one!
Final Lessons Learned

• Work order department ≠ actual library departments
• Concentrate on one mainstream TS workflow
• Collaborate/consult widely
• Keep it simple/high level
• Start small & view results in all modules
• Document what you did & why
• Sometimes workarounds are still necessary
THANK YOU!

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