Alma Fulfillment Basics for Graduate Assistants

Central Access Services
University Library

Business Hours: 217-333-8400
Nights and Weekends: 217-244-0732
circlib@library.illinois.edu

This handy guide will introduce you to circulation tasks in Alma, the cloud-based integrated library system used by the University Library. Basic circulation tasks are covered here, but your unit library will provide further training as to their specific procedures.

Click any entry in the Table of Contents below to navigate directly to that section of the guide.

Table of Contents

General Circulation Policies 3
- Loan Periods 3
- Requests 4
  - Other Unit Libraries on Campus 4
  - I-Share 4
  - Campus Mail 5
- User Accounts, Library cards, and User Blocks 5
  - User Accounts in Alma 5
  - Library Cards 6
  - User Blocks 6

Fulfillment Procedures in Alma 7
- Loan Items to a Local Patron 7
- Loan Items to a Proxy Patron 12
- Renewing items 17
- Returning items 21

Placing Requests 26
- Requesting Local Items on a Patron's Behalf 26
- Requesting I-Share Items on a Patron's Behalf 38

Library Terms in Frequent Use at the University Library 43

Helpful Links 46

General Circulation Policies

Circulation policies vary can vary across campus library locations. In addition to location, the way that an item circulates can also depend on the borrowing patron's user group as well as any additional item policy that may be applied to it. These factors impact whether an item can or cannot be requested, checked out, or renewed, as well as the item's initial due date.

This section gives an overview of loan periods, requesting, and user accounts. You can find additional information about borrowing using these links:

Borrowing Services Overview

Standard Loan Periods Chart

Loan Periods

- Most items circulate for 16 or 4 weeks depending on the patron's affiliation
  - Faculty, Emeritus Faculty, Academic Employee, and Graduate patrons can check most items out for 16 weeks.
  - Undergraduate, Support Staff, Retired Staff, and Courtesy Card patrons can check most items out for 4 weeks.
  - Most patrons will be able to renew these items 10 times.

- Most I-Share items (both those lent from our Library to another I-Share institution's patron and those borrowed by our patrons from another I-Share institution) circulate for 4 weeks.
  - All users who are eligible for I-Share borrowing can renew I-Share items up to 3 times
  - I-Share borrowing is not available to courtesy card patrons

- Some Journals/Serials at departmental libraries circulate for 2 weeks or for use in the building depending on the patron's affiliation

    - Faculty, Emeritus Faculty, Academic Employee, and Graduate patrons can check these items out for 2 weeks.
    - Undergraduate, Support Staff, Retired Staff, and Courtesy Card patrons can check these items for 2 hours to use in the building.
    - Most patrons will be able to renew these items 10 times.

- Some notable collections that operate outside of these loan periods are:
    - Some media collections with items like DVDs, video games, or board games
    - Loanable Technology items like charging cords, laptops, and cameras
    - Music and Performing Arts Library CDs
    - University High School Library items

Requests

When patrons request items, they may be requesting them from many different locations and can choose to receive the items at many different locations. Items requested to or from different locations may take different amounts of time to arrive.

Other Unit Libraries on Campus

There are many different unit Libraries locations on campus, and items can be sent from one Library to another Library for pickup.

- Items usually arrive within 1-2 business days
- No weekend deliveries

I-Share

We're a part of a consortium of 90+ universities and research institutions in Illinois called I-Share. Patrons can request items from I-Share institutions for pickup at a Library location here at Illinois.

- Items usually arrive within 4-7 business days
- No deliveries on weekends

- There are many I-Share libraries in the Champaign-Urbana area (e.g., Parkland College), so I-Share patrons may request to pick up items here instead of their home campus

Campus Mail

Faculty, emeritus faculty, staff, and graduate students who have an office on campus can request for Library items to be delivered to their campus address.

- Items usually arrive within 8-10 business days
- No deliveries on weekends
- Not available to Undergraduate Students
- Items are not mailed to patrons' home address. Items are delivered only to campus mailrooms.
- Items must be returned in person or to a bookdrop. Items cannot be returned through Campus Mail.

User Accounts, Library cards, and User Blocks

User Accounts in Alma

- User accounts update regularly in Alma, pulling information from university records.
- If a patron has a very new i-card, it may not have been added in Alma yet. If scanning a patron's i-card doesn't pull up the user's record, follow these steps:

    - If it's Monday-Friday 8:30am-5pm, call the Library Phone Center first (217-333-8400). Let them know that you need to activate a patron's i-card.
    - If it's a weekend or evening **or** if you're unable to reach anyone in the Library Phone Center, call the Main Circulation desk (217-244-0732). Let them know that you need to activate a patron's i-card.
    - If you're unable to reach someone at either number, fill out a BIOK form (https://www.library.illinois.edu/staff/cas/ under **Reporting Forms**).
- Please refer any other issues with a user account to Central Access Services.

Library Cards

Patrons must present a valid, unexpired Library card to request Fulfillment transactions (e.g., placing requests, checking out items, requesting information about items checked out to their account) at a circulation desk. It is University Library policy that Library staff **may not** accept a patron's name or Library Number provided verbally in absence of a library borrowing card under any circumstances.

IDs that are valid to be used at the University Library:

- i-cards (either physical i-cards or their digital Library card available through the Illinois App)
- Courtesy Cards
- IDs from the patron's I-Share institution (e.g., an Illinois State University ID card)

IDs that are not valid to be used at the University Library:

- Public library cards
- Driver's Licenses
- Name/ID number given by patrons verbally

User Blocks

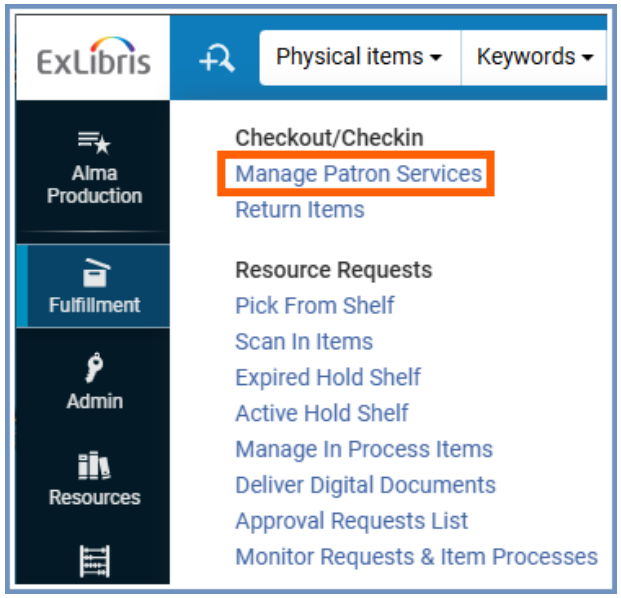
Patrons may be blocked from borrowing materials due to lost materials or fines. **Do not override patron blocks.** Follow your unit's procedure for referring patrons with blocks or, if needed, direct patron to the Central Access Services to address the block.

Fulfillment Procedures in Alma

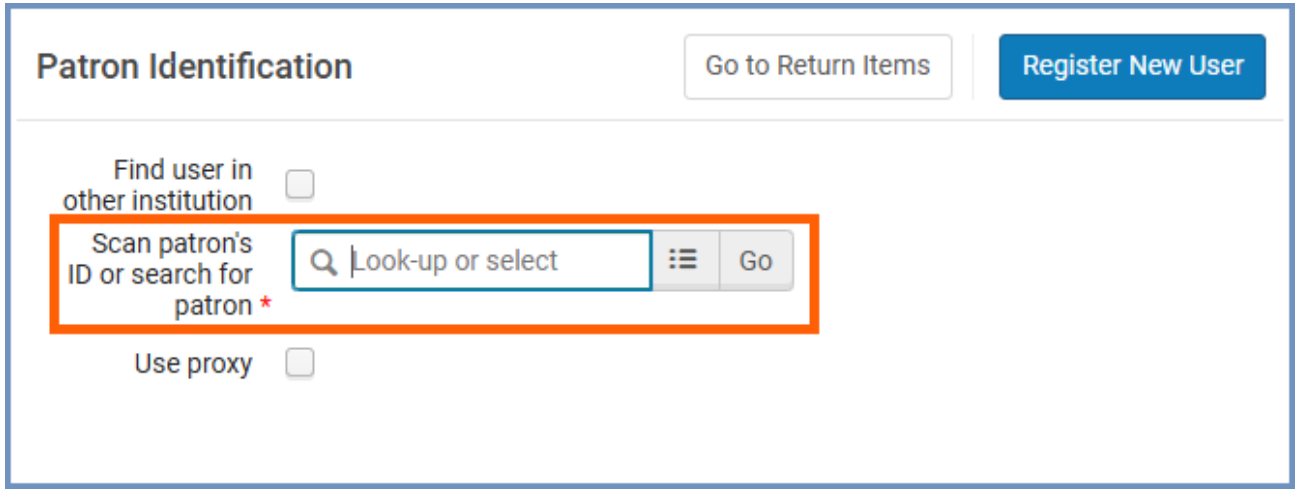
This section outlines a few of the most common Fulfillment tasks you'll perform in Alma. Your unit library may provide further training to complete additional tasks. You can also visit the Library's Alma Training page to find more training documentation.

Loan Items to a Local Patron

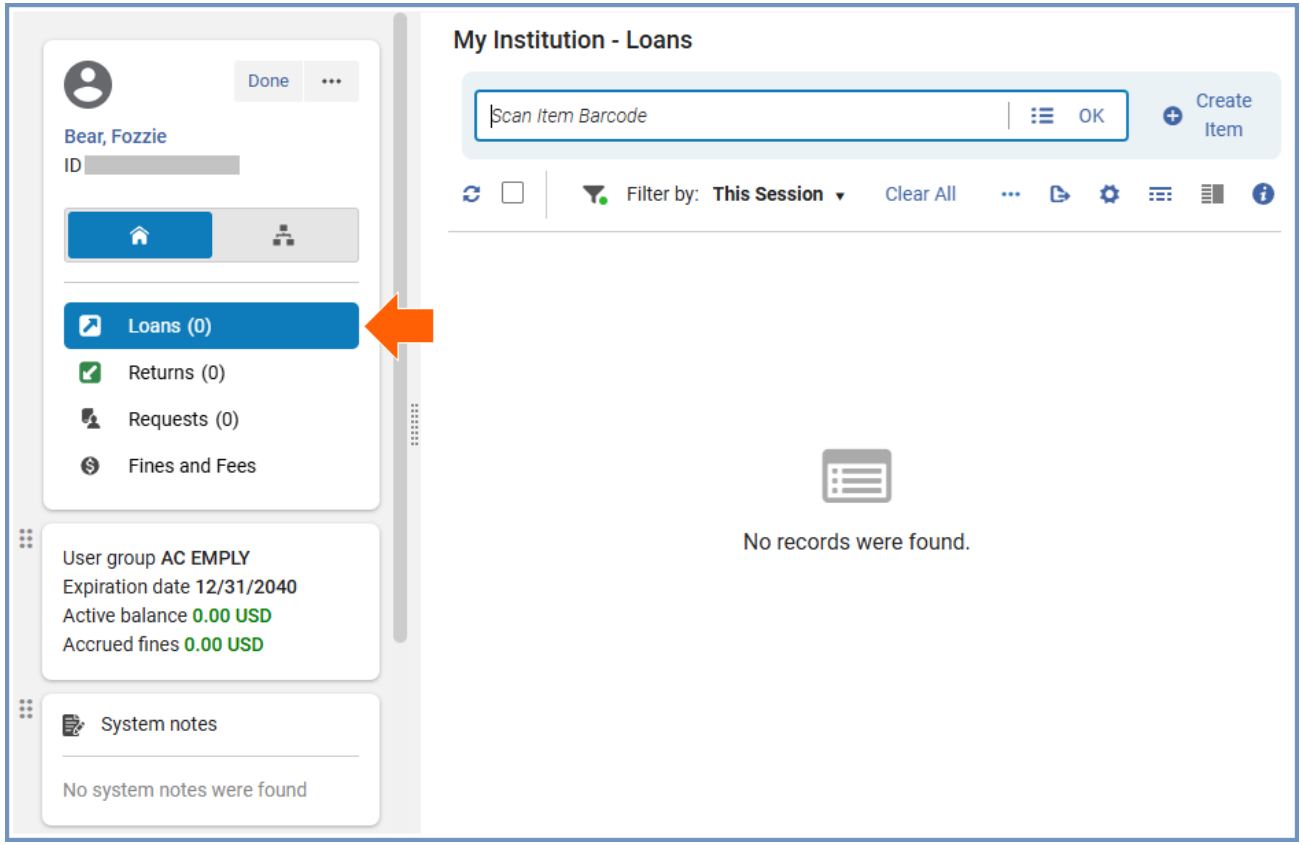
1. Open the **Fulfillment** menu and select **Manage Patron Services**.



2. Scan the patron's i-card, courtesy card, or Illinois app in the **Scan patron's ID or search for patron** field.

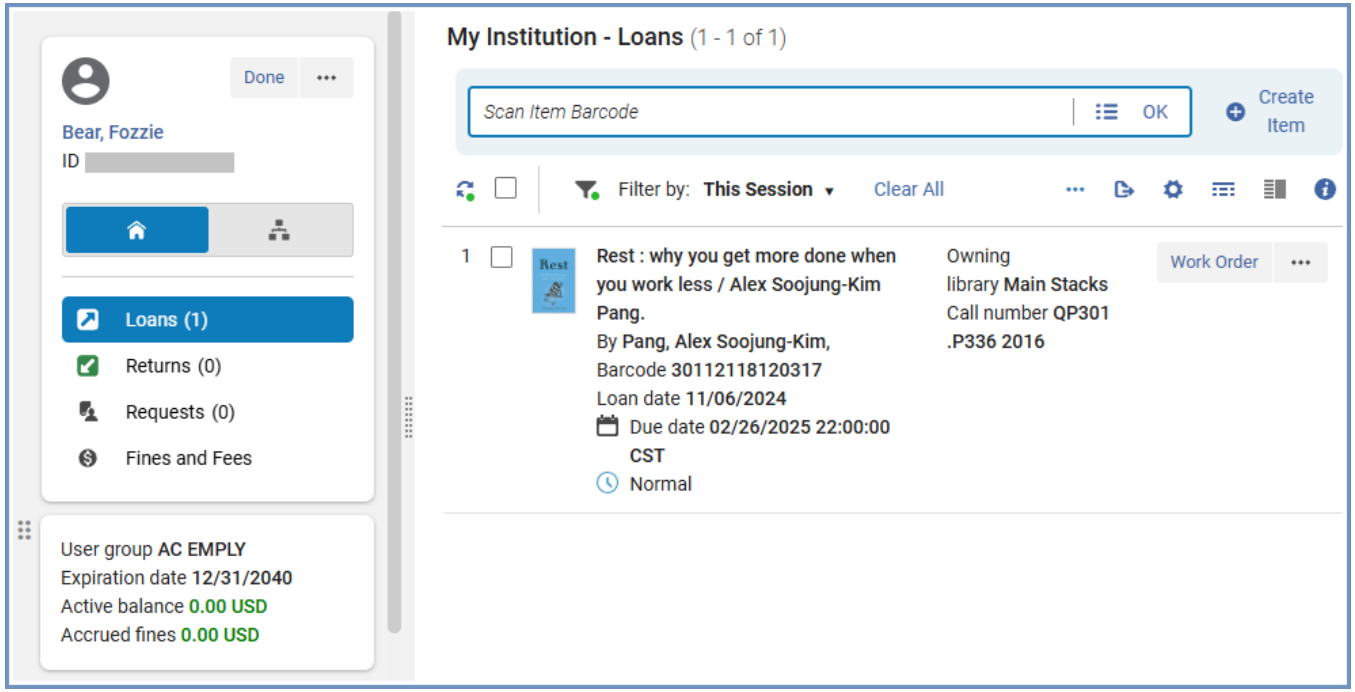


3. The patron record will open to the **Loans** tab by default.

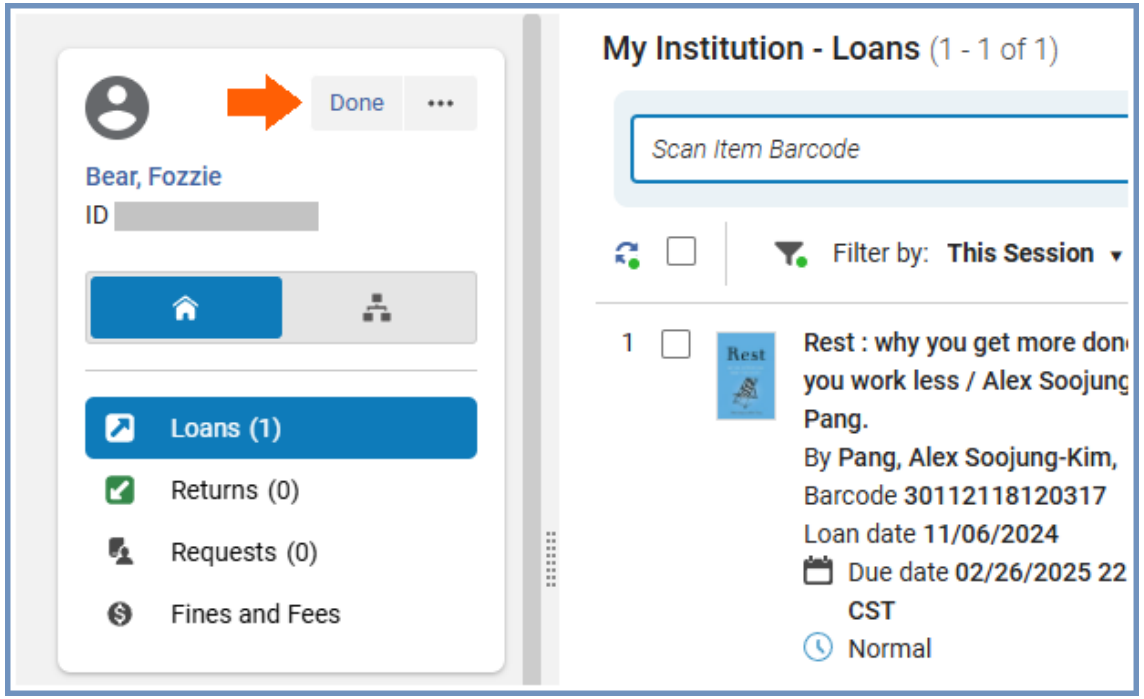


4. Scan the item barcodes into the **Scan item barcode** field.

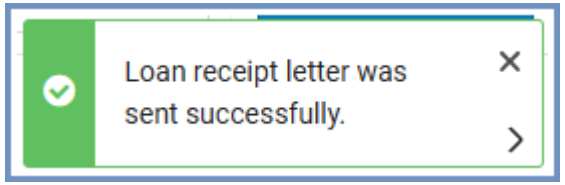
5. The checked-out items will display in a list below the **Scan item barcode** field.



6. Click the **Done** button when you are finished. (It's above the patron's name, close to the upper right corner of the patron information section.)



7. After you click “Done”, the patron will receive a notification email that the items are checked out to them. Alma will show a pop-up notification to confirm that it was sent.



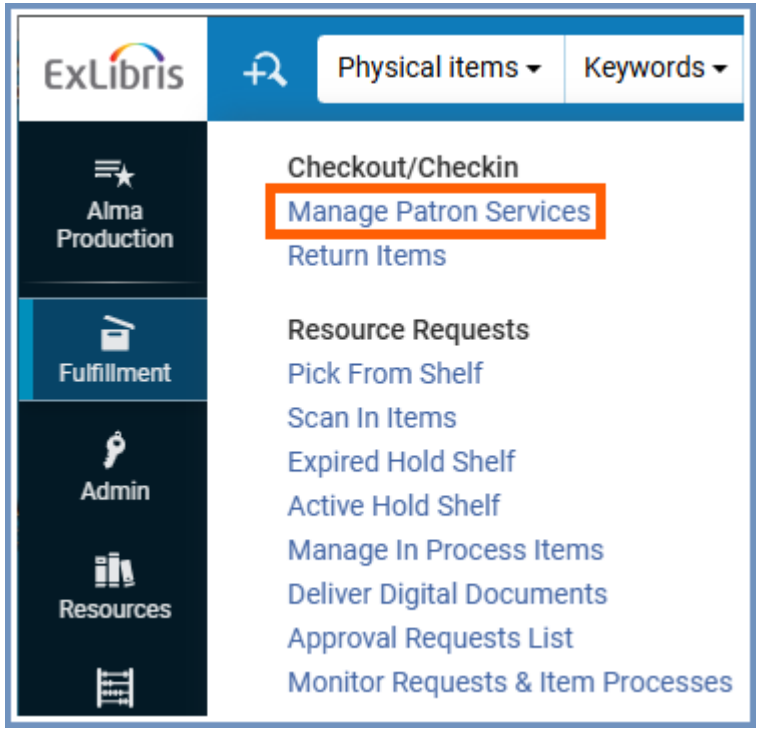
Loan Items to a Proxy Patron

A library borrower may authorize another library borrower to perform certain circulation functions on their behalf (typically checking out and renewing items). The authorizing patron is called the sponsor, and the borrower who is acting on their behalf is their proxy. To learn more about proxy authorization, visit our Proxy Authorization webpage.

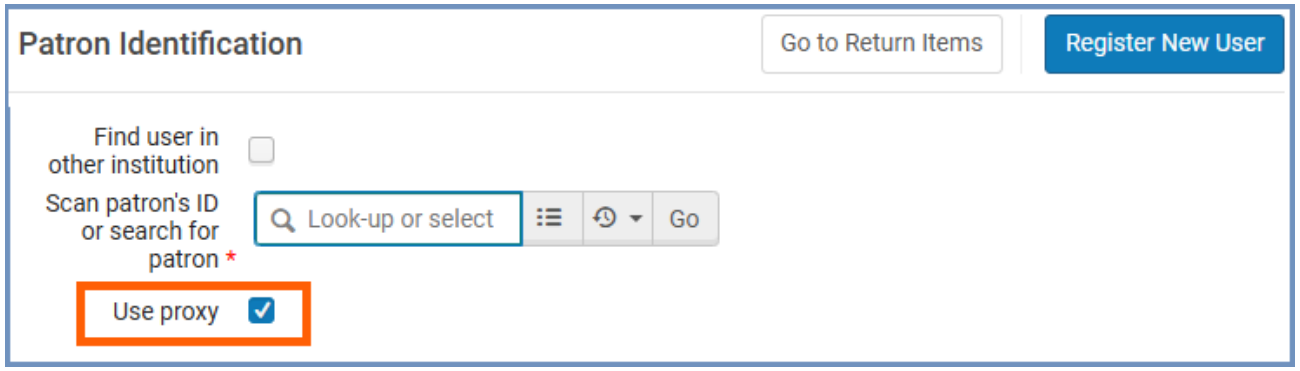
Note: The proxy patron who is there must present **their own** i-card, courtesy card, or Illinois app for you to scan. Some patrons may try to present the sponsor's card, but we can't use that, since it's not their own card.

In this example, Fitzwilliam Darcy (the proxy borrower) has come to the library to pick up books on behalf of Dana Scully (the sponsor).

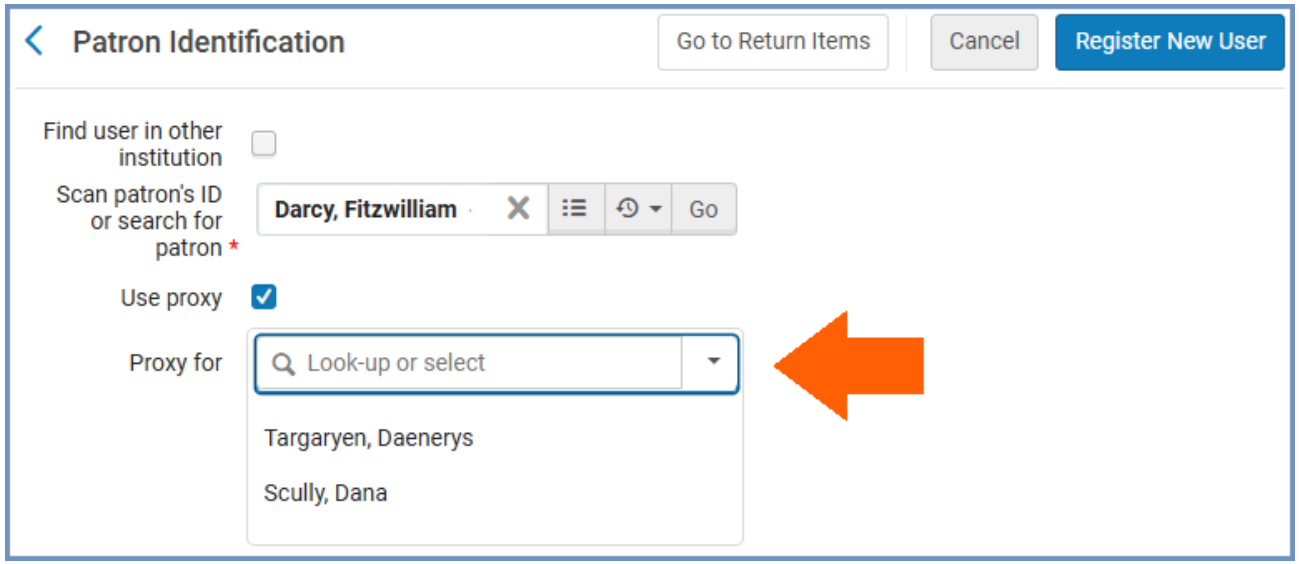
1. Go to **Fulfillment** and select **Manage Patron Services**.



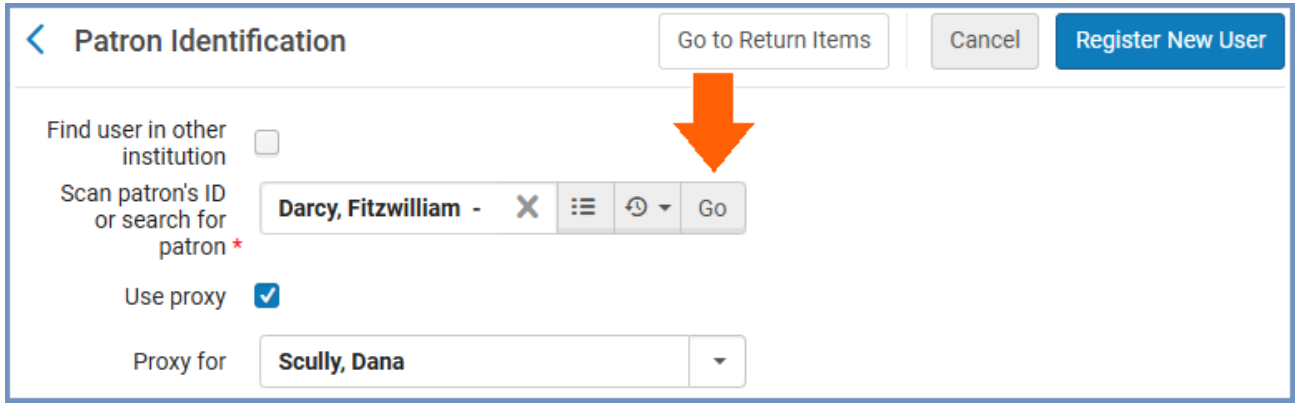
2. Check the **Use proxy** checkbox.



3. Click in the **Scan patron's ID or search for patron** field to put the cursor back in that field and then scan the proxy's card. This will bring up a drop-down menu labeled **Proxy for**. You can click the down arrow on the menu to see all of the patrons who this patron is a proxy for.

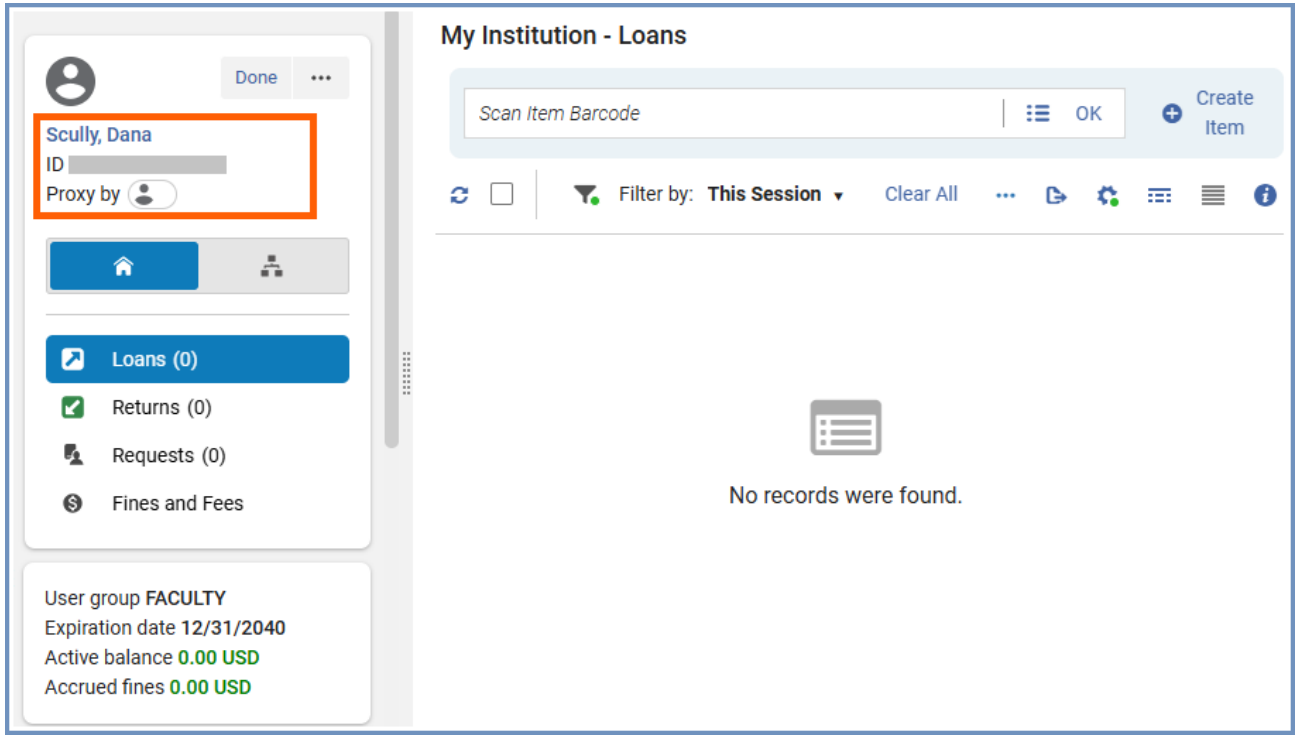


4. Once you have selected the correct sponsor, click the **Go** button.



5. There should be a pop-up note indicating the proxy relationship. Click **OK**.

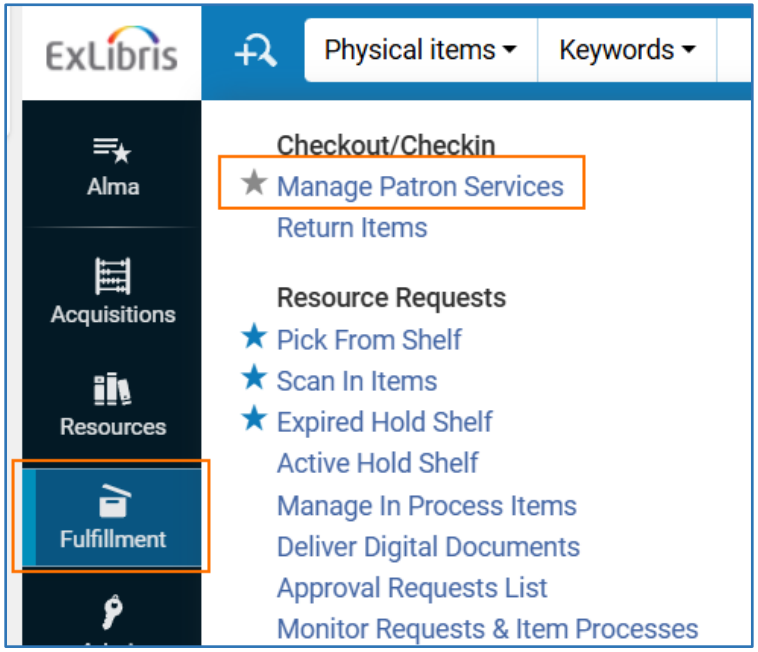
6. This will bring you to the **Loans** tab on the sponsor's page. Note that it says **Proxy by** below the sponsor's name and ID. If you click on the icon of a person to the right of those words, it will show the proxy's email address.



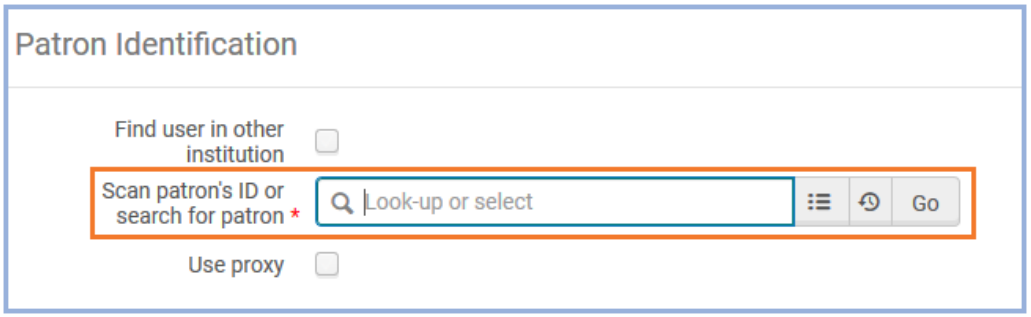
7. Scan the item barcodes into the **Scan item barcode** field to check them out on the sponsor's account.
8. Click the **Done** button when you are finished. The sponsor will then receive a notification email that the items have been checked out to their account by their proxy.

Renewing items

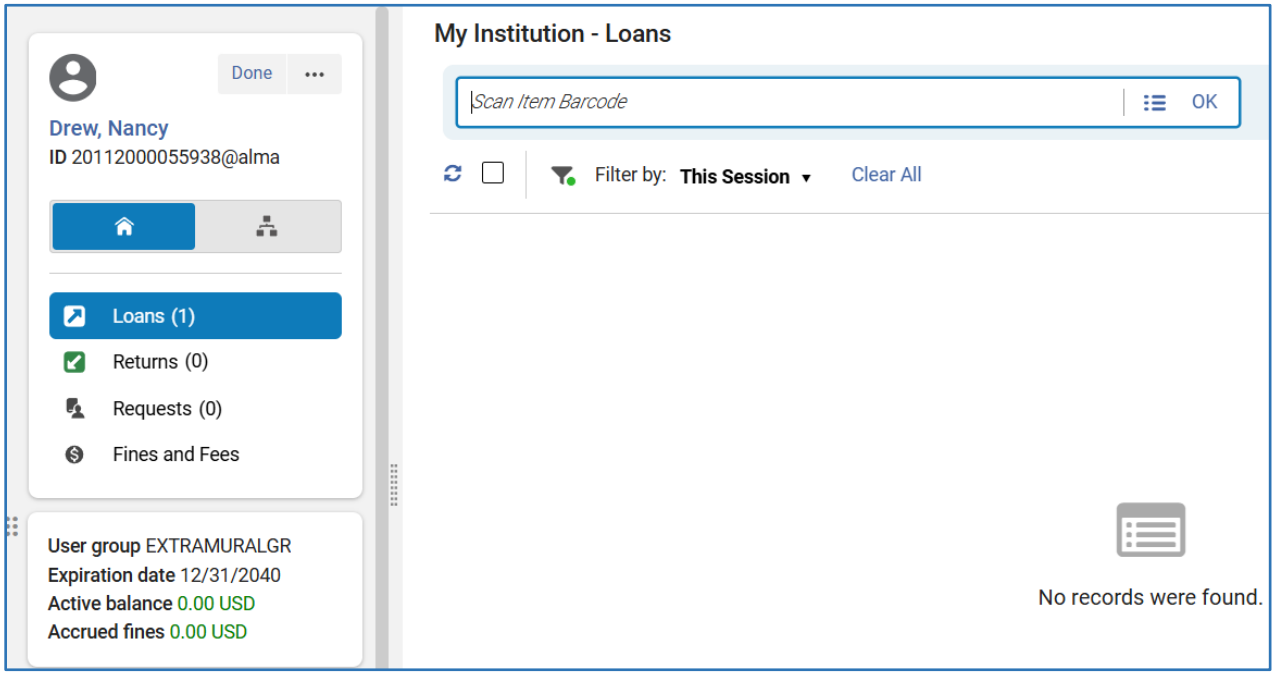
1. Go to the **Fulfillment** menu and select **Manage Patron Services**.



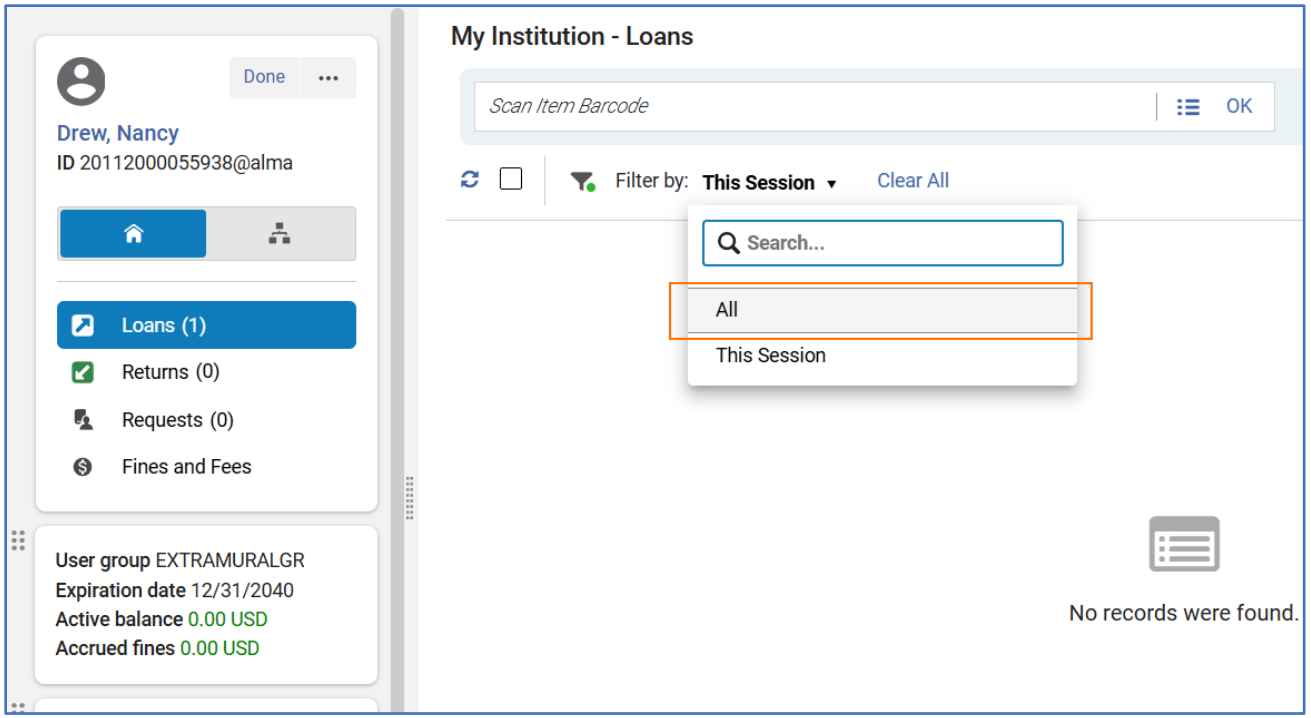
2. Scan the patron's i-card or courtesy card in the **Scan patron's ID or search for patron** field.



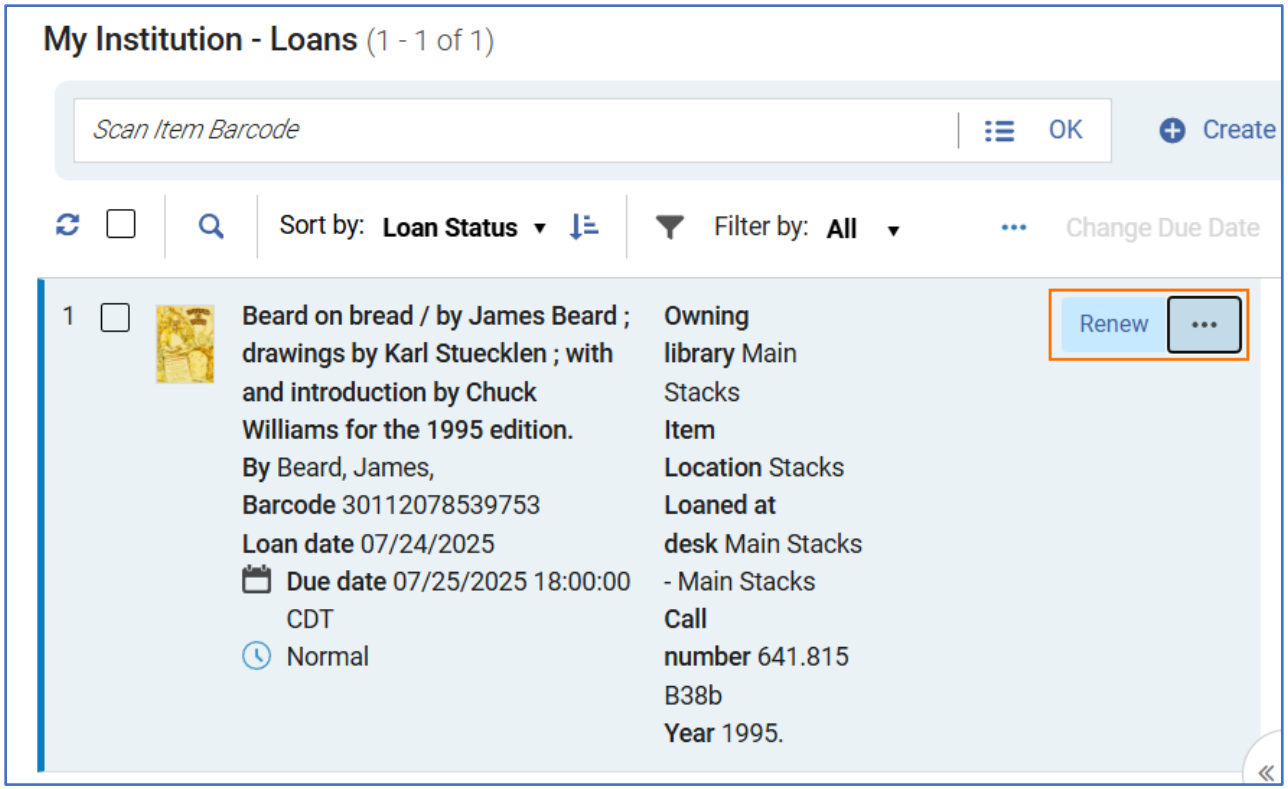
3. Patron records open to the **Loans** tab by default.



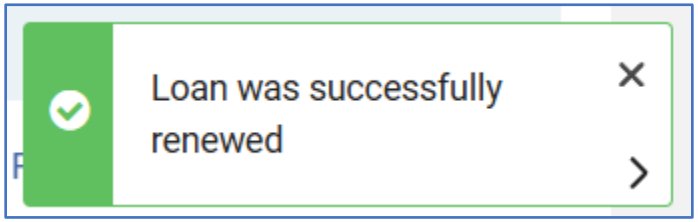
4. Make sure that the **Loan Display** is set to **All Loans**



5. Use the **Row Action (…)** button next to the desired item and choose the **Renew** option. Alternatively, the checkboxes next to each item can be checked and the **Renew Selected** option can be used. Lastly, you can use **Renew all** to renew all items on the current page.

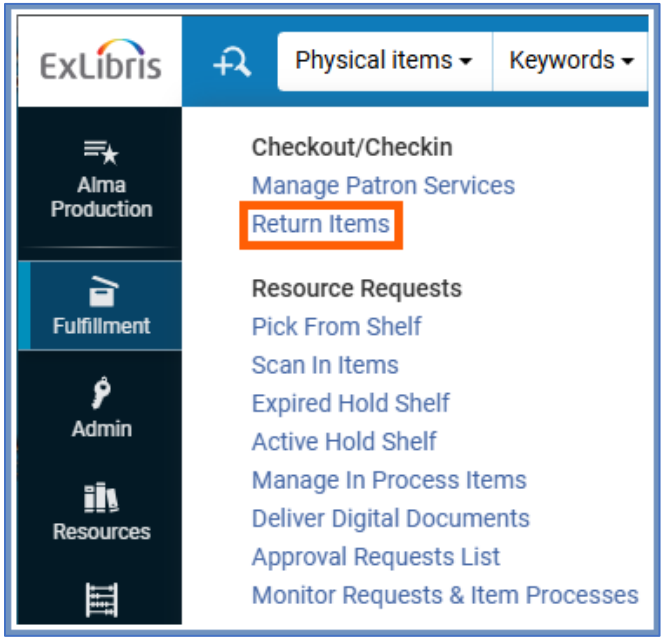


6. Alma will let you know if the item was successfully renewed. If you receive a message that the item has not been renewed, there are several possible reasons for this. For example, the patron may have reached their renewal limit for that item, or their account may have expired. Please contact Central Access Services if you need help interpreting why an item couldn't be renewed.

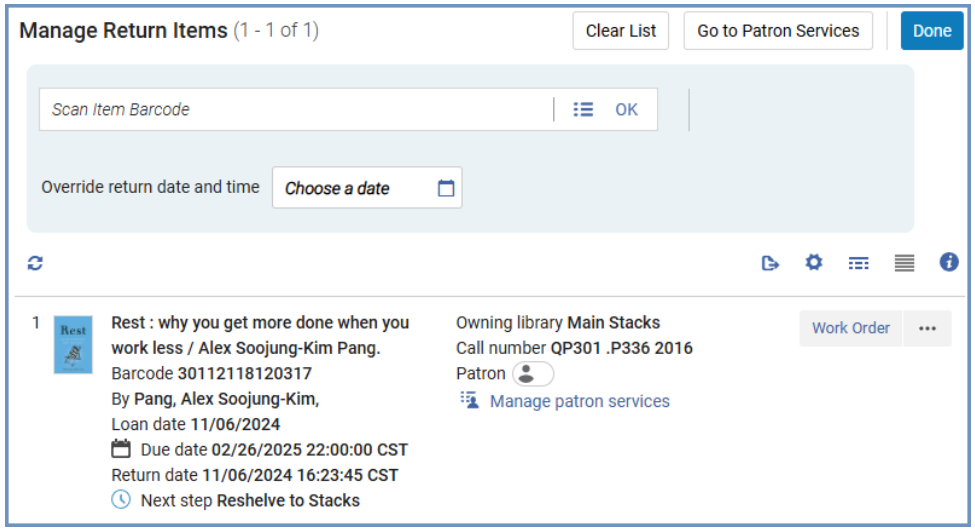


Returning items

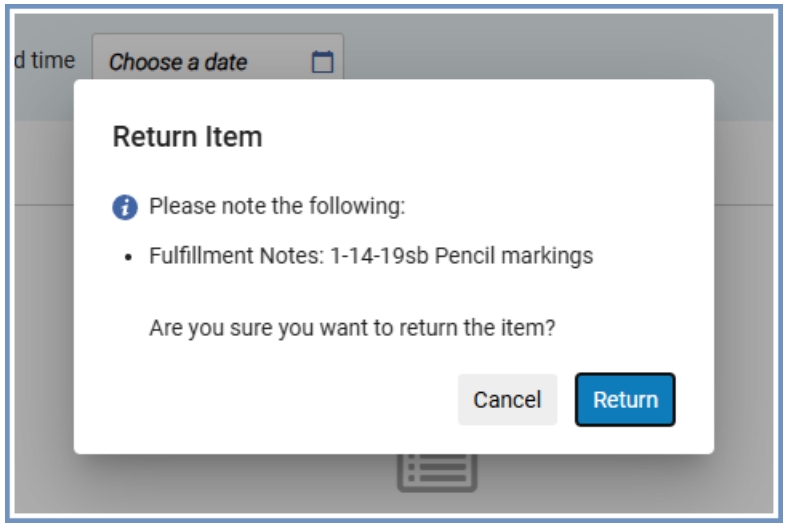
1. Open the **Fulfillment** menu and select **Return Items**.



2. Scan each returned item in the **Scan item barcode** field.



3. A condition note may pop up to indicate damage to the item that was noted before it was checked out. If it does, click **Return** to continue.



4. For each returned item, Alma will automatically credit the return to the correct corresponding patron record and email the patron a return receipt.

Return Receipt Letter

Hello Fozzie Bear,

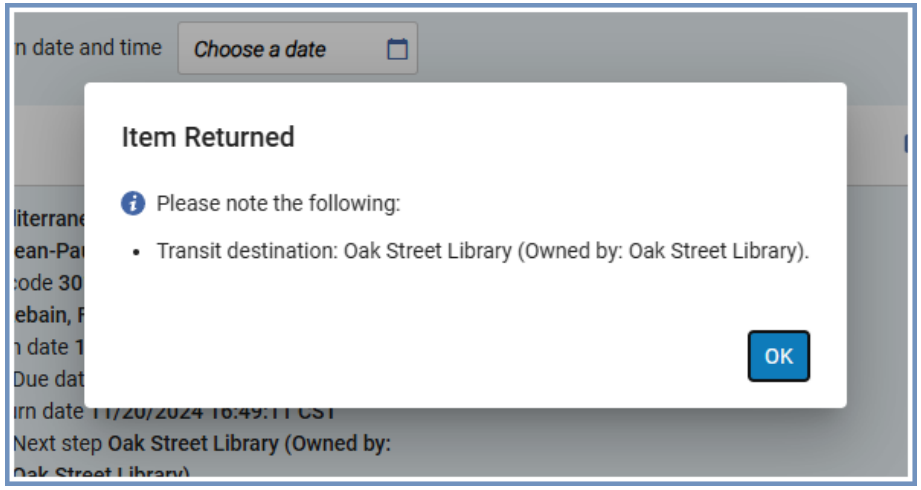
The following item(s) have been returned to the library and removed from your account:

Main Stacks

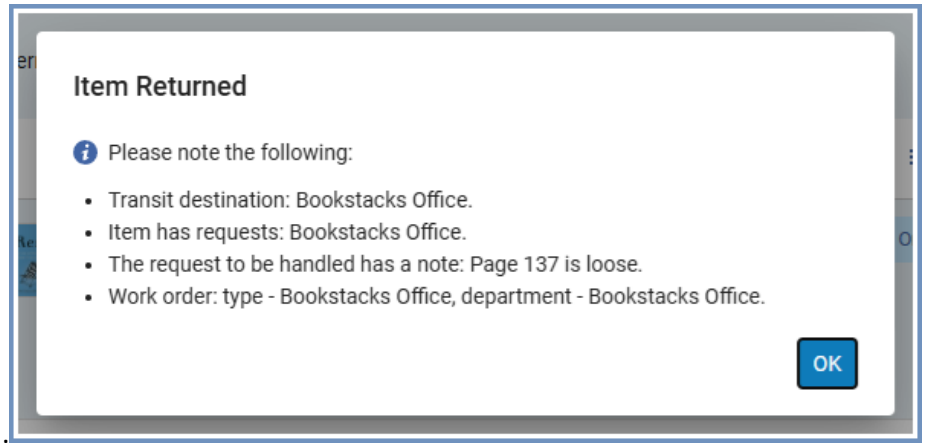
Title	Call Number	Enumeration	Barcode	Due date	Return date	Library
Rest : why you get more done when you work less / Alex Soojung-Kim Pang.	QP301 .P336 2016		30112118120317	02/26/2025 22:00:00 CST	11/06/2024 16:23:45 CST	Main Stacks

If you have questions or need assistance contact the Library Telephone Center at 217-333-8400, 1-866-262-1510 (toll free), or circlib@library.illinois.edu.

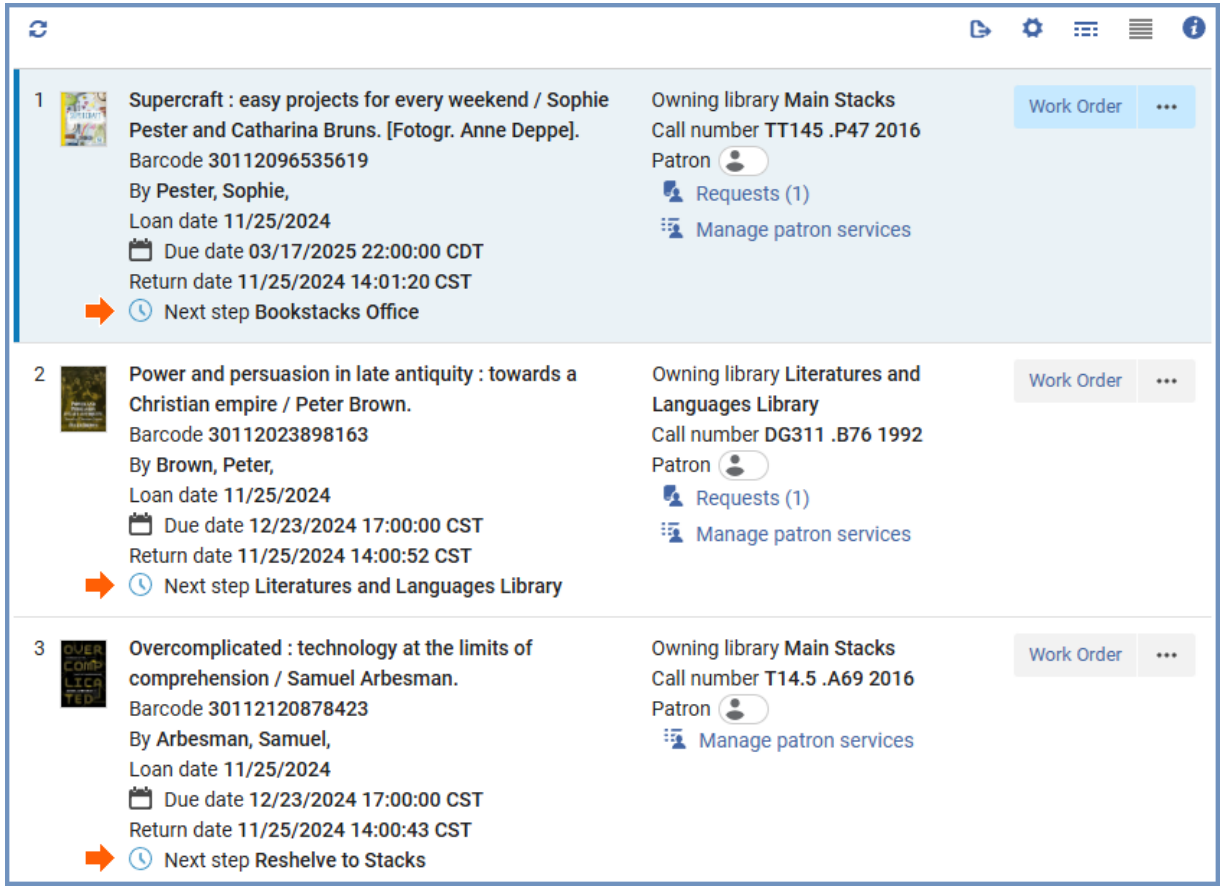
5. If the returned item belongs to another library, Alma will show a pop-up indicating this and will prompt you to print a transit slip to put in the item.



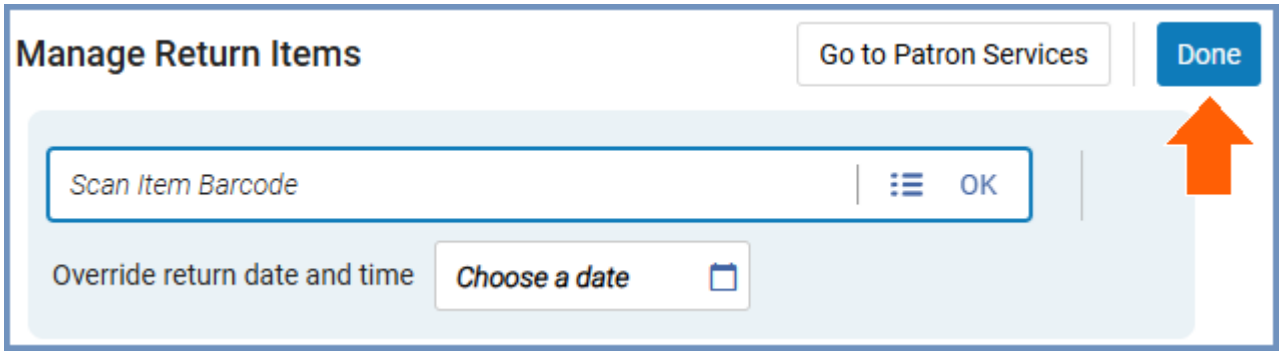
6. If the returned item fulfills a hold or has a Work Order on it, Alma will show a pop-up indicating this and will prompt you to print a slip to put in the item.



7. The list of returns includes details about the next step for each item.



8. To return to the main Alma dashboard when you're finished checking in items, click the **Done** button in the upper right corner.



Placing Requests

Patrons may request assistance requesting items from our campus or from an I-Share location. We can help with this using different search parameters in Alma depending on the situation.

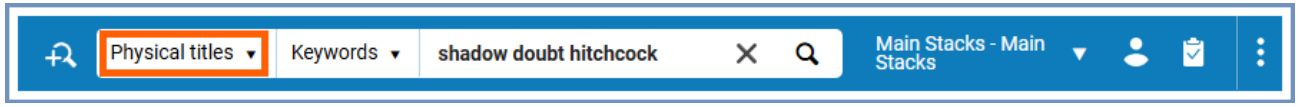
Requesting Local Items on a Patron's Behalf

Requests in Alma can be Title-level or Item-level requests.

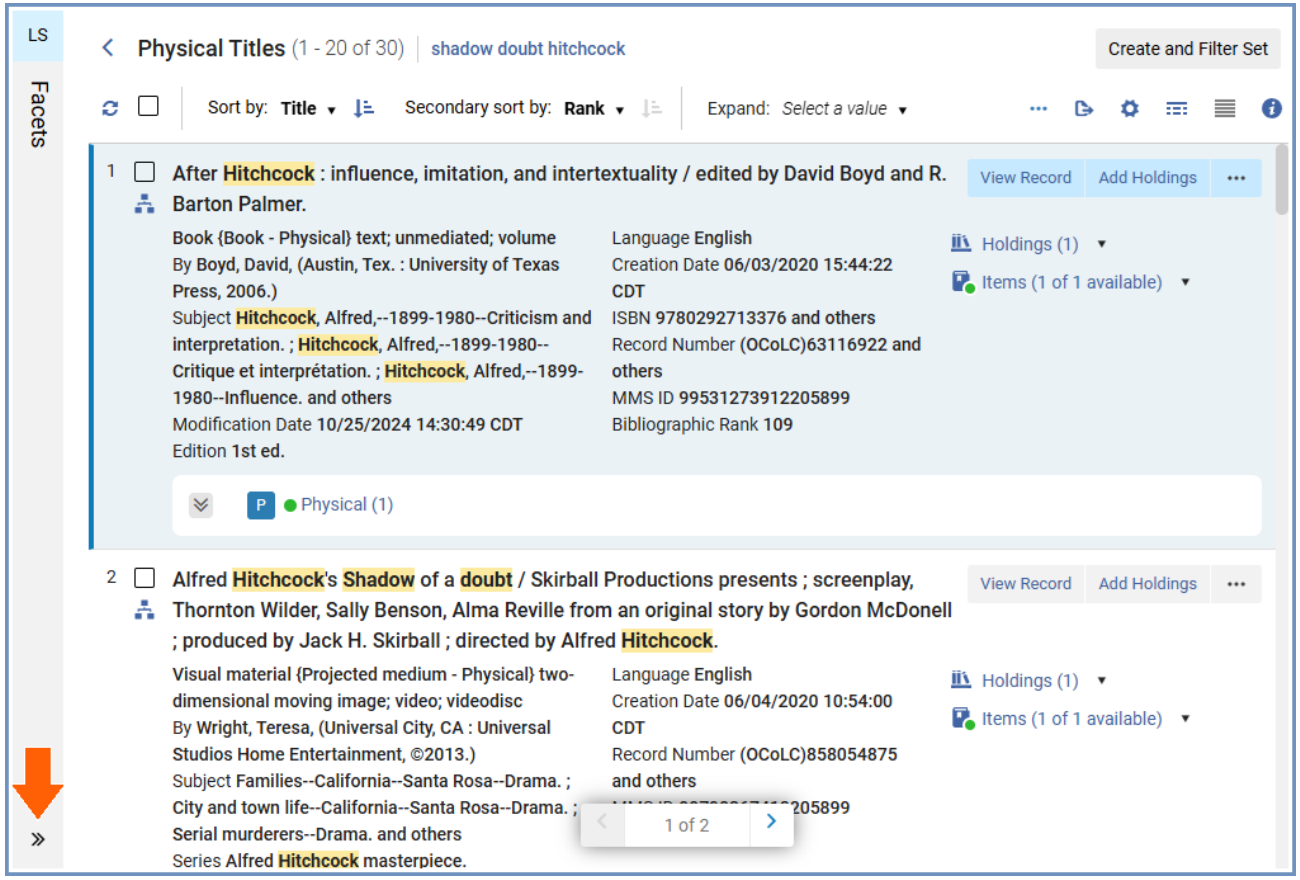
If any copy could fill the request, then it can be a **Title-level request**. To place a Title-level request, use the search parameter **Physical titles** when searching for the item.

If one specific copy would be best, then the request should be an **Item-level request**. To place an Item-level request, use the search parameter **Physical items** when searching for the item.

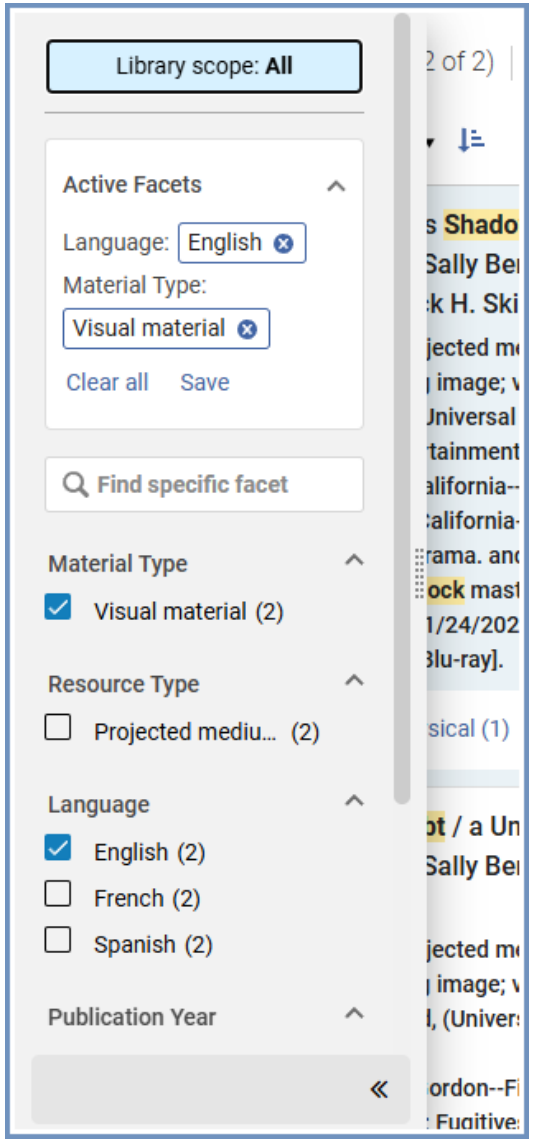
1. Use the persistent search box at the top of the screen to find what the patron is looking for. For your search parameter, use either **Physical titles** if any copy of an item could fill the request, or **Physical items** if one specific copy would be best.



2. If desired, expand the Facets sidebar on the left side and use the facets to narrow down your search.

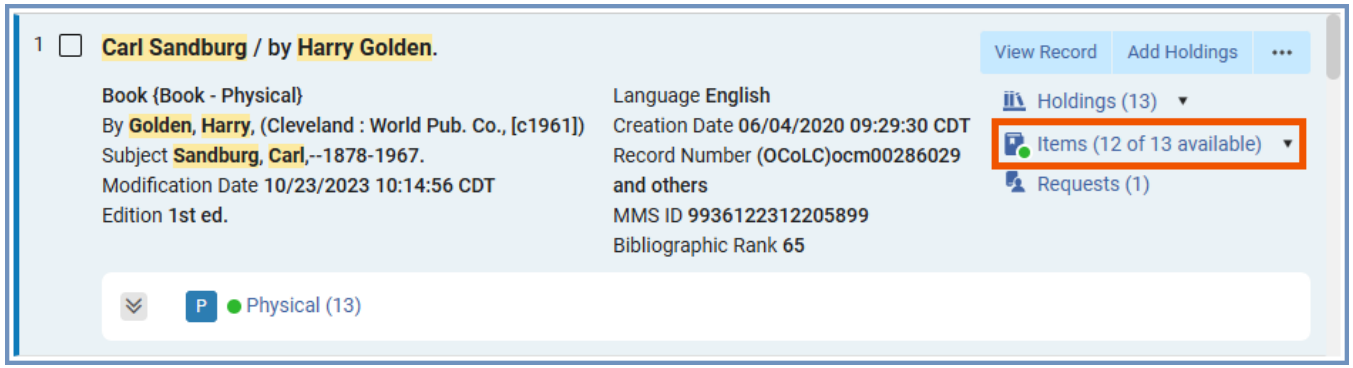


3. Any facets you select will appear in the **Active Facets** section at the top of the Facets sidebar. To remove a facet, click the **X** to the right of that facet.



4. When you find the correct entry, check to make sure there is a requestable copy available, since it is possible to place a request in Alma even if there are no copies for that title that are both requestable *and* currently available.

a. Click the **Items** link on the right side of the entry.



b. Check the Status and Location columns for the items to see if they're available to be requested.
   i. If the Status says **Item not in place** (which is usually because it's requested, on hold, checked out, or in transit), that item is not requestable.
   ii. If the Location says "Withdrawn", or if it includes "Non-circulating", that item is not requestable.
   iii. If the Location says "BTAA Shared Print Repository", that item is not requestable. However, the patron can contact Oak Street Library to ask about viewing the item.
   iv. If the Location includes "Reserves" or "Pop-Up Collection", that item is not requestable. However, if the Status is "Item in place", the patron can go to the location where the item is and check it out from there.

Carl Sandburg / by Harry Golden. Golden, Harry, 1902-1981 World Pub. Co., Cleveland : [c1961]

MMS ID 9936122312205899 View all holdings

1 - 13 of 13 Barcode Sort routine 0 rows selected Manage Selected

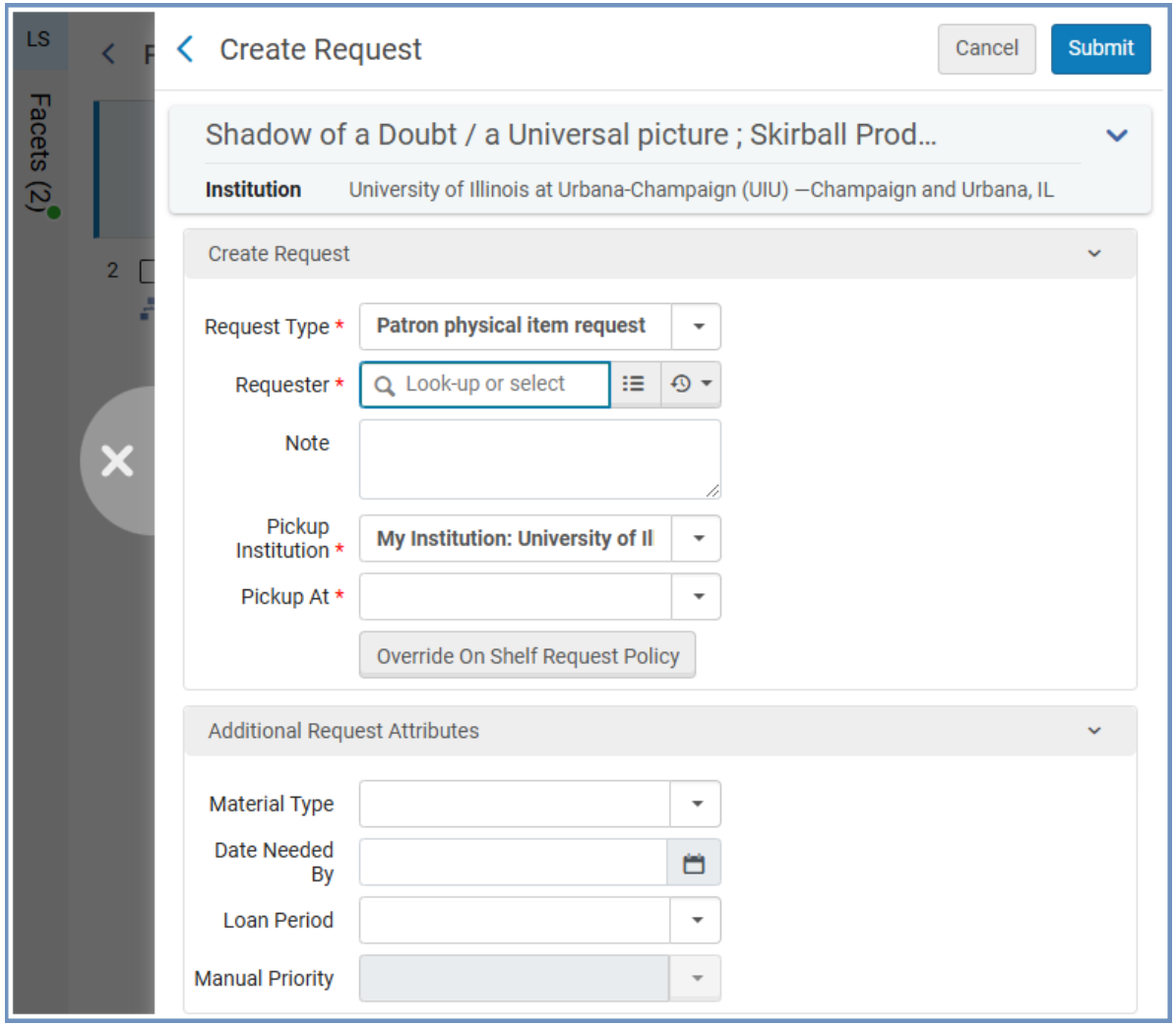
Status : All Library : All Location : All Year : All Volume : All Description : Receive Date : All

	Barcode	Library	Location	Call Number	Item Call Number	Year	Description	Volume	Temporary Location	Status	Process type	Item Policy
1	388881...	Technical Services	Withdrawn	B. S213g	-	-	-	-	No	Item in place	-	-
2	301120...	Illinois History and Lincoln Collections	Stacks Non-circulating	B. S213g	-	-	-	-	No	Item in place	-	-
3	301121...	Rare Book and Manuscript Library	Stacks Non-Circulating	SNDBRG B. S213g	-	-	-	-	No	Item in place	-	-
4	301121...	Rare Book and Manuscript Library	Stacks Non-Circulating	SNDBRG B. S213g	-	-	-	-	No	Item in place	-	-
5	301120...	Oak Street Library	Vaults	B. S213g	-	-	-	-	No	Item not in place	Requested	-
6	301120...	Technical Services	Withdrawn	PS3537.... Z58 1961	-	-	-	-	No	Item in place	-	-
7	301120...	Technical Services	Withdrawn	PS3537.... Z58 1961	-	-	-	-	No	Item in place	-	-
8	301121...	Rare Book and Manuscript Library	Stacks Non-Circulating	SNDBRG B. S213g	-	-	-	-	No	Item in place	-	-
9	301121...	Rare Book and Manuscript Library	Stacks Non-Circulating	SNDBRG B. S213g	-	-	-	-	No	Item in place	-	-
10	309961...	Technical Services	Withdrawn	811 Sa49Yg	-	-	-	-	No	Item in place	-	-
11	301121...	Technical Services	Withdrawn	811 Sa49Yg	-	-	-	-	No	Item in place	-	-
12	301120...	Rare Book and Manuscript Library	Stacks Non-Circulating	Sandburg 586	-	-	-	-	No	Item in place	-	-
13	301121...	Rare Book and Manuscript Library	Stacks Non-Circulating	SNDBRG B. S213g	-	-	-	-	No	Item in place	-	-

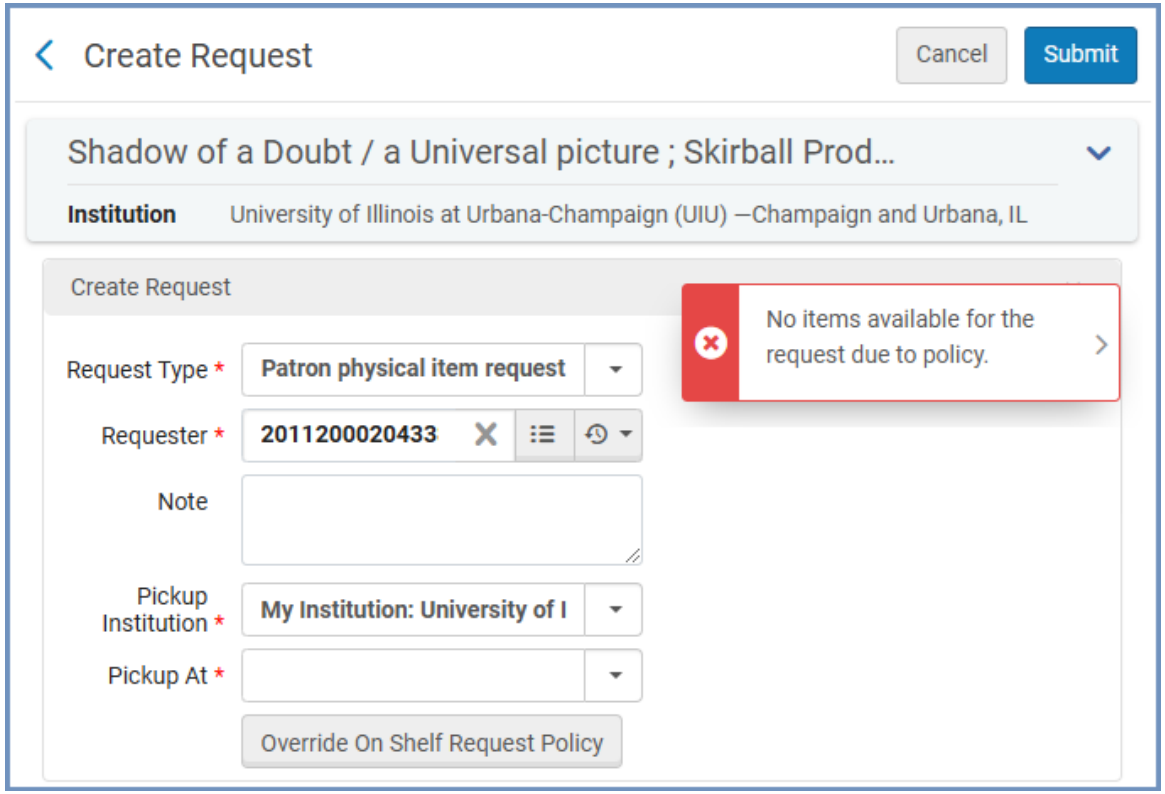
c. If no local copies are currently available for requesting, check if it's possible to request an I-Share copy instead.

5. If there is at least one available and requestable local copy, return to the results screen for your Physical Titles search. Once there, click **Request** in the upper right corner of the entry. If there isn't a **Request** button visible, click the **More actions** button (with three dots) in the upper right corner of the entry and select **Request** from the drop-down menu.

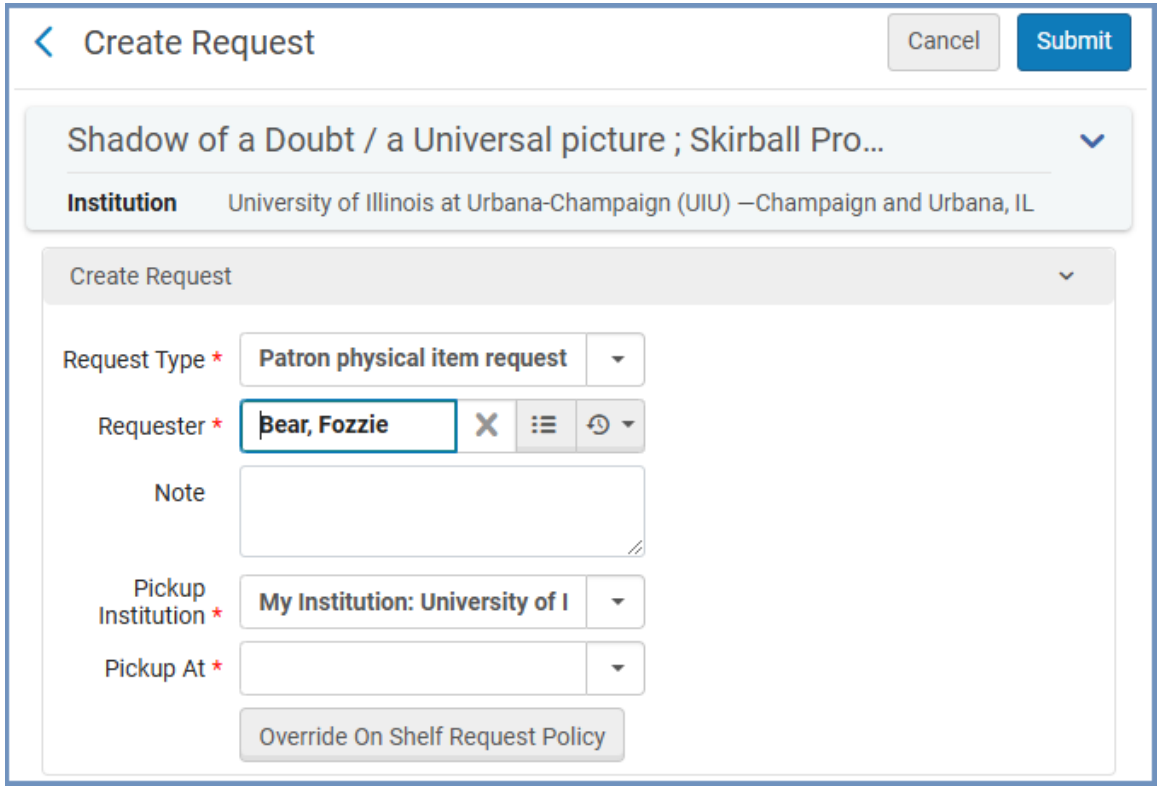
6. The **Create Request** screen will appear. The **Request Type** option should be **Patron physical item request**.



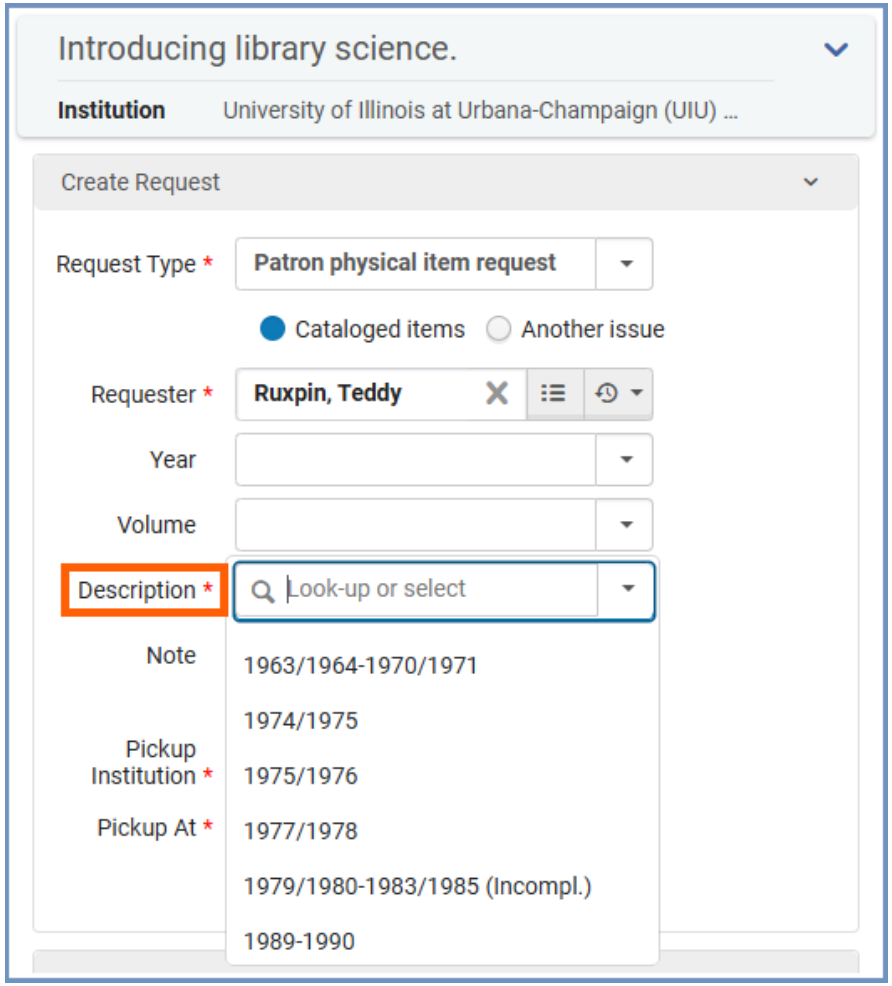
7. Scan the patron's ID in the **Requester** field.



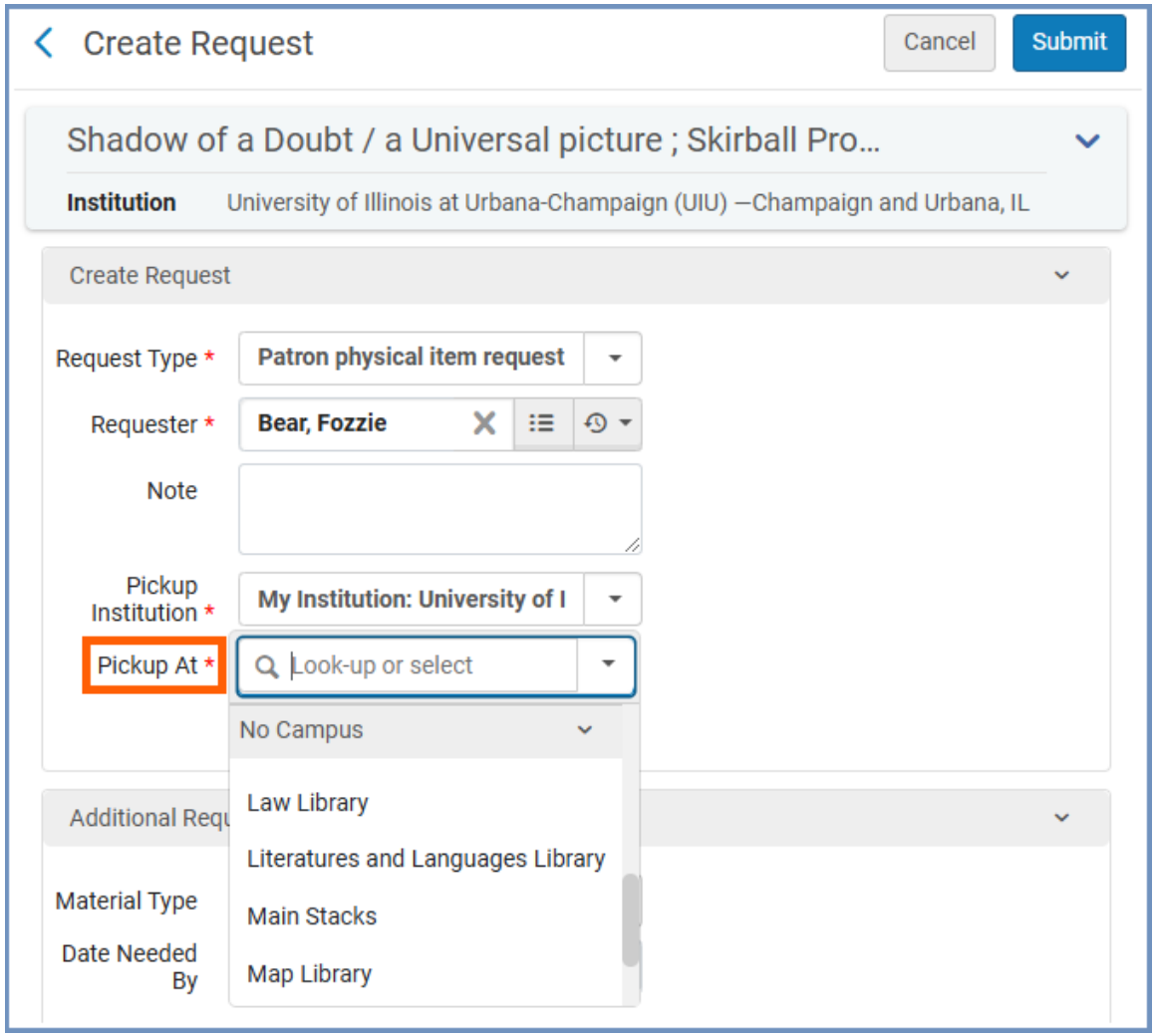
8. If the patron's name does not appear in the **Requester** field, click that field to put your cursor back in it. Then press the **Enter** key. Once the patron's name appears in the **Requester** field, you can continue.



9. If the requested item is part of a series, select an option in the **Description** field to indicate which item in the series is being requested.

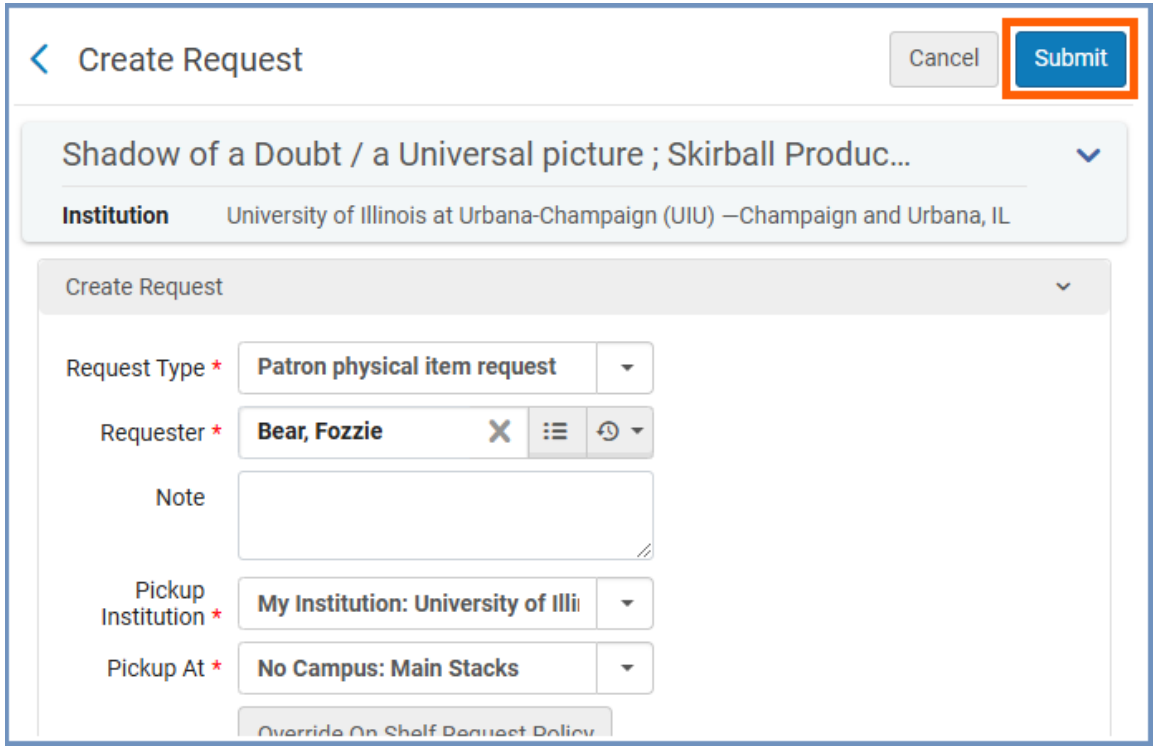

Introducing library science.
Institution
University of Illinois at Urbana-Champaign (UIU) ...
Create Request
Request Type *
Patron physical item request
Cataloged items
Another issue
Requester *
Ruxpin, Teddy
Year
Volume
Description *
Look-up or select
Note
Pickup Institution *
Pickup At *
1963/1964-1970/1971
1974/1975
1975/1976
1977/1978
1979/1980-1983/1985 (Incompl.)
1989-1990

10. Ask the patron where they would like to pick up the item, then select that option from the **Pickup At** drop-down menu. Some items can only be picked up at certain locations, so the drop-down menu for the **Pickup at** field may only show those locations.



11. You can also select options in the **Additional Request Attributes section** but be aware that adding these limits may mean that Alma would be unable to fill the request. This section should be left as is for most requests.

12. Click the **Submit** button near the upper right corner to finish the request.

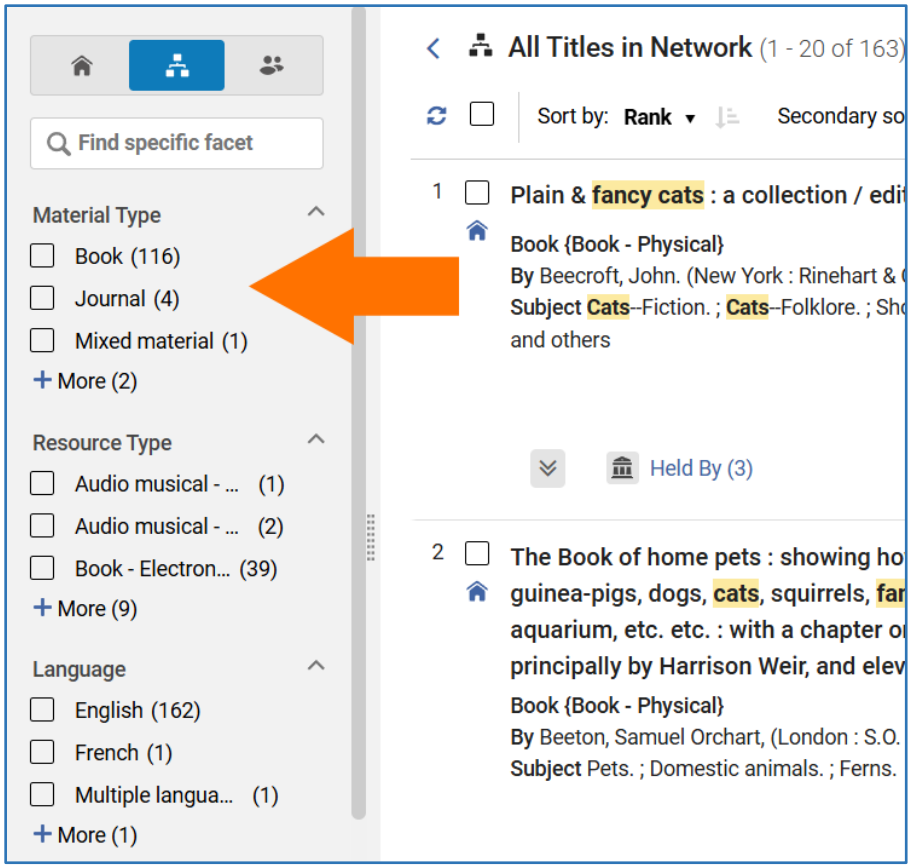


13. The system should provide confirmation that the request has been placed.

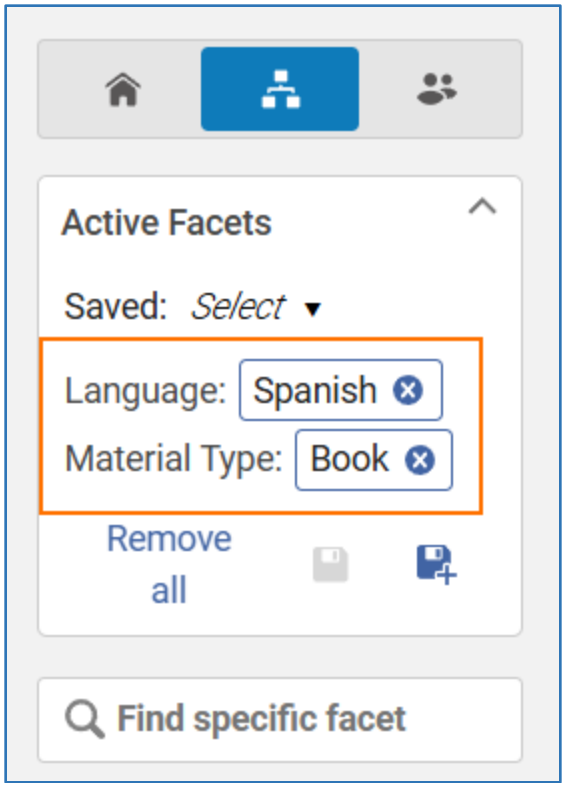
Requesting I-Share Items on a Patron's Behalf

1. You can use the persistent search bar at the top of the page to find the item that the patron needs. Before searching, make sure you have selected **Network** from the icon drop down menu left of the search button.

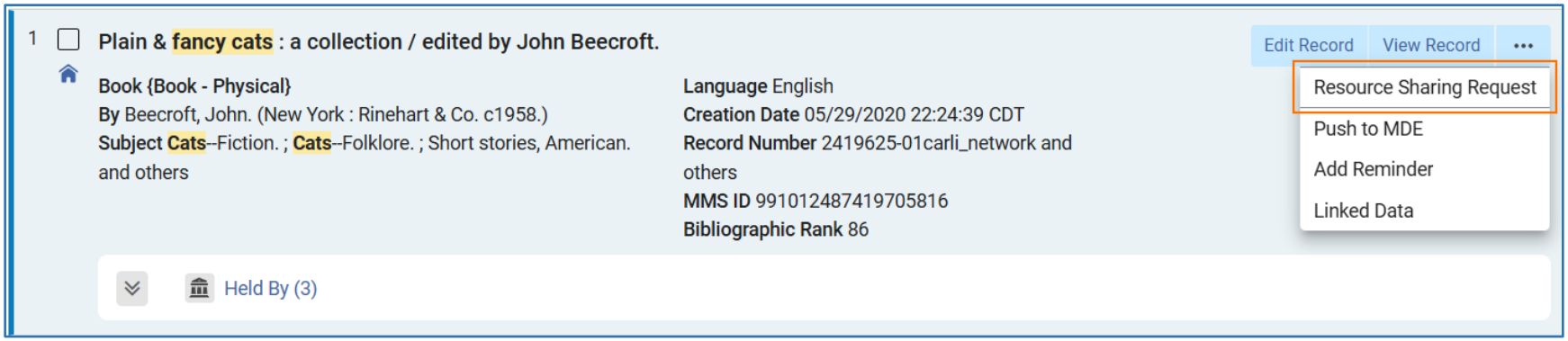
2. You can use the facets in the left sidebar to narrow down your search.



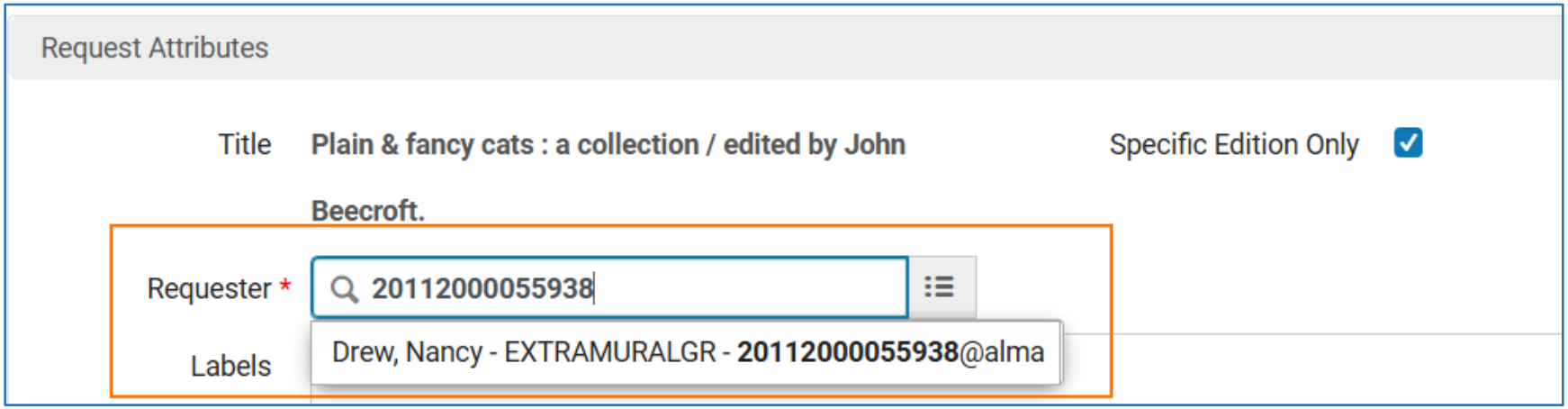
3. The facets you select will appear at the top of the list of items. If you want to remove a facet, click the **X** in the circle to the right of that facet.



4. After you find the correct item record, click the **Resource Sharing Request** button in the upper right corner.

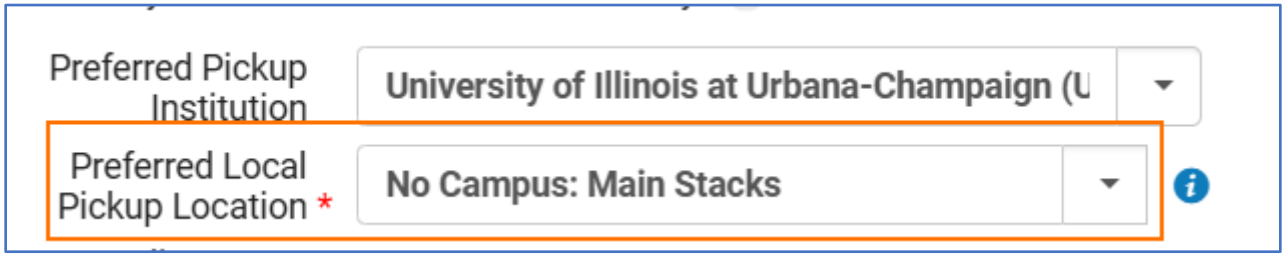


5. Next, click the **Requester** field to put your cursor in it. Scan the patron's ID in the **Requester** field.

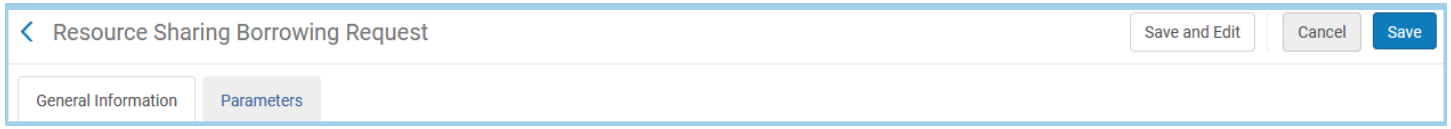


6. Then hit the **Enter** key. Once the patron's name appears in the **Requester** field, you can continue.

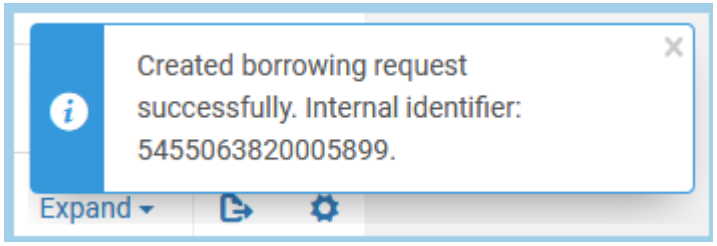
7. Ask the patron where they would like to pick up the item and select that option from the **Preferred Local Pickup** Location drop-down menu. If the patron wants it sent it to a different institution, select it from the **Preferred Pickup Institution** menu and then select the location from the **Preferred Pickup Location** drop down menu.



8. Click the **Save** button near the upper right corner to finish the request.



9. The system should provide you confirmation that the request has been placed. Patrons can monitor their requests in Primo.



Library Terms in Frequent Use at the University Library

A well-known part of working in a library is getting used to the many acronyms and other jargon in use. You can find a few different resources here for getting used to the different terms that you might see.

Alma

Alma is the staff-facing platform that we use to manage library resources and patron accounts.

CARLI

The Consortium of Academic and Research Libraries in Illinois. The consortium comprises over 145 academic and research libraries in the state, and it came into existence on July 1, 2005. All I-Share institutions are a part of CARLI, but not all CARLI institutions are a part of I-Share. A list of the CARLI libraries is available here:

CARLI Participating Libraries

Hold

If an item is on hold, it has been reserved for a patron to pick-up until a certain date (either by the patron or by Library staff). Most items will be held in the Library chosen for pick up for two weeks.

I-Share

The I-Share integrated library system serves as the online public catalog for all I-Share member libraries. I-Share provides participating libraries with an online catalog of their own collection as well as a merged, union catalog of the holdings of all I-Share libraries and supports resource sharing among participating libraries. A list and map of I-Share libraries are available here:

I-Share Members List

I-Share Members Map

InterLibrary Loan (ILL)

If an item is not available here on campus or through I-Share, patrons can request them through InterLibrary Loan. ILL locates items all over the world to fill our patrons' requests. You can read more about InterLibrary Loan services here:

InterLibrary Loan & Document Delivery

Loan

Loaning an item in Alma checks it out to a patron's account.

OPAC

Stands for Online Public Access Catalog. This is a term for the catalog that patrons use to discover resources that a library offers. Primo VE is the platform for the University Library's OPAC as well as I-Share's OPAC.

Pick Slip/Pick List

Pick Slips are generated in Alma when an item is requested. It contains information about the request that can be used to locate the item on the shelf. A Pick List gives this information, as well, but in the form of a spreadsheet.

Primo

Primo is the patron-facing part of our library management system.

Return

Returning an item takes it off of a patron's account. Completing this process will either indicate that the item can be reshelved at your Library or transited to its lending library for reshelving.

UIU

This is our three-digit I-Share code for the University of Illinois at Urbana-Champaign Library. It is used to refer to all unit libraries at the University of Illinois. You can find a map with all unit libraries marked here:

Libraries & Hours

Work Order

A Work Order is the Alma term for an internal library request often used to route physical materials for internal processing. Libraries may use Work Orders for many different purposes.

Helpful Links

These links give you helpful resources for further training, Fulfillment questions, and other library services.

Resource	Link
Alma	https://go.library.illinois.edu/alma
Primo	https://i-share-uiu.primo.exlibrisgroup.com/discovery/search?vid=01CARLI_UIU:CARLI_UIU&lang=en
University Library Alma Training Resources	https://www.library.illinois.edu/staff/alma/
CARLI Alma Training Resources	https://www.carli.illinois.edu/products-services/i-share/alma/fulfillment/how-to_fulfillment
Ex Libris Alma Fulfillment Essentials	https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English
Borrowing Services Overview	https://www.library.illinois.edu/borrowing/
Circulation Help	https://www.library.illinois.edu/staff/cas/
Confidentiality Policy	http://www.library.illinois.edu/circ/policies/Confidential.html
Courtesy Cards	http://www.library.illinois.edu/circ/services/courtesycards.html
Proxy Authorization Information	https://www.library.illinois.edu/borrowing/proxy/
Standard Loan Periods Chart	https://www.library.illinois.edu/staff/cas/standard-loan-periods/
Main Stacks Information	http://www.library.illinois.edu/circ/policies/Stacks.html

If you need Fulfillment help, contact Central Access Services!

Monday-Friday 8:30am-5pm: 217-333-8400

Weekend and Evenings: 217-244-0732

circlib@library.illinois.edu