

Basic Fulfillment Exercises

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

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Logging into Alma

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

Exercise: Complete the following steps 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>

1. Go to <https://go.library.illinois.edu/alma>.
2. Enter your NetID and password and click “Sign in”.
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: Complete the following steps 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>

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.
 - a. You can either use your own barcode or the barcode 20112000204338 for dummy patron Fozzie Bear.
 - b. If you’re using the dummy barcode, click “Go” after you paste it into the field.
3. The patron record will open to the Loans tab by default.
4. Enter (scan) the item barcode into the “Scan item barcode” field.
5. 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.
7. If this was just for practice, check the item back in (see the “[Returning Items](#)” section below).

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: Complete the following steps 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>

1. Go to Fulfillment and select “Manage Patron Services”.
2. Check the “Use proxy” checkbox, then enter (scan) the patron barcode.
 - a. For this exercise, use the barcode 20112000204486 for dummy patron Fitzwilliam Darcy.
 - b. Normally we would scan the patron's card. In this case, copy and paste the barcode into the field and then click “Go”.
3. A drop-down menu will appear - choose the appropriate person for whom they are proxying, and then click “Go”.
 - a. For this exercise, pick dummy patron Dana Scully.
4. Proceed as above for Loaning items. Remember to click the “Done” button when you're finished. This will generate a letter to the person under whose name the items were loaned out.
5. Since this is just for practice, check the item back in (see the “[Returning Items](#)” section below).

Returning Items

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

Exercise: Complete the following steps using the Alma documentation “Return items” located here: <https://www.library.illinois.edu/staff/wp-content/uploads/sites/24/2020/04/Return-Items.pdf>

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 to backdate a returned item in Alma.

Exercise: Complete the following steps 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>

1. Go to Fulfillment and select “Return Items”.
2. Override the return date and time (choose date and time) and then click “Apply”.
3. Enter (scan) the item barcode for the returned 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”.
5. When you’re finished checking in items, click the “Exit” button in the upper right corner.