

TECHNICAL SERVICES WORK ORDERS THAT REALLY WORK

Erin Grant, Director, Cataloging & Metadata Services

Sion Romaine, Director, Acquisitions & Rapid Cataloging Services

UNIVERSITY LIBRARIES



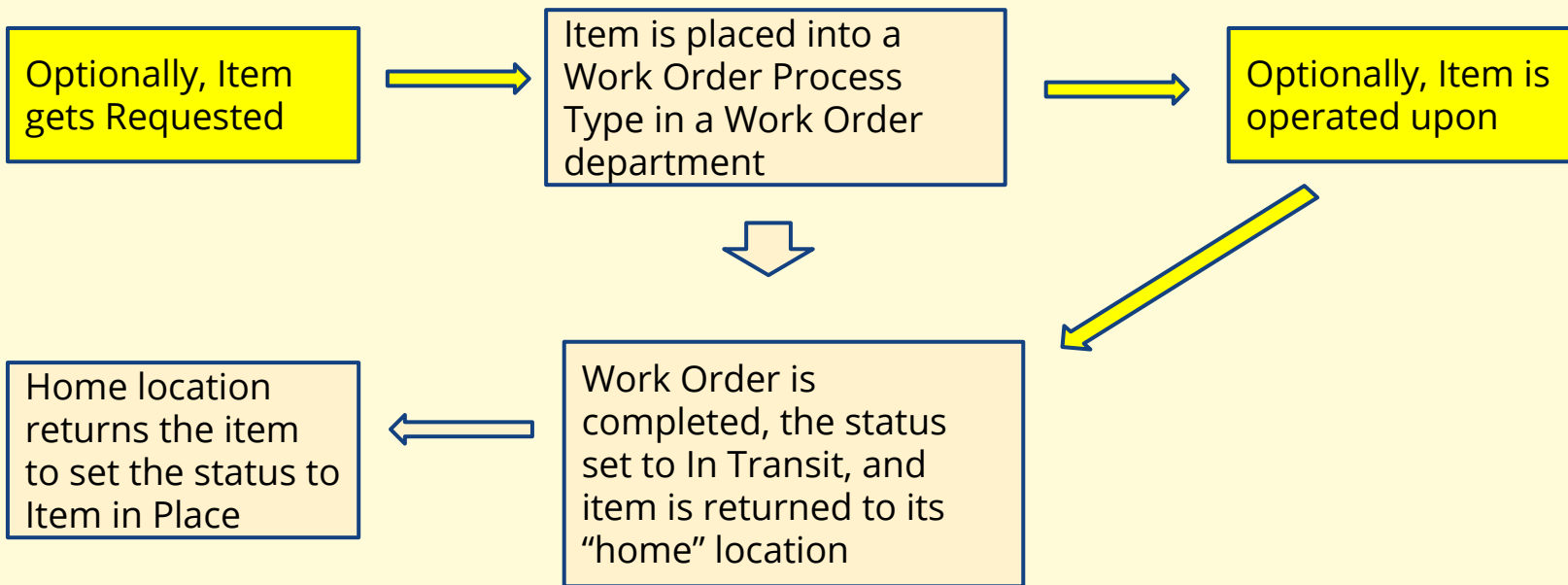
Outline

- 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



Configuration - Where

- Configuration
 - General
 - Work Orders & Departments
- Requires General System Administrator Role



Configuration - How

1. Create a *Work Order Type*

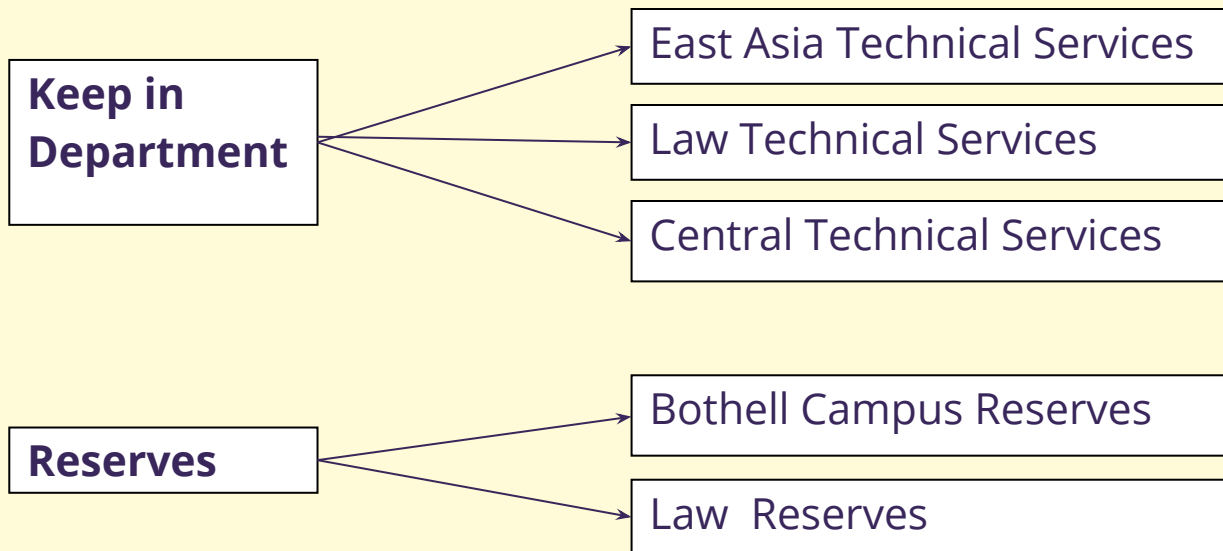
- What are the statuses or steps in your workflow?

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” 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

Receive New Material

Keep in
Department

ARCS Quickcat



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?

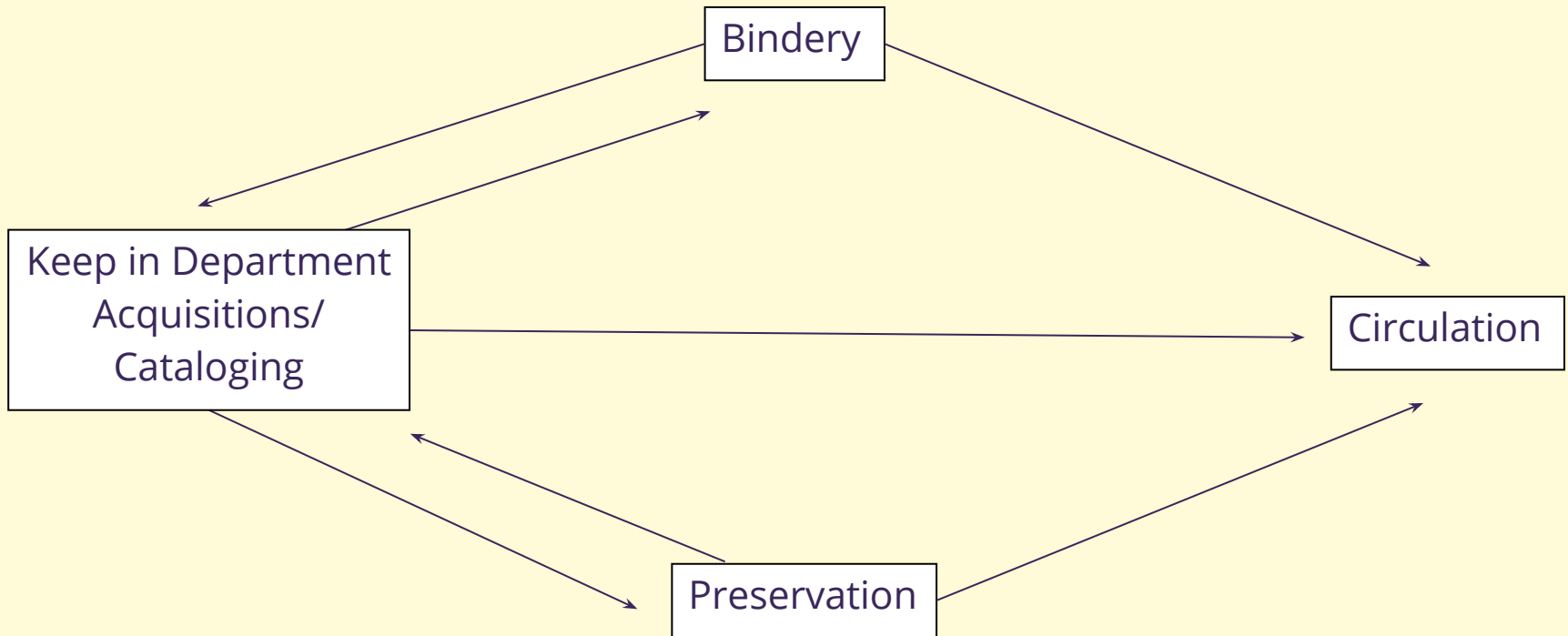
Deciding HOW (not) to Configure

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



Multiple TS Work Order Depts

Pain points

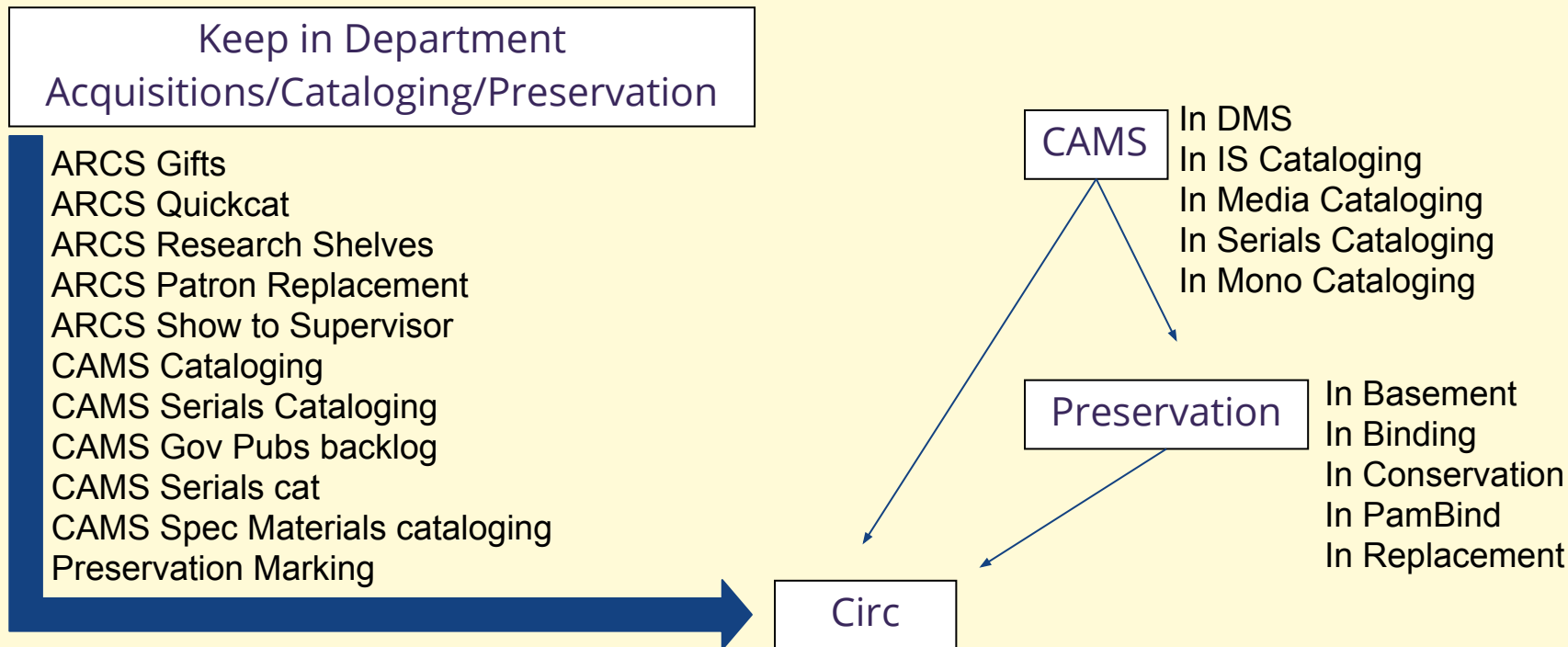
- Too much scanning in/out of departments
- Too much switching between multiple locations
- The heartache of items constantly In Transit
- “Tangled” multiple work orders on an item
- Design was overkill for simpler workflow

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



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



Too Many Statuses

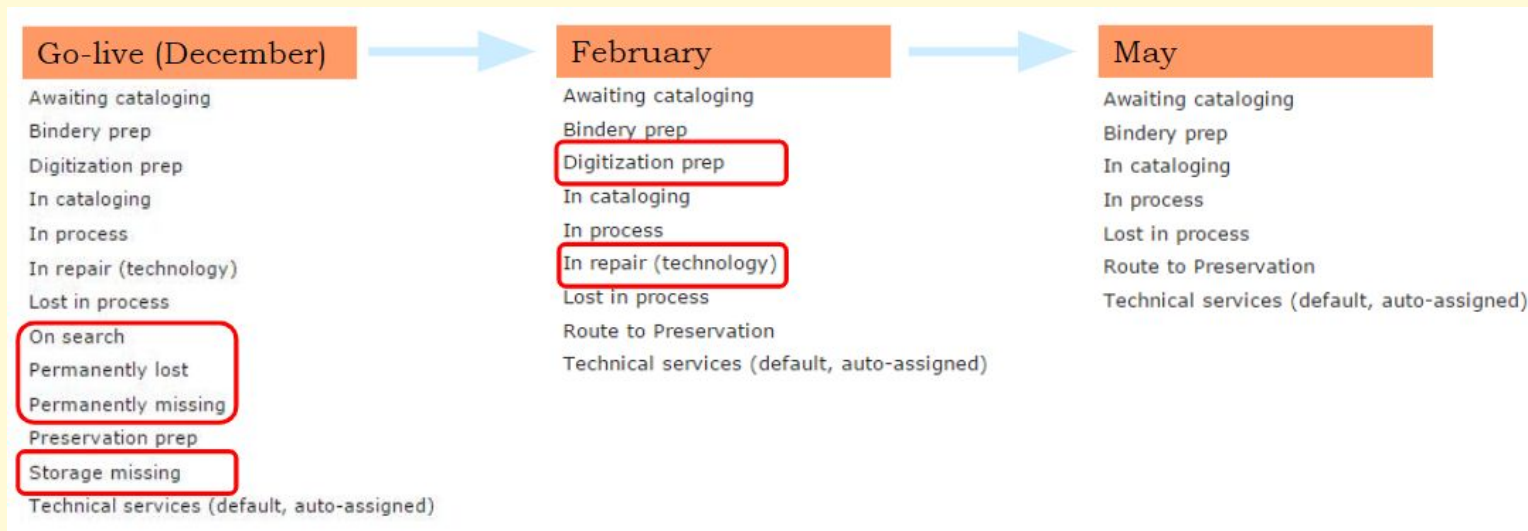
Pain points

- 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)



Status	Process type	Access
Item in place	-	-
Item not in place	Technical Services (12)	-

Awaiting cataloging (2)
Bindery prep (3)
In cataloging (5)
In process (6)
Lost in process (8)
Route to Preservation (12)
Technical services (default, auto-assigned) (14)

An arrow points from the 'Route to Preservation (12)' status in the list to the 'Technical Services (12)' status in the table above.



Work Order Type Statuses

Code	Name
1 ARCSAnaly	ARCS Analysis
2 ARCSCat	ARCS Cat-as-Sep
3 ARCSGP	ARCS Gov Pubs
4 ARCSGifts	ARCS Gifts/PrevAcq
5 ARCSPatron	ARCS Patron Replacement
6 ARCSPre	ARCS Pre-Bind

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!

Erin Grant: egrant2@uw.edu

Sion Romaine: sromaine@uw.edu

UNIVERSITY LIBRARIES

