

Basic Fulfillment Exercises

Objective: At the end of these exercises, the learner will be able to do common circulation tasks.

Instructional Video: In addition to the written documentation linked on each exercise, an instructional video about Basic Fulfillment from May 2020 can be viewed here:

https://mediaspace.illinois.edu/media/t/1_w91lce23

(You will need to log in using your NetID and password to view the video.)

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Logging into Alma

Objective: At the end of this exercise, the learner will be able to log into Alma.

Exercise: Using the Alma documentation “Log into Alma” located here:

<https://www.library.illinois.edu/staff/wp-content/uploads/sites/24/2020/04/Log-In-1.pdf>

complete the following steps:

1. Go to <https://go.library.illinois.edu/alma>
2. Enter your NetID and password and click “Login”.
3. You will also need to authenticate using 2FA.
4. Check that your physical location is correct.
5. Enable quick printing.

Loaning Items

Objective: At the end of this exercise, the learner will be able to loan out (charge) an item to a local patron in Alma.

Exercise: Using the Alma documentation “Loan an Item” located here:

<https://www.library.illinois.edu/staff/wp-content/uploads/sites/24/2020/04/Loan-Items.pdf>

complete the following steps:

1. Go to “Fulfillment” and select “Manage Patron Services”.
2. Enter (scan) the patron’s barcode in the “Scan patron’s ID or search for patron” field.
3. Patron record will open to the Loans tab by default.
4. Enter (scan) the item barcode 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 in the upper right corner when you are finished. The patron will receive a notification email of the items that were checked out to them..

Proxy Patron Loans

Objective: At the end of this exercise, the learner will be able to loan out (charge) an item to a proxy patron in Alma.

Exercise: Using the Alma documentation “Proxy Loan” located here:

<https://www.library.illinois.edu/staff/wp-content/uploads/sites/24/2020/04/Loan-Items-Proxy-Patron.pdf>

complete the following steps:

1. Go to Fulfillment and select “Manage Patron Services”
2. Check “Use proxy”, then enter (scan) the patron barcode. A drop down menu will appear - choose the appropriate person for whom they are proxying.
3. Proceed as above for Loaning items - remember to click the “Done” button. This will generate a letter to the person under whose name the items were loaned out.

Returning Items

Objective: At the end of this exercise, the learner will be able to return (discharge) an item.

Exercise: Using the Alma documentation “Return items” located here:

<https://www.library.illinois.edu/staff/wp-content/uploads/sites/24/2020/04/Return-Items.pdf>

complete the following steps:

1. Go to “Fulfillment” and select “Return Items”.
2. Enter (scan) the item barcode for each returned item in the “Scan item barcode” field.
3. If the returned item fulfills a hold, Alma will show a pop-up indicating this. It should also print a hold slip, or prompt you to print one.
4. When you’re finished checking in items, click the “Exit” button in the upper right corner.

Backdating Returns

Objective: At the end of this exercise, the learner will be able backdate a returned item in Alma.

Exercise: Using the Alma documentation “Changing the Return Date” located here:

<https://www.library.illinois.edu/staff/wp-content/uploads/sites/24/2020/04/Return-Items-Change-Return-Date.pdf>

complete the following steps:

1. Go to Fulfillment and select “Return Items”.
2. Override return date and time (choose date and time) and then click “Apply”.
3. Enter (scan) the item barcode item and then click “OK”.
4. Pick a second item and scan the barcode. Then change the item's return date:
 - a. Click the ellipses (...) on the far right of the item in the list.
 - b. Pick “Select return date” from the drop-down menu.
 - c. Choose a date from the calendar and click “Apply”.
 - d. Click “Submit”.