

ALMA FULFILLMENT

TRAINING MANUAL

Updated August 2021

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Fulfillment Overview

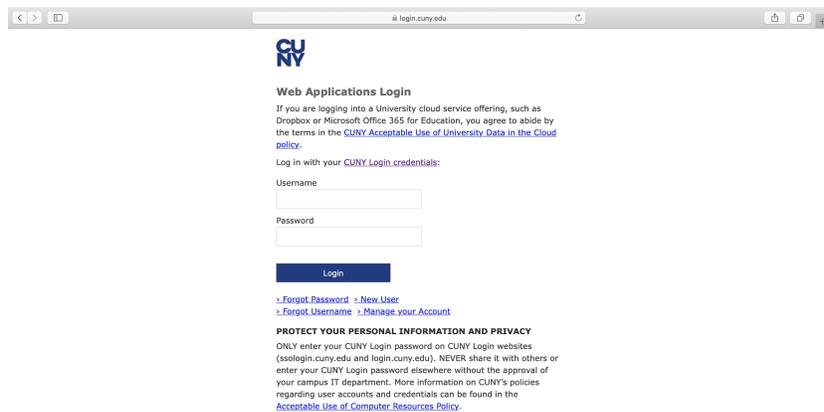
Institution = Home Campus; Network = All CUNY; Community = Electronic/Digital Resources

In Alma, the term **Fulfillment** refers to any activity that *fulfills a request*, including circulation, pick lists, stacks maintenance, routing, resource sharing, course reserves, billing, and of course, patron services.

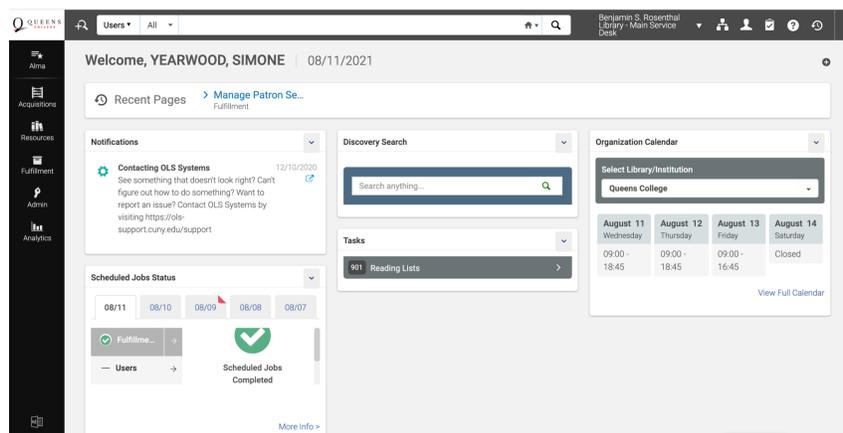
For most Fulfillment activities, **location matters** in Alma; make sure that you have the correct location set in your **Currently at** in the upper right corner. If you frequently switch between library locations or work at a shared PC with someone who does, check the box to **Always Show Current Location** so it's easy to confirm you're set to the right place for your work.

Login using your CUNY login Account Credential (Username and Password):

First Name.Last Name NN@login.cuny.edu, where "NN" is the last 2 digits of your CUNY EMPLID.



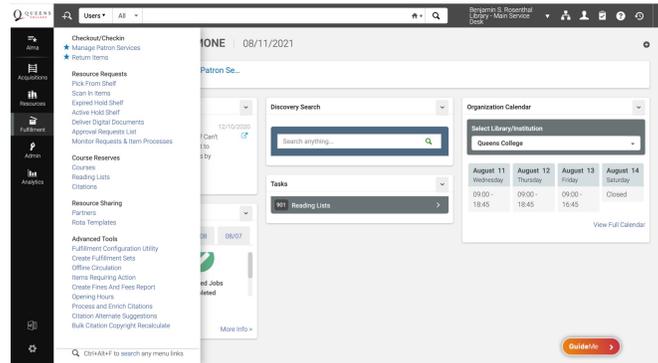
Once logged in you will see the Dashboard:



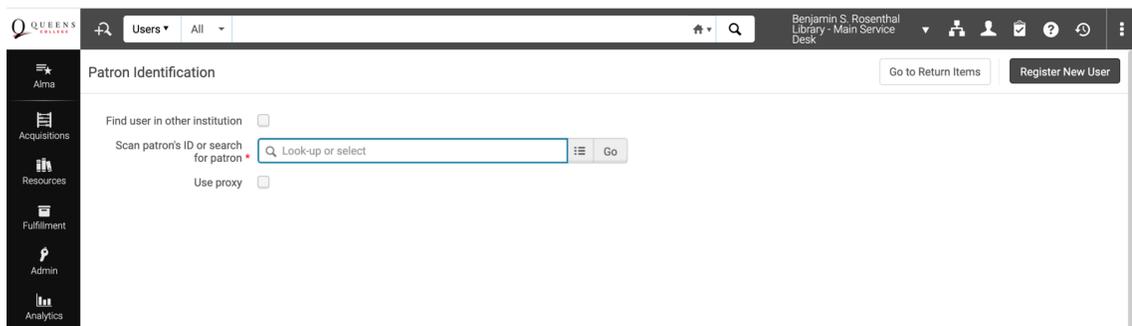
Let's begin by reviewing how to find and view a patron record. The easiest way to view a patron record is to select **Manage Patron Services** from the Fulfillment menu and scan in the patron's barcode or search by name. This will bring up the record, with a snapshot of their current status at the top and tabs for **Loans, Returns, and Requests** down below.

Create New Patron Record for Internal (Local) Users

1. Go to **Fulfillment > Checkout/Checkin > Manager Patron Services**

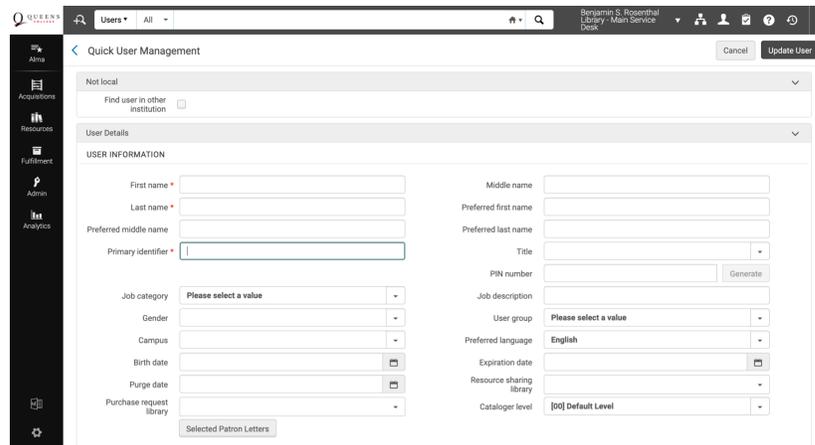


2. Click on **Register New User**



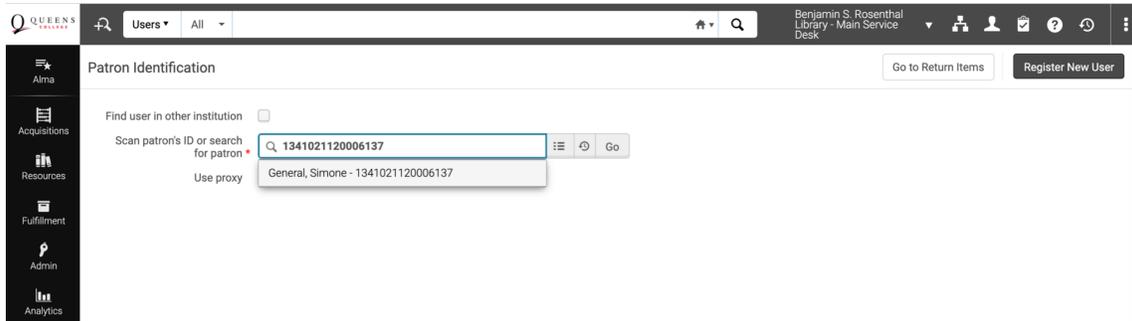
3. Fill out **New User Registration Form**; Click **Update User**

Note: Library Barcode is entered in the Primary Identifier field.



View Patron Record

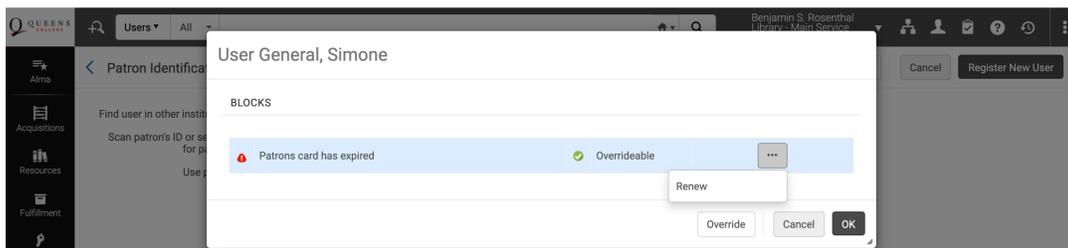
1. Go to **Fulfillment > Checkout/Checkin > Manager Patron Services**
2. Scan in the patron's barcode, or key in ID number (hit enter or click on Go).



Renew or Update an expired Patron Record

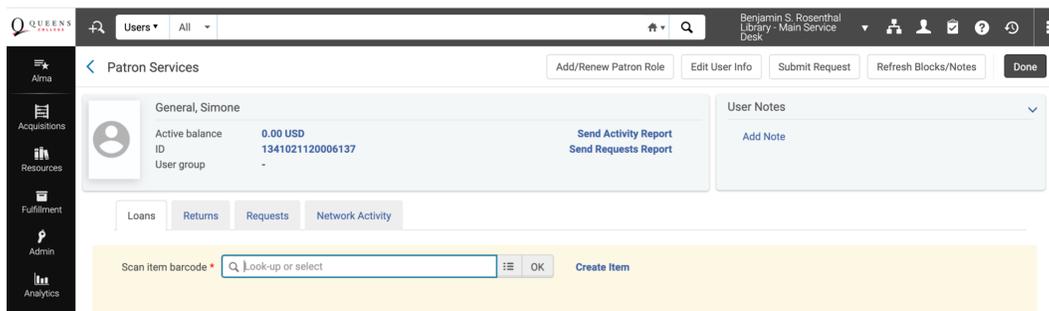
1. Scan or enter patron barcode or ID number.

Block note appears: Patrons card has expired. Click on ellipses ... then click on **Renew > OK**



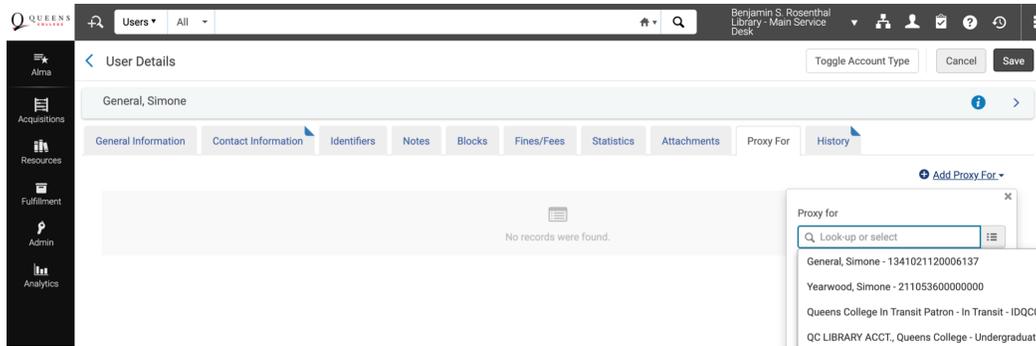
Create Proxy

1. Go to **Fulfillment > Checkout/Checkin > Manager Patron Services**
2. Scan in the patron's barcode, or key in Name
3. Click on **Edit User Information > Full Information**



4. Click on **Proxy For Tab > + Add Proxy For**

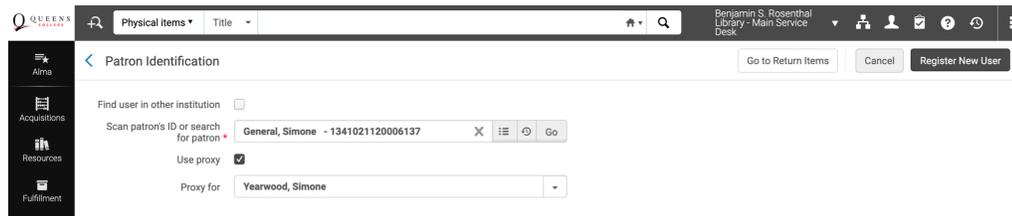
5. Search for Faculty > Click **Add User**



Loan an Item to a Sponsor via a Proxy Account

To loan an item to someone who is a proxy for a faculty member or researcher:

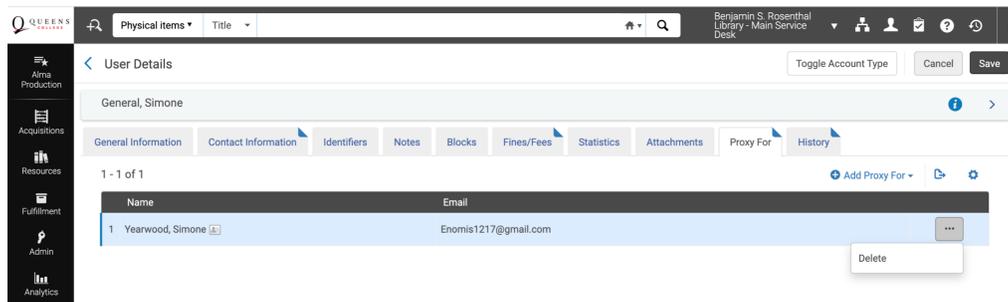
1. From the main menu, under **Fulfillment**, select **Manage Patron Services**
2. **Before you scan in the ID**, click on the box next to **Use proxy**



3. Search for the **proxy's** barcode - not the faculty/researcher
4. Select the faculty member or researcher they are acting as a proxy for and click **Go**. You see that it opens up the faculty member's account and says the proxy is by the student in front of you. Now you can loan as normal.
5. Scan the item's barcode.

Delete Proxy

1. Go to **Fulfillment > Checkout/Checkin > Manager Patron Services**
2. Scan in the patron's barcode, or key in Name
3. Click on **Edit User Information > Full Information > Proxy For tab > click on ellipses ... click Delete**



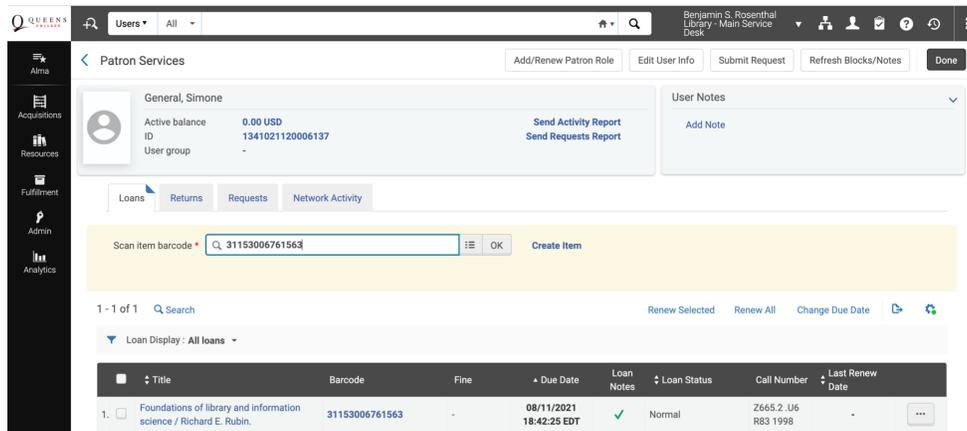
Loan an Item

To loan an item

1. Go to **Fulfillment > Checkout/Checkin > Manager Patron Services**
2. Scan in the patron's barcode, or key in Name

The **Loans** tab is selected by default

1. Scan in item barcode



- a. The **Loan Display** option will always default to **Loans of this session**, meaning it will only show items that have been loaned to the patron while you've been recently interacting with them.
- b. To see all of the patron's loans, click on the box and select **All Loans**.
- c. To loan additional items, continue scanning in barcodes.

Active Balance - Displays fines, fees or other charges

Loans Tab - Check out items or display all loans

Returns Tab - Return an item or display recent returned items

Requests Tab - Displays all requests

Network Activity - Displays all CUNY activity

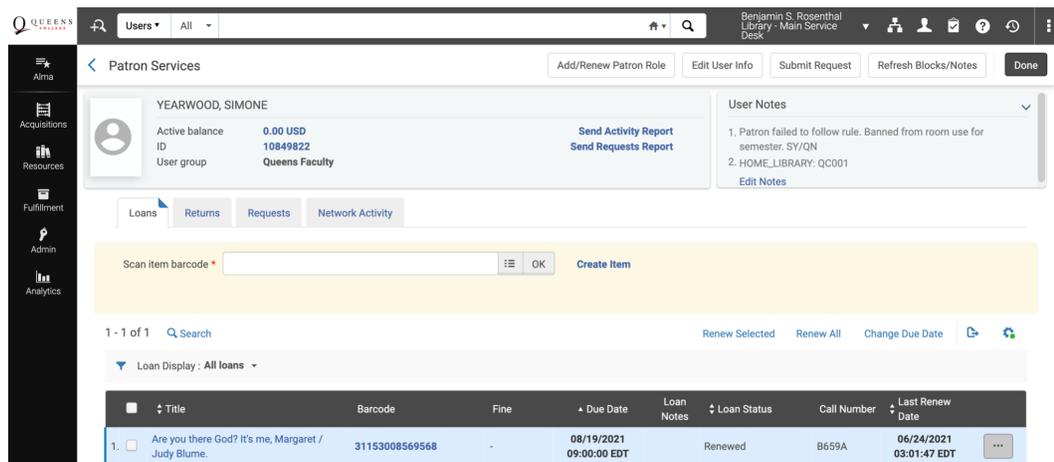
A note about the **Account Type**:

- Alma refers to external users and internal users. Perhaps counter-intuitively:
 1. **External users** are those loaded into Alma by dataload, such as students, staff, and faculty (the data came from outside, external to Alma)
 2. **Internal users** are created *within* Alma, such as our training example here, or Interlibrary Loan institutions, or some special borrowers

Renew an Item for a Patron

Patrons can renew their own items online in Primo, or staff can do this from here in Alma. To renew an item:

1. Go to the patron's record: Go to **Fulfillment > Checkout/Checkin > Manager Patron Services**
2. From the drop-down **Loan Display** menu, choose **All Loans**
3. There are three renewal choices:
 1. **Renew all loans:** Quickly renew everything on a patron's record by clicking **Renew All** above the loaned items list.
 2. **Renew individual items:** Renew a single item by clicking on the row action items button and selecting **Renew**.
 3. **Renew by changing date:** Renew or change date for specific loans by selecting their boxes on left side of list, then clicking on **Renew Selected** or **Change Due Date** at the top. If you choose **Change Due Date**, select the new due date from the calendar.



4. If an item fails to renew - for example, if the item has been requested - you will see an alert at the top of the screen and the due date will not change.

Mark an Item Claimed Return, Lost, or Found

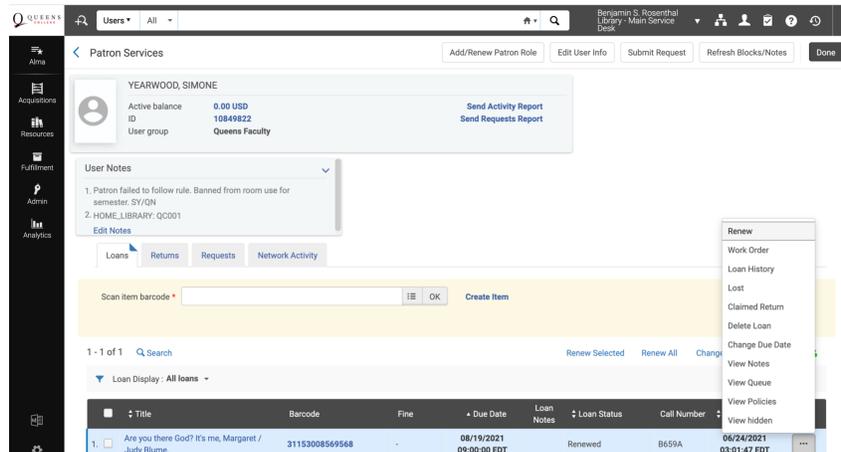
There are three additional statuses you can manually set for an item on a patron record:

- Selecting **Claimed Return** leaves the item charged to the patron's account, though not accruing fines after the date it's marked Claimed Return.
- Selecting **Lost** generates a fee for the item.
- Selecting **Found** reverses either of these.

To change these statuses:

1. Be in the patron record

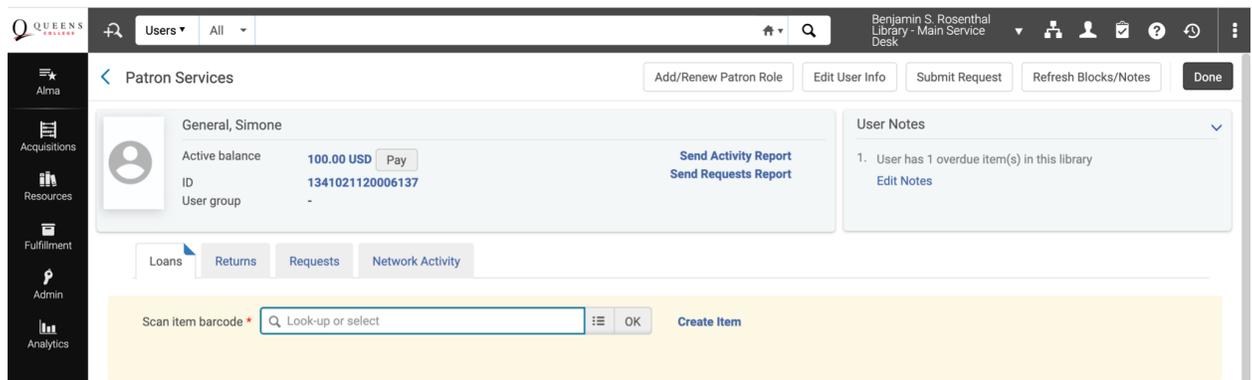
2. From the Loan Display, choose **All loans**
3. From the list, locate the item(s) the patron is claiming were returned or lost
4. Click on the ellipses ...
5. For each item, select **Claimed Return** or **Lost**. You can add a note if you need to.
 - Once an item is set to **Claimed Return**, you will see both **Lost** and **Found** as choices in the row action item list.
 - Found will return the item and eliminate any fines or fees attached.
 - Once an item is set to **Lost**, you will only see **Found Item** as an option.



Pay a Fine

To pay fines:

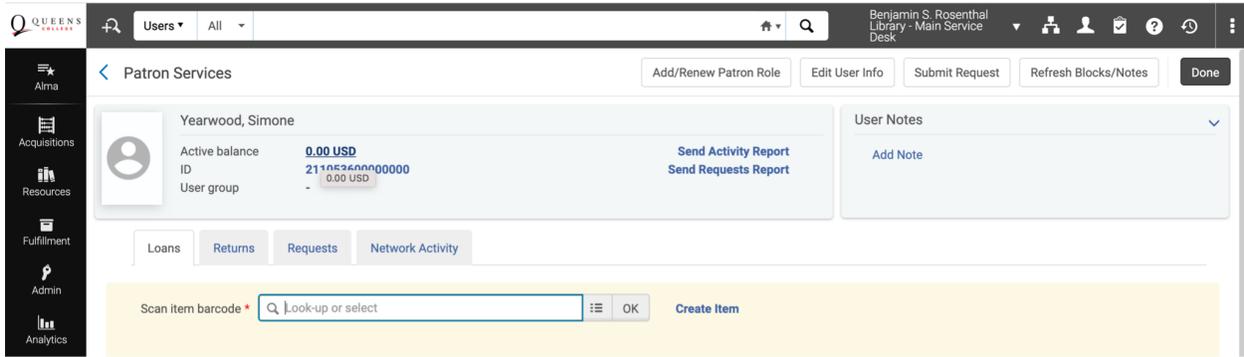
1. From the main menu, select **Fulfillment > Checkout/Checkin > Manage Patron Services**
2. Scan patron barcode or enter ID number



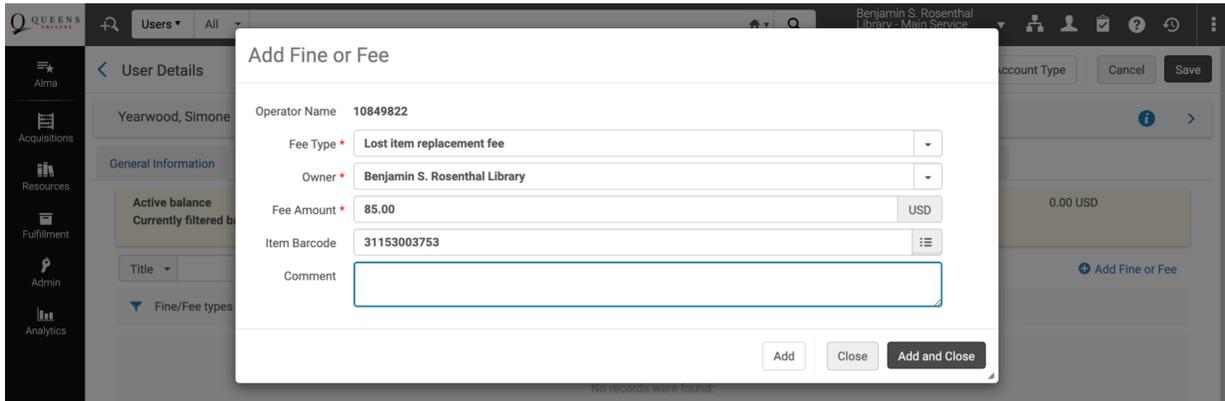
3. On **Active Balance**, click on **Pay**
4. Click on **Send**
5. Are you sure you want to pay USD?, click **Confirm**

To Add a fine or fee:

1. Click on **Active Balance**



2. Add Fee Type > Fee Amount > Barcode (if any) > Comment > Click **Add and Close**

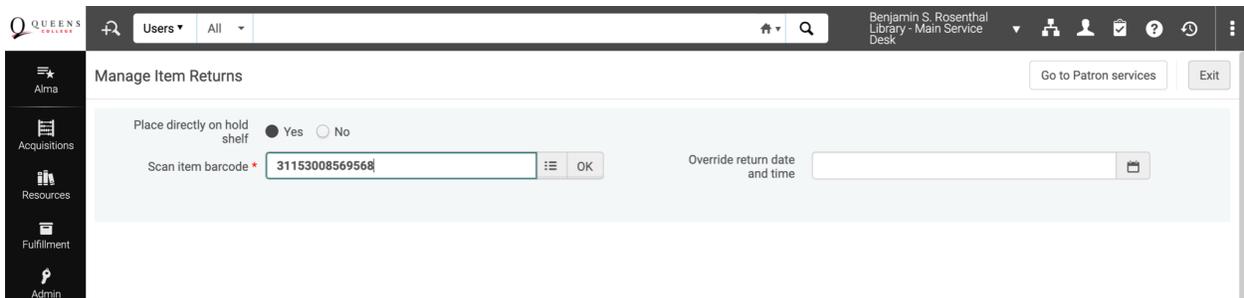


Note on Fine or Fee: Be mindful that any comments will be viewable by the patron.

Return an Item

To return items:

1. From the main menu, select **Fulfillment > Checkout/Checkin > Return Items**
2. Scan in the barcodes into the **Returns** field



A quick note on notifications: Overdue notices, fine notices, etc.

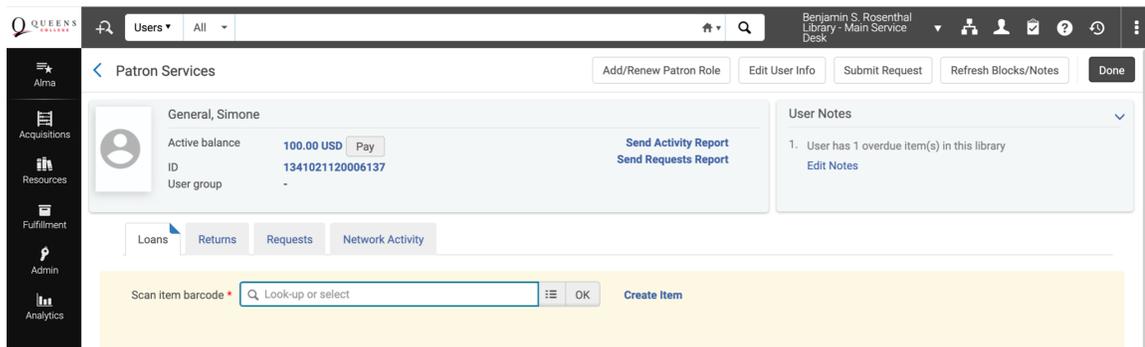
Patrons will receive notifications about hold requests, overdue items, lost bills, and others automatically from the system as they're processed. For some activities, such as cancelling a request, staff have the option not to notify the user if it's not necessary. All you have to do is unclick the **Notify user** box.

Loan an Item That Has No Barcode (aka Create Item)

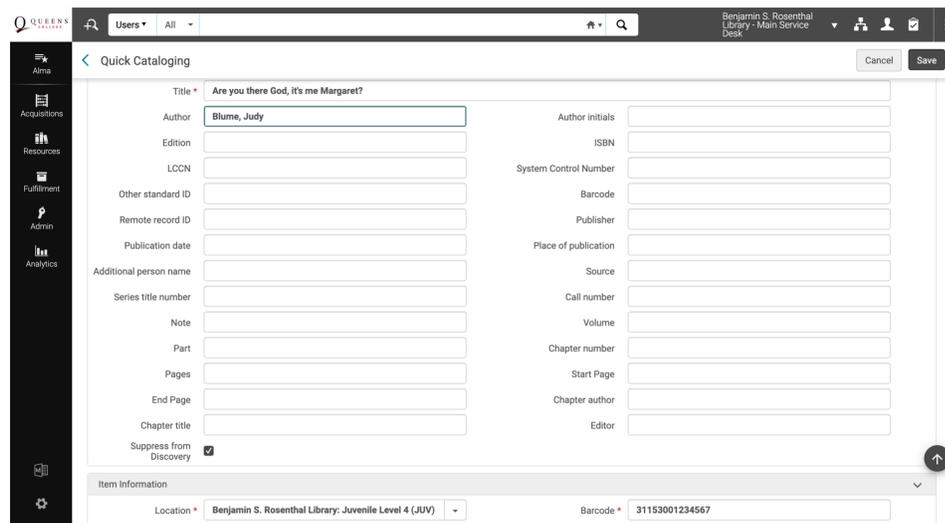
If a patron presents an item to borrow that is not in the system, you can create an 'on-the-fly' item to loan the material now. Item records created on the fly will be reviewed when they are returned; a request is placed on the item to send it to Technical Services or Cataloging.

To loan an item that's not in the system or has no barcode from the patron record:

1. Click on **Create item** to the right of the **Scan Barcode** field



2. Select the **Holdings Type**.
 1. **Best Practice:** Use "New" even when circulating an accessioned item because it's faster and easier. The item is going to be flagged so that the record will be updated once the item is returned.
3. Choose **Citation Type: Book** even if it's not a book. You can add details on the next screen.
4. Then click on **Choose** to open the form.



5. On the **Quick Cataloging Screen**, enter as much information about the item as possible.

1. You must add a **Title**.
2. **Author**.
3. Leave the box next to **Suppress from Discovery** checked. This will keep this temporary item from being searchable or findable in the public catalog.
6. In the **Item Information** section, you must fill out everything in here except the Public Note.
 1. First, choose your **Location**, whenever you're circulating this from, and you can choose the **Collection** if needed.
 2. Click off of that to let it update and you can now enter the **barcode**.
 3. Choose the **Material Type**, and here's where you can be specific to what the actual item type is.
 4. Choose your **Item Policy** (or your loan policy). We'll go with a standard Regular Loan.
 5. You could add a Public Note if you needed to.
7. Click **Save**

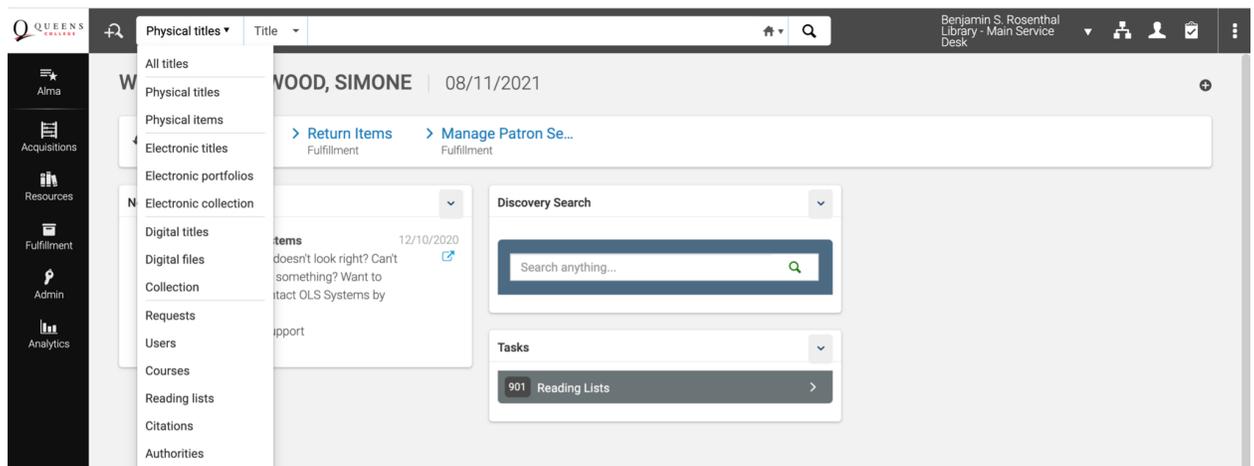
The item has been loaned according to the Item policy entered and the patron's status, with the title and barcode that was entered.

Institution-Level (Hold) Requests

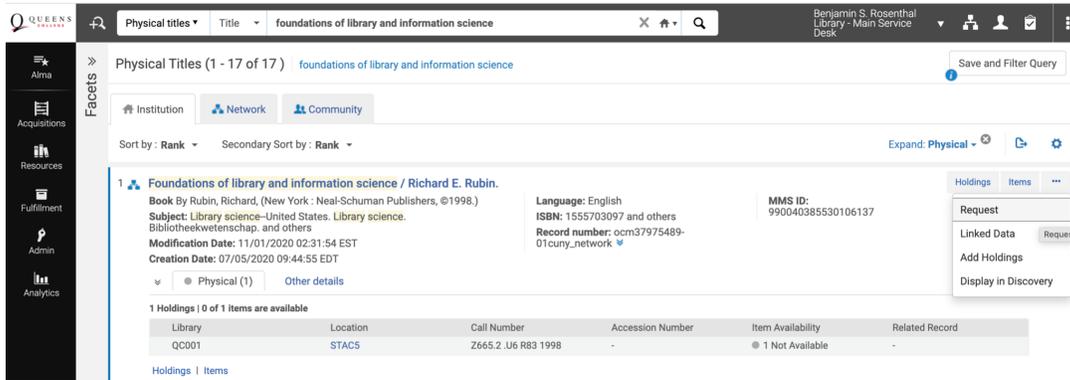
As with renewals, patrons can request materials directly through the public catalog, but staff helping them find materials can also place requests directly through Alma.

The default patron request is set to the Title (or bibliographic) record level. To request a title:

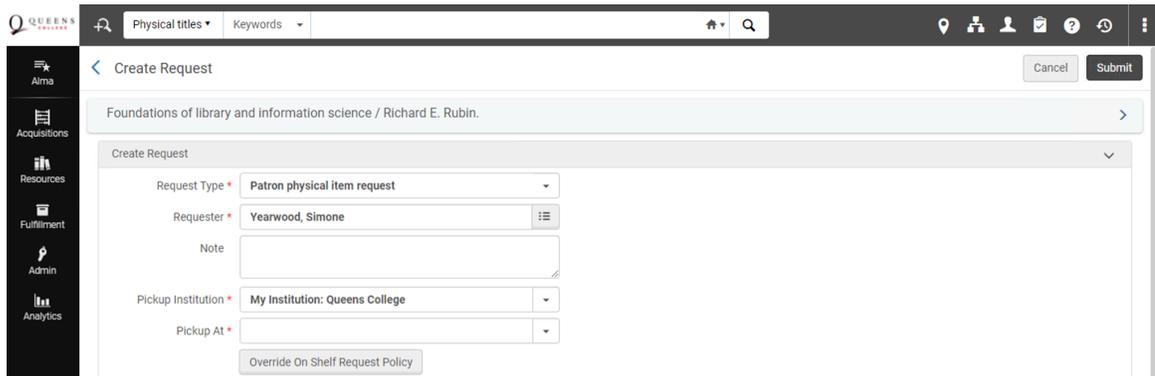
1. Use the **Physical Titles** search in the persistent search bar to find the title that the patron wants.
2. Search for the title and hit Enter.



3. Locate the title, **Click** on ellipses ...
4. Click on **Request**, which will either be a hot button or under the row action item list icon.



- For the **Request Type**, choose **Patron physical item request**. The page will refresh to show the context-dependent options for this request type.
- Scan the patron's barcode in the **Requester** field or enter by patron name. Give the system a moment to find them.



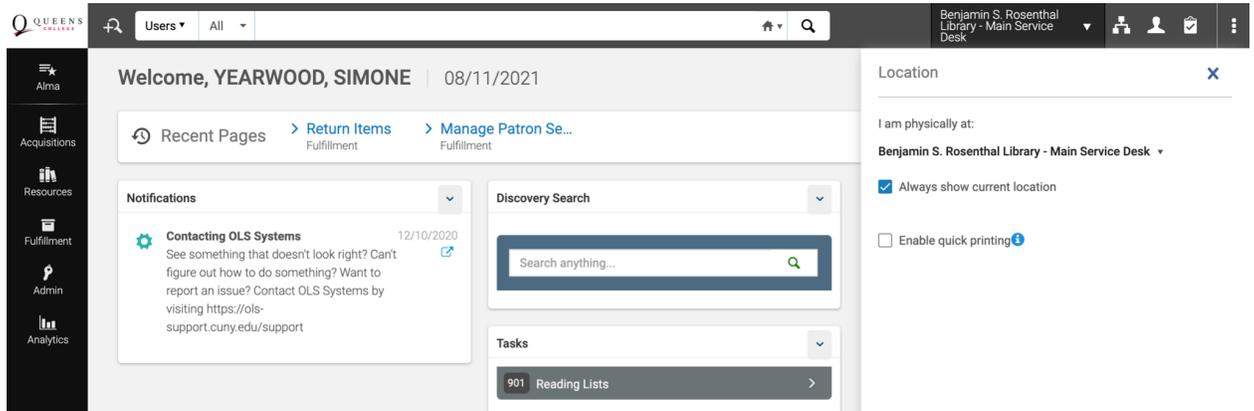
- Choose the **Pick-up Location** that the patron wants; their preferred location or locations will be at the top.
- If needed, add additional information at the bottom, such as **Material Type**, **Date Needed By**, or a different **Loan Period** if it's available.
- When you're done, click **Submit** in the upper right corner.

At this point, the request will appear on the patron's record on the Requests tab, and you can search for this request using the persistent search bar and the criteria for the Requests search type.

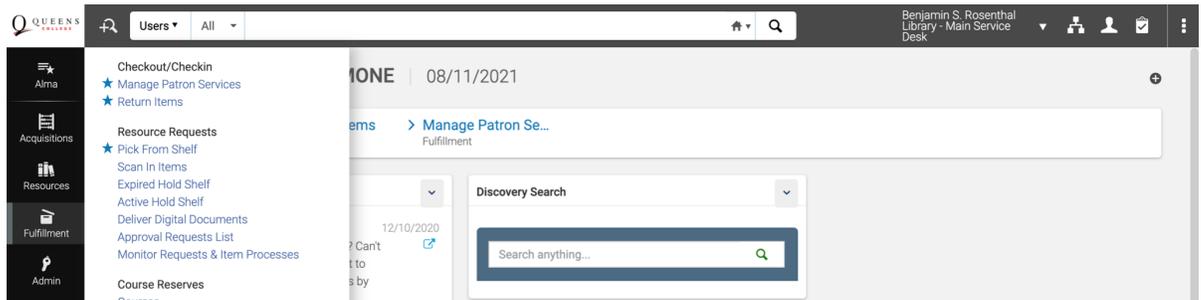
Pick Lists and Hold Shelf Lists (CLICS Requests)

The Pick List is the list that staff or students use to pull requested items from the shelves. To view the pick list for your location:

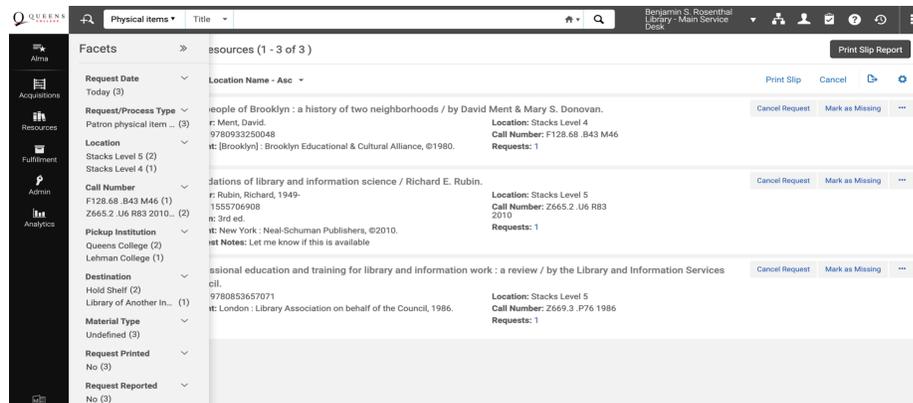
1. Make sure your **Currently At** is set to the proper location.



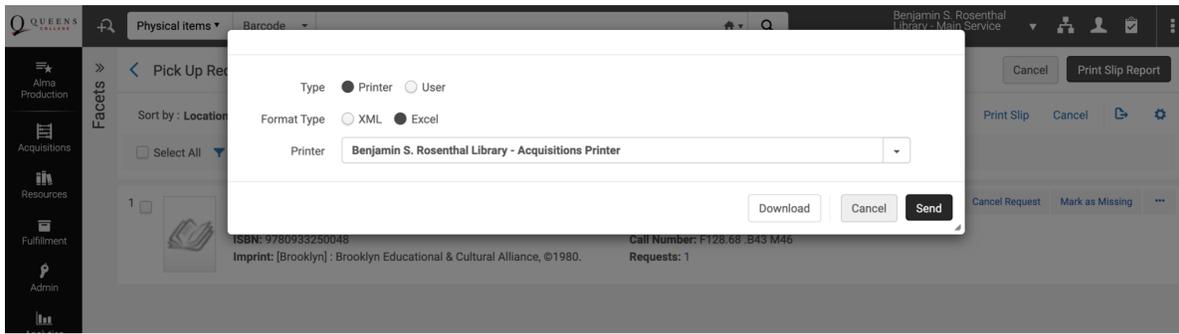
2. Go to **Fulfillment**, then under **Resource Requests**, click on **Pick From Shelf**.



3. The pick list will open, and you can use the facets on the left to limit it as needed:
 1. **Request Date** and **Request Type**
 2. The collection **Location** and **Call Number** ranges, which may make it easier to print out segments of the list for different staff to walk the shelves.
 3. The **Destination** for the requested item, including the library's own Hold shelf and internal reshelving.



To print the pick list, click on **Print Slip Report** in the upper right column and follow local unit instructions on printing.



From the pick list, you can also take actions on the requests:

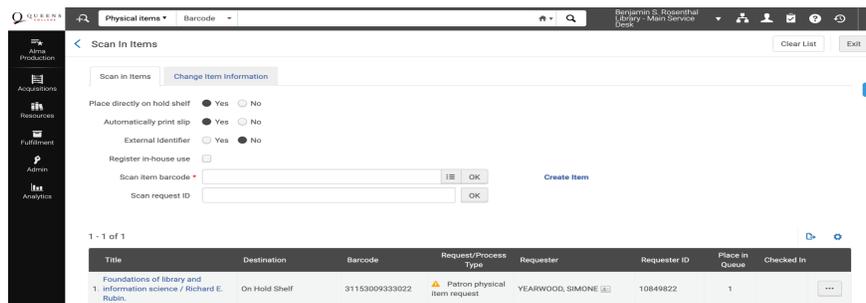
You can **Cancel** a request: choose a reason from the drop-down, add a note to the patron, and choose whether to notify the patron of the cancellation or not.

Skip Location will allow the request to move on to another location, if you can't find the item but aren't sure it's actually missing or just mis-shelved, or if the item is found but is damaged.

Under the row action items list, **Mark as Missing** will mark the item missing, and then the request will move on to another library. Note that this will mark all items on your holdings record that had a status of *Item in Place as Missing*; any items not currently in place will not change. In other words, it assumes that if *one* item on the holdings at your location is missing, then *all* of the items are missing because any of them could have filled this request.

Edit the request if needed, or update the request **Expiry Date**.

Scanning in Available Requests

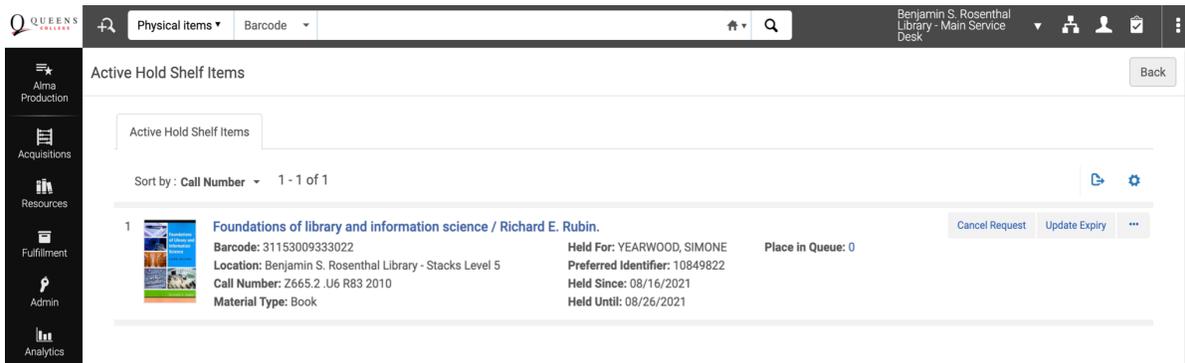


1. Click **Yes** for Place directly on hold shelf and Automatically print slip.
2. Scan or type in the item barcode in the Scan item barcode* box and click OK

Note that as items are scanned in to fulfill requests, they will disappear from the pick list – staff can review the list periodically to see what's left to be found.

Hold Shelf Lists

To view the hold shelf lists, go to either **Active** or **Expired Hold Shelf** under the **Fulfillment** menu.



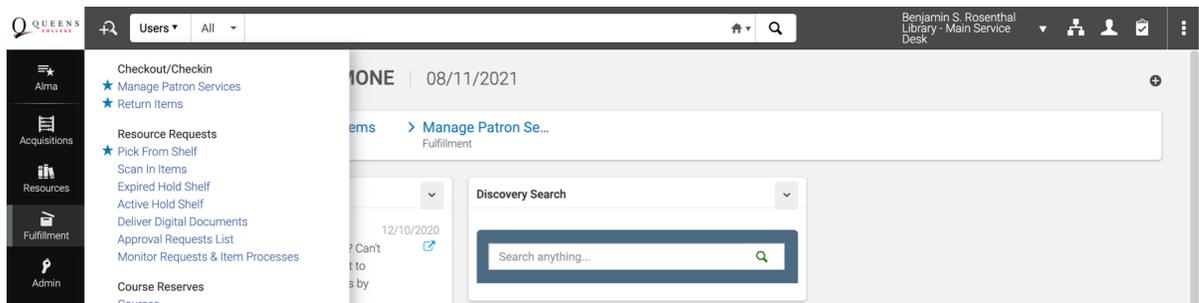
The **Active Hold Shelf** displays active holds at your location, sortable by requester, title, hold start or expiration date, call number, etc. You can manage each hold from the row action item list in that row.

- **Cancel** the request, and allow the item to go in transit back to its owning library or on to fill another request.
- **Update the request Expiry** date to extend the hold.
- **Mark the item as Missing** if staff went to retrieve it from the hold shelf and it can't be found by clicking on ellipses ...

Monitor Requests & Item Processes

This page provides updated information on the various types of resource requests, and their progression within Alma.

Go to **Fulfillment**, then under **Resource Requests**, click on **Monitor Requests & Item Processes**



Click on **Facets** to open options

The screenshot displays the Alma library system interface. At the top, there is a navigation bar with the 'QUEENS COLLEGE' logo, a search bar, and the user's name 'Benjamin S. Rosenthal Library - Main Service Desk'. Below the navigation bar, the main content area is titled 'Facets' and 'Monitoring (1 - 20 of 152)'. On the left side, there is a sidebar menu with various navigation options: Alma Production, Acquisitions, Resources, Fulfillment, Admin, and Analytics. The main content area shows a list of request details, including 'Type', 'Material Type', 'Workflow Step', 'Request/Process Type', and 'Request Date'. Each request entry includes a title, a 'Type' (Patron physical item request), a 'Place in Queue' (1), and a 'Request Date'. There are also buttons for 'Cancel', 'Edit', and a menu icon for each request.

On this page, you can:

- View the history of the request
- Cancel the request
- Extend the request to a later time or date
- Mark the item as missing
- Print a call slip for the item before going to look for the item

Fulfillment Tasks (included personal experiences of what can/can't be done w your login at bottom of document)

If you haven't already, work through each of the tasks below to practice using Alma. This practice is the best way to learn the system – by using it!

1. Find and view your own patron record using Manage Patron Services
2. Check an item out to yourself.
3. Manually change the due date or renew an existing item if possible.
4. Make the new item you checked out to yourself Claimed Returned, then Found, then Lost, then Found.
5. Return the new item.
6. Give yourself a fine and “pay” it.
7. Loan a Quick Cataloging item to yourself and return it.
8. Search for a Physical Title at your institution and request it.
9. Go to the Pick List for your institution and view your request there, then go to Monitor Requests and Item Processes list and view it there. Compare what you can do with the request in each place.
10. Process the Pick List request for that item, then view it on the Active Hold Shelf. Update Expiry (hold expiration date) so it shows up on the Expired Hold Shelf list. View the expired hold there.