

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.

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Web Applications Login
If you are logging into a University doud service offering, such as Dropbox of Moustol (fine 345 for discuston), you agree to able by the terms in the CUNY Acceptable Use of University Data in the Cloud policy.
Log in with your <u>CUNY Login credentials</u> : Usemame
Password
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Forgot Dessword 2. New User Forgot Username - Manage your Account
PROTECT YOUR PERSONAL INFORMATION AND PRIVACY
ONLY enter your CLINY Login password on CLINY Login websites (stoologin.cury void and login.curve, which NVER's starts at with others or enter your CLINY Login password sitewhere without the approval of your campus IT department. New Information on CLINY's policies regarding user accounts and credentials can be found in the Accessible User of Computer Resource Pelicy.

Once logged in you will see the Dashboard:

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Contacting OLS Systems See something that doesn't look right? Can't figure out how to do something? Want to report an issue? Contact OLS Systems by	2/10/2020	٩	Select Library	/Institution		×
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08/11 08/10 08/09 08/08	08/07				vi	ew Full Calenda
⊘ Fulfilime →						
— Users → Scheduled Job Completed						
	More Info >					

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

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 Image: Amage: A
- 1. Go to Fulfillment > Checkout/Checkin> Manager Patron Services

2. Click on Register New User

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≕ ★ Alma	Patron Identification							Go to	Return Item	IS	Register	New Use	r
Acquisitions	Find user in other institution Scan patron's ID or search for patron *	Q Look-up or select	:=	Go									
Resources	Use proxy												
P Admin													
Analytics													

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

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

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1	Purchase request library			Cataloger leve	[00] Default Level			*	
		Selected Patron Letters							

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).

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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

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Resources	for participation of the second	Patrons card has expired	Overrideable				
E Fulfillment			Renew				
۶			Overrie	de Cancel 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

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

5. Search for Faculty > Click Add User

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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

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- 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

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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

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- 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

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.

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	1. 🗌	Are you there God? It's me, Margaret / Judy Blume.	31153008569568	-	08/19/2021 09:00:00 EDT	F	Renewed	B659A	06/24/2021 03:01:47 EDT		·

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.

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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

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- 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

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

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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

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≕ ★ Alma	Manage Item Returns				Go to Patron services	Exit
Acquisitions Resources	Place directly on hold shelf Scan item barcode *	● Yes ○ No 31153008569568 :≣ OK	Override return date and time		8	
Fulfillment P Admin						

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

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Acquisitions	8	Active balance 100.00 USD Pay ID 1341021120006137 User group -	Send Activity Report Send Requests Report	1. User has 1 overdue item(s) in this library Edit Notes	
Fulfillment 9 Admin	Loa	Returns Requests Network Activity			_
Analytics	Scan	item barcode * Q Look-up or select IE	OK Create Item		

- 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.

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P Admin	Remote record ID		Publisher		
lta.	Publication date		Place of publication		
Analytics	Additional person name		Source		
	Series title number		Call number		
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	Part		Chapter number		
	Pages		Start Page		
	End Page		Chapter author		
	Chapter title		Editor		
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¢	Location *	Benjamin S. Rosenthal Library: Juvenile Level 4 (JUV) 🗸	Barcode *	31153001234567	

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.

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

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9 Admin		Note									
		Pickup Institution	* My Institution: Queens College	•							
Analytics		Pickup At	*	-							
			Override On Shelf Request Policy								

- 7. Choose the **Pick-up Location** that the patron wants; their preferred location or locations will be at the top.
- 8. If needed, add additional information at the bottom, such as **Material Type, Date Needed By**, or a different **Loan Period** if it's available.
- 9. 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.

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.

QUEENS	+ Users▼ All ▼			ŧ۲	٩	Benjamin S. Rosenthal Library - Main Service Desk	Å	Ŧ	2	:
≕ ★ Alma	Checkout/Checkin Manage Patron Services Return Items	10NE 08/1	1/2021						0	
Acquisitions	Resource Requests	ems > Mana Fulfillmo	ge Patron Se ent							
Resources	Scan In Items Expired Hold Shelf Active Hold Shelf	~	Discovery Search		~					
Fulfillment	Deliver Digital Documents Approval Requests List Monitor Requests & Item Processes	12/10/2020 ? Can't C	Search anything	c	ι					
Admin	Course Reserves	s by								

- 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.

Queens	Physical items •	Title	, v	÷.	٩	Benjamin S. Rosenthal Library - Main Service Desk	- <i>6</i>	۰ ۱	Ê (9	:
≕ ★ Alma	Facets	»	esources (1 - 3 of 3)						Print	Slip Rep	ort
	Request Date Today (3)	~	Location Name - Asc 👻				Prir	nt Slip	Cancel	₽	۰
Resources Tutfilment	Request/Process Type Patron physical item Location Stacks Level 5 (2)	(3)	eople of Brooklyn : a history of two neighborhoods / by Davi r: Ment, David. 9780932520048 tt: [Brooklyn] : Brooklyn Educational & Cultural Alliance, ©1980.	d Ment & Mary S. Dono Location: Stacks Level 4 Call Number: F128.68 .8 Requests: 1	wan. 4 843 M46		Cance	I Request	Mark as I	Aissing	
۶ Admin Linu Analytics	Stacks Level 4 (1) Call Number F128.68 .B43 M46 (1) Z665.2 .U6 R83 2010 Pickup Institution Queens College (2)	(2)	lations of library and information science / Richard E. Rubin, IF Rubin, Richard, 1949- 1555706008 12 Yord d. 14 New York: Neal-Schuman Publishers, @2010. 16 Hotes: Let me know if this Is available	Location: Stacks Level 3 Call Number: Z665.2 .U 2010 Requests: 1	5 16 R83		Cance	l Request	Mark as I	Aissing	
	Lehman College (1) Destination Hold Shelf (2) Library of Another In Material Type Undefined (3)	(1)	ssional education and training for library and information we cil. 9780853657071 It: London : Library Association on behalf of the Council, 1986.	rk : a review / by the Li Location: Stacks Level 5 Call Number: Z669.3 .P Requests: 1	ibrary and 5 76 1986	d Information Services	Cance	l Request	Mark as I	Aissing	
œA	Request Printed No (3) Request Reported No (3)	~									

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

QUEENS	A Physical items * Barcode *			n, Q	lenjamin S. Rosenthal ibrary - Main Service lesk	• Å	1 8 0	@ !
Alma Production	< Scan In Items						Clear List	Exit
Acquisitions	Scan in Items Change Item Information							
Resources	Place directly on hold shelf • Yes · No Automatically print slip • Yes · No							
Fulfilment	External Identifier 💿 Yes 🔹 No							
Admin	Register in-house use Scan item barcode •		і≣ ок	Create Item				
Analytics	Scan request ID		ОК					
	1 - 1 of 1						D	•
	Title Destination	Barcode	Request/Process Type	Requester	Requester ID	Place in Queue	Checked In	
	Foundations of library and 1. information science / Richard E. On Hold Shel Rubin.	if 31153009333022	Patron physical tem request	YEARWOOD, SIMONE 🛓	10849822	1	·	••

- 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.

QUEENS	÷7,	Physical items	• Barcode	-				ŧ۲	٩		Benjamin Library - I Desk	n S. Rosenthal Main Service		Å,	ł	2	:
≕ ★ Alma Production	Activ	ve Hold Shelf	tems													Back	
Acquisitions		Active Hold She	If Items														
IN Resources		Sort by : Call Number 👻 1 - 1 of 1										C	\$	•			
E Fulfillment		1	Foundations Barcode: 3115	of library and info 3009333022	ormation science /	Richard E.	Rubin. Held For: YEARWOOD, S	SIMONE	Place	e in Queue: 0		Cancel Reques	at U	lpdate Expi	iry		
P Admin			Location: Benj Call Number: 2 Material Type:	amin S. Rosenthal Li 2665.2 .U6 R83 2010 : Book	ibrary - Stacks Level 5)	5	Preferred Identifier: 108 Held Since: 08/16/2021 Held Until: 08/26/2021	349822									
Analytics																	

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

QUEENS	Requests •	All 👻			٩	Benjamin S. Rosenthal Library - Main Service Desk	• i	1	. 🖍	?	Ð	:
≕ ★ Alma Production	Facets	»	onitoring (1 - 20 of 152)									
	Type										C+	•
Acquisitions	In Process (7)		re - Include Pending Resource Sharing Requests	: Yes 👻 Clear all								
Resources	Material Type		izing methodologies - research and indigenous	s naonlas /					С	ancel	Edit	
	Book (136)		Type: Patron physical item request	Place in Queue: 1								
Fulfillment	Laptop Accessory (4	l)	System 🔊	Request Date: 08/12/2020								
P Admin	+ More (3)		r: MUKHERJEE, ROOPALI									
1.1	Workflow Step On Hold Shelf (1)		dentifier: 773206710006137									
Analytics	Transit Item (146) Undefined (5)		izing methodologies : research and indigenou	s peoples /					C	ancel	Edit	•••
	Request/Process Ty	pe	18620006137	Request Date: 08/13/2020								
	Acquisition technic Patron physical ite	. (7) (9)	system 💵 #: MUKHERJEE, ROOPALI 🔊									
	Transit For Resh (136	136)	cation: Benjamin S. Rosenthal Library dentifier: 773408520006137									
	Request Date Today (7)		119 handbook of policies and procedures (C	ancel	Edit	
	Yesterday (12) Up to three days a	(23)	Type: Patron physical item request 5340006137	Place in Queue: 1 Request Date: 08/14/2020							Lun	

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.