

# 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](mailto: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.**

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## 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 Journals/Serials 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.
- Most I-Share items (both those lent from UIUC 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 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
  - Residence Hall Library and 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 to another for pickup.

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

## I-Share

We're a part of a consortium of 80+ universities and research institutions in Illinois. Patrons can request items from I-Share institutions for pickup at a UIUC Library.

- 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.
- Please refer any issues with a user account to Central Access Services
- 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:

1. 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.
2. If it's a weekend or evening or 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.
3. If you're unable to reach someone at either number, fill out a BLOK form (<https://www.library.illinois.edu/staff/cas/> under **Reporting Forms**).

## Library Cards

Patrons must present a valid, unexpired Library card to be able to use the Library. We are not able to accept digital cards of any kind for Library transactions (including the Illinois app), and patrons cannot provide their Library number verbally in place of their physical card.

*IDs that are valid to use at a UIUC Library:*

- i-cards
- Courtesy Cards
- IDs from the patron's I-Share institution (e.g., an ISU ID card)

*IDs that are not valid to use at a UIUC Library:*

- Public library cards
- Driver's Licenses
- Digital identification cards (e.g., the Illinois app)
- ID numbers given by patrons verbally without presenting a physical card

## User Blocks

Patrons may be blocked from borrowing materials due to lost materials or fines. **Do not override patron blocks.** Direct patron to the Central Access Services to address the block.

## Fulfillment Procedures in Alma

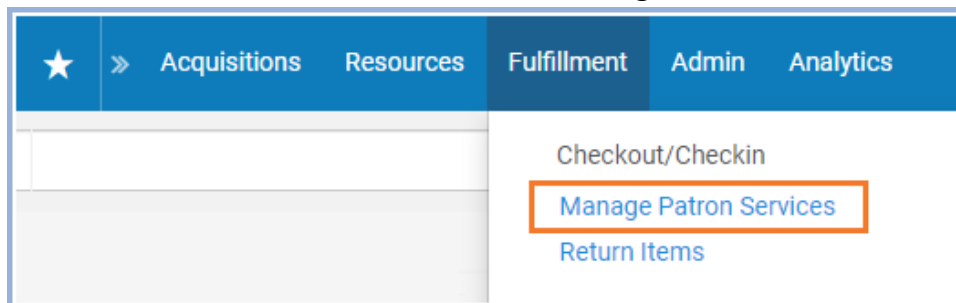
This section outlines a few of the most common Fulfillment tasks you'll perform in Alma. Your unit library may provide further training to complete further tasks. You can also visit the Alma Training page to find more training documentation and practice

### Loan Items to a patron

**Alma video:** [Working at the Circulation Desk](#)

**Try it:** [Basic Fulfillment Practice Exercises](#)

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.

### Patron Identification

Find user in other institution

Scan patron's ID or search for patron \*

Use proxy

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

Patron Services

**Fish, Stackles**

Active balance 0.00 USD [Send Activity Report](#)  
ID 20112000326602 [Send Requests Report](#)  
User group FACULTY

User Notes

- 1. User has 1 overdue item(s) in this library
- 2. User has 2 item(s) waiting for pickup at this desk.

Loans Returns Requests Network Activity

Scan item barcode \*

Loan Display : Loans of this session

No records were found.

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



Loans Returns Requests Network Activity

Scan item barcode \*

Loan Display : Loans of this session ▾

5. The checked-out items will display in a list below the **Scan item barcode** field. The patron will receive a notification email once the items are checked out to them.

Loans Returns Requests Network Activity

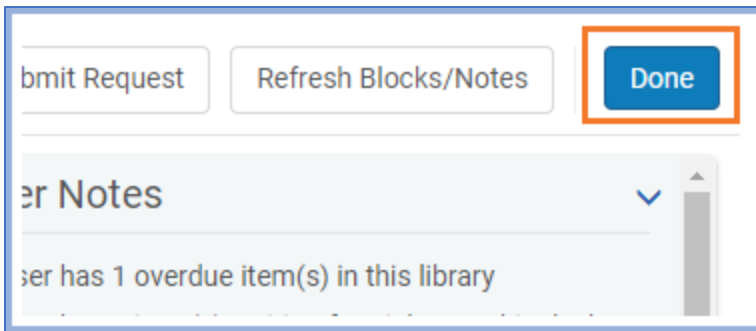
Scan item barcode \*

1 - 2 of 2 Change Due Date

Loan Display : Loans of this session ▾

<input type="checkbox"/>	Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy	Library	Loan Notes
1 <input type="checkbox"/>	Books, books, books : a treasury of clip art / Darcie Clark Frohardt.	07/14/2020 22:00:00 CDT	30112018751112	-	03/24/2020	Normal	BOOK 16/4 WKS	Main Stacks	<input type="button" value="⋮"/>
2 <input type="checkbox"/>	50+ library services : innovation in action / Diantha Dow Schull.	07/14/2020 22:00:00 CDT	30112110638076	-	03/24/2020	Normal	BOOK 16/4 WKS	Main Stacks	<input type="button" value="⋮"/>

6. Click the **Done** button in the upper right corner when you are finished.



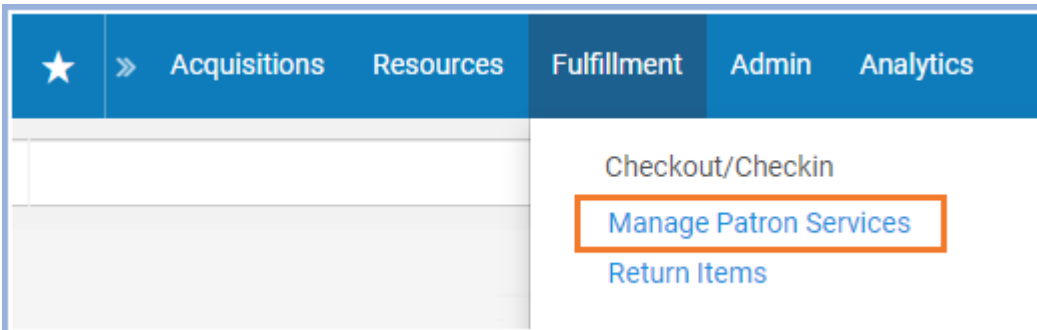
Loan items to a proxy patron

**Alma video:** [Working at the Circulation Desk](#)

**Try it:** [Basic Fulfillment Practice Exercises](#)

In this example, Stackles Fish (the proxy borrower) has come to the library to pick up books on behalf of Daenerys Targaryen (the authorizing patron).

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



2. Check the **Use proxy** button.

**Patron Identification**

Find user in other institution

Scan patron's ID or search for patron \*

Use proxy

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 ID. 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.

**Patron Identification**

Find user in other institution

Scan patron's ID or search for patron \* **Fish, Stackles - FACULTY - 20112**

Use proxy

Proxy for

- Targaryen, Daenerys
- Crowe, Russell

4. Once you have selected the correct authorizing patron, click the **Go** button. This will bring you to the "Loans" tab on the authorizing patron's page. Note that it says the name of the proxy patron next to **Proxy by**.

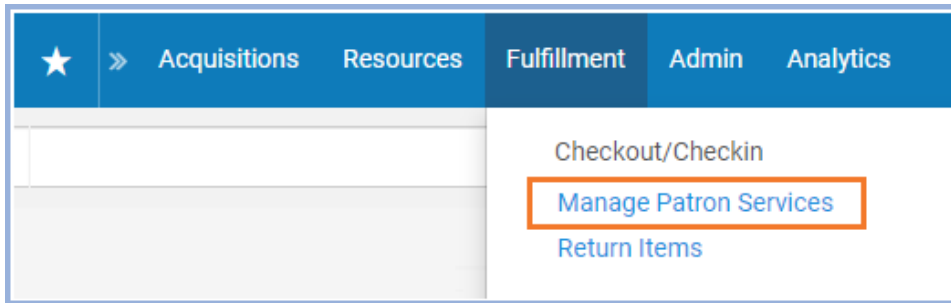
The screenshot displays the Alma interface for managing patron services. At the top, the navigation bar includes the ExLibris and Alma logos, a star icon, and a menu with options: Acquisitions, Resources, Fulfillment, Admin, and Analytics. Below this, there are icons for location, user profile, notifications, settings, help, and refresh. The main header shows 'Users' and 'All' with a search icon. The 'Patron Services' section is active, showing a user profile for 'Targaryen, Daenerys'. The profile includes a placeholder for a photo, a 'Proxy by' field set to 'Fish, Stackles', an 'Active balance' of '0.00 USD', an 'ID' of '20112000204239', and a 'User group' of 'FACULTY'. There are buttons for 'Send Activity Report' and 'Send Requests Report'. To the right, there is a 'User Notes' section with an 'Add Note' button. Below the profile, there are tabs for 'Loans', 'Returns', 'Requests', and 'Network Activity'. A yellow highlighted area contains a 'Scan item barcode' field with a search icon and the text 'Look-up or select', followed by a menu icon and an 'OK' button. At the bottom, there is a 'Loan Display' dropdown menu set to 'Loans of this session'.

5. Scan the item barcodes into the **Scan item barcode** field to check them out on the authorizing patron's account. The authorizing patron will receive a notification email when the items are checked out to them.
6. Click the **Done** button in the upper right corner when you are finished.

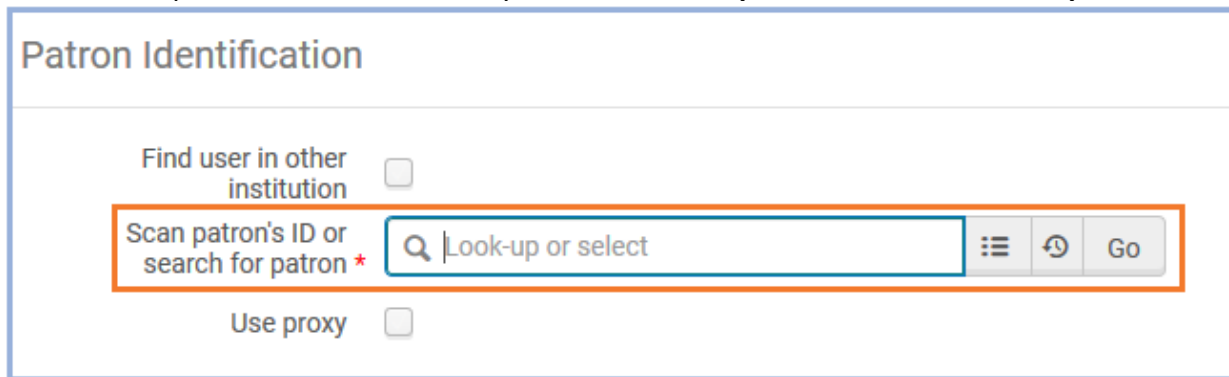
## Renewing items

**Alma video:** [Working at the Circulation Desk](#)

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.

Patron Services

Edit User Info Submit Request Refresh Blocks/Notes Done

 **Fish, Stackles**

Active balance 0.00 USD Send Activity Report  
 ID 20112000326602 Send Requests Report  
 User group FACULTY

User Notes

1. User has 1 overdue item(s) in this library
2. User has 2 item(s) waiting for pickup at this desk.

Loans Returns Requests Network Activity

Scan item barcode \*

Loan Display : Loans of this session

No records were found.

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

Loans Returns Requests Network Activity

Scan item barcode \*   Create Item

1 - 1 of 1 Search Renew Selected Renew All Change Due Date

Loan Display : All loans

	Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy	Library	Loan Notes
1	<input type="checkbox"/> Snow show / edited by Lance Fung.	10/02/2020 18:00:00 CDT	30112073972470	-	12/09/2019	Normal	BOOK 16/4 WKS	Main Stacks	✓

- 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.

The screenshot shows the Alma library system interface. At the top, there are tabs for 'Loans', 'Returns', 'Requests', and 'Network Activity'. Below the tabs is a search bar with the text 'Scan item barcode \*' and an 'OK' button. To the right of the search bar is a 'Create Item' button. Below the search bar is a table of loans. The table has columns for 'Title', 'Due Date', 'Barcode', 'Fine', 'Loan Date', 'Loan Status', and 'Item Policy'. The first row shows a loan for 'Snow show / edited by Lance Fung.' with a due date of '10/02/2020 18:00:00 CDT', barcode '30112073972470', and a loan date of '12/09/2019'. A context menu is open over the first row, with the 'Renew' option highlighted. Other options in the menu include 'Work Order', 'Loan History', 'Lost', 'Claimed Return', 'Delete Loan', 'Change Due Date', 'View Notes', 'View Queue', 'View Policies', and 'View hidden'.

	Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy
1	Snow show / edited by Lance Fung.	10/02/2020 18:00:00 CDT	30112073972470	-	12/09/2019	Normal	BOOK 16/4 WKS

- 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.

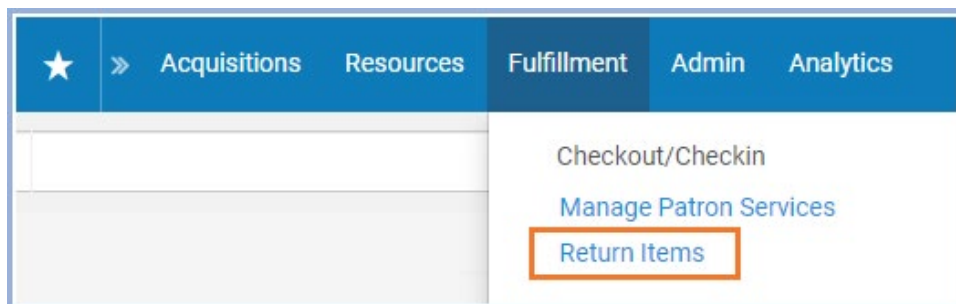
The screenshot shows a success message box with a green checkmark icon. The text reads 'Loan was successfully renewed'. Below the text is a checkbox labeled 'Collapse by default'. The message box has a close button (X) and a right arrow button.

## Returning items

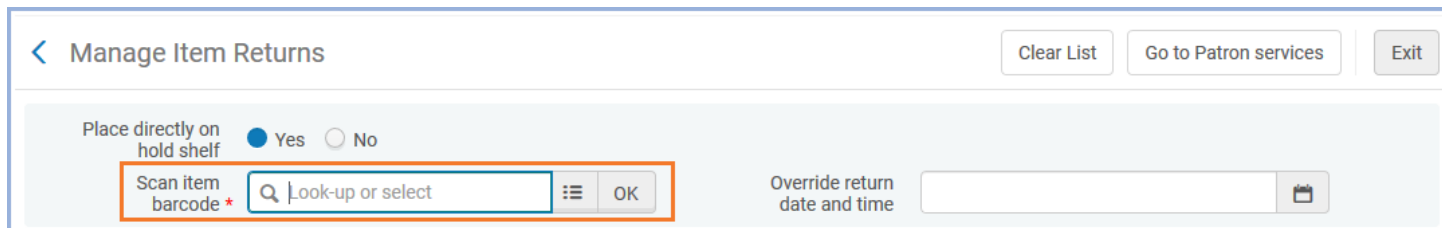
**Alma video:** [Working at the Circulation Desk](#)

**Try it:** [Basic Fulfillment Practice Exercises](#)

1. Go to **Fulfillment** and select **Return Items**.



2. Scan 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.



Alma

Acquisitions Resources Fulfillment Admin Analytics

The items destination is:

The item's destination is: **On Hold Shelf for Snape, Severus**  
**(20112000204221)**


Ok

3/26/2020 Manage Item Returns


**THIS IS AN ALMA TEST**  
Process it in Alma, NOT in Voyager.  
Questions? Contact support@carli.illinois.edu

**Location: Main Stacks - Stacks**  
**Call Number: 808.042019 B79W**

**Item Barcode:**  
30112003357107  
Writing and sense of self : identity negotiation in writing workshops /  
By: Brooke, Robert,  
Material Type: BOOK  
Inventory Material Type: Book  
**Requested For:** FC  
**Destination:** Main Stacks - Main Stacks  
**Request Type:** Patron physical item request  
**Request ID:** 5419980710005899  
**Patron ID at Item's Institution:**  
20112000204221

  
Letter 51


**THIS IS AN ALMA TEST**  
Process it in Alma, NOT in Voyager.



https://i-share-ua.alma.exlibrisgroup.com/fullaction/pageAction.do?xmlFileName=loan\_fulfillment\_checkout.xml&pageViewMode=Edit&operation=LOAD 1/1

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**Print** 1 sheet of paper

Destination  HP ENVY 5000 series ▾

Pages All ▾

Copies 1

Layout Portrait ▾

Color Color ▾

More settings ▾

**Print** **Cancel**

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

Manage Item Returns Clear List Go to Patron services Exit

Place directly on hold shelf  Yes  No

Scan item barcode \*  OK Override return date and time

1 - 2 of 2 Share Settings

Title	Return Date	Due Date	Barcode	Loaned Date	Patron	Next Step	Owned By Library	Loan Notes
1 Writing and sense of self : identity negotiation in writing workshops / Robert E. Brooke.	03/10/2020	04/07/2020 22:00:00 CDT	30112...	02/04/2020	Darcy, Fitzwilliam	On Hold Shelf	Main Stacks	
2 Theories of cinema : 1945-1995 / Francesco Casetti ; translated by Francesca Chiostrì and Elizabeth Gard Bartolini-Salimbeni, with Thomas Kelso.	03/10/2020	06/30/2020 22:00:00 CDT	30112...	01/03/2020	Fish, Stackles	Reshelve to Stacks	Main Stacks	

5. Alma will also provide details about the “Next Step” for each item.

Manage Item Returns

Clear List    Go to Patron services    Exit

Place directly on hold shelf  Yes  No

Scan item barcode \*      Override return date and time

1 - 2 of 2

Title	Return Date	Due Date	Barcode	Loaned Date	Patron	Next Step	Owned By Library	Loan Notes
1 Writing and sense of self : identity negotiation in writing workshops / Robert E. Brooke.	03/10/2020	04/07/2020 22:00:00 CDT	30112...	02/04/2020	Darcy, Fitzwilliam	On Hold Shelf	Main Stacks	...
2 Theories of cinema : 1945-1995 / Francesco Casetti ; translated by Francesca Chiostrì and Elizabeth Gard Bartolini-Salimbeni, with Thomas Kelso.	03/10/2020	06/30/2020 22:00:00 CDT	30112...	01/03/2020	Fish, Stackles	Reshelve to Stacks	Main Stacks	...

6. When you're finished checking in items, click the **Exit** button in the upper right corner.

## Placing Requests

To place a request on a patron's behalf, you may need to follow different directions based on the type of item that you're requesting. See directions below for requesting local, UIUC library items as well as I-Share items through the Automated Fulfillment Network.

**Alma video:** [Physical Item and Move Requests](#)

**Try it:** [Requesting Items Practice Exercises](#)

Requesting local items (items from any library on campus)

1. You can use the persistent search bar at the top of the page to find the item that the patron needs.

Physical titles ▾ Title ▾ bell jar X 🏠 🔍 Advanced ▾

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

Facets ‹‹

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**Material Type** ▾  
Book (31)

**Resource Type** ▾  
Book - Physical (30)  
Manuscripts - Electr... (1)

**Language** ▾  
English (30)  
French (1)  
Multiple languages (1)

**Publication Year** ▾  
1970 - 1980 (7)  
1983 - 1991 (7)  
1992 - 1999 (7)  
[+ More \(2\)](#)

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.

Physical titles | Title | bell jar

Facets << < Physical Titles (1 - 7 of 7) | bell jar Save Query

Material Type Book (7)

Publication Year 1992 (1) 1994 (1) 1996 (1) 1997 - 1999 (4)

Institution Network Community

Sort by: Rank Secondary Sort by: Rank Expand

Resource Type: Book - Physical Language: English Publication Year: 1992 - 1999 Clear all

1 The bell jar / Sylvia Plath ; foreword by Frances McCullough ; biographical note by Lois Ames ; drawings by Sylvia Plath. Edit Record Holdings ...

Book By Plath, Sylvia. (New York : Perennial Classics 1999.) Language: English MMS ID: 9949436353405899  
ISBN: 0060930187 and

4. After you find the correct item record, click the **Row Action (...)** button in the upper right corner and select **Request**.

7 The bell jar, a novel of the fifties / Linda Wagner-Martin. Edit Record Holdings ...

Book By Wagner-Martin, Linda. (New York : Twayne ©1992.) Language: English MMS ID: 9935453003

Subject: Bell jar (Plath, Sylvia) Plath, Sylvia-1932-1963-The bell jar Plath, Sylvia.-Bell jar. and others ISBN: 0805780912 and others

Series: Twayne's masterwork studies ; no. 98. Record number: 1816194-01 carli\_network

Modification Date: -

Creation Date: 09/10/2019 04:29:27 CDT

Physical (1) Other details

Items Request Publishing information Linked Data Add Reminder Display in Discovery

5. In the **Request Type** drop-down menu, select **Patron physical item request**.

< Create Request Cancel Submit

The bell jar, a novel of the fifties / Linda Wagner-Martin. ▾

**Institution** University of Illinois at Urbana-Champaign (UIU) –Champaign and Urbana, IL

Create Request ▾

Request Type \*  ▾

- Booking request
- Move permanently
- Move temporarily
- Patron digitization request
- Patron physical item request**
- Staff digitization request

6. Selecting this option will expand the screen with more options to complete the request.

The bell jar, a novel of the fifties / Linda Wagner-Martin. ▼

**Institution** University of Illinois at Urbana-Champaign (UIU) –Champaign and Urbana, IL

**Create Request** ▼

Request Type \* **Patron physical item request** ▼

Requester \*  ☰ ↻

Note

Pickup Institution \* **My Institution: University of Illinois** ▼

Pickup At \*

**Additional Request Attributes** ▼

Material Type

Date Needed By  📅

Loan Period

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



The screenshot shows a 'Create Request' form with the following fields:

- Request Type \***: A dropdown menu with 'Patron physical item request' selected.
- Requester \***: A text input field containing '20112000326602'. To the right of the input are three icons: a list icon, a refresh icon, and a search icon.
- Note**: A large empty text area for additional information.

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

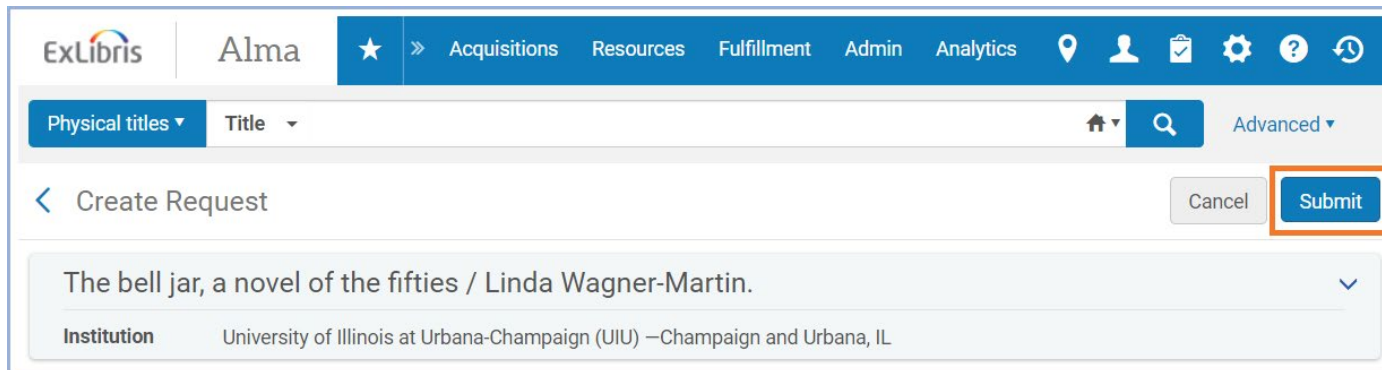
The screenshot shows the 'Create Request' form after the patron's name has been selected:

- Request Type \***: A dropdown menu with 'Patron physical item request' selected.
- Requester \***: A text input field containing 'Fish, Stackles'. To the right of the input are three icons: a close icon (X), a list icon, and a refresh icon.
- Note**: A large empty text area for additional information.

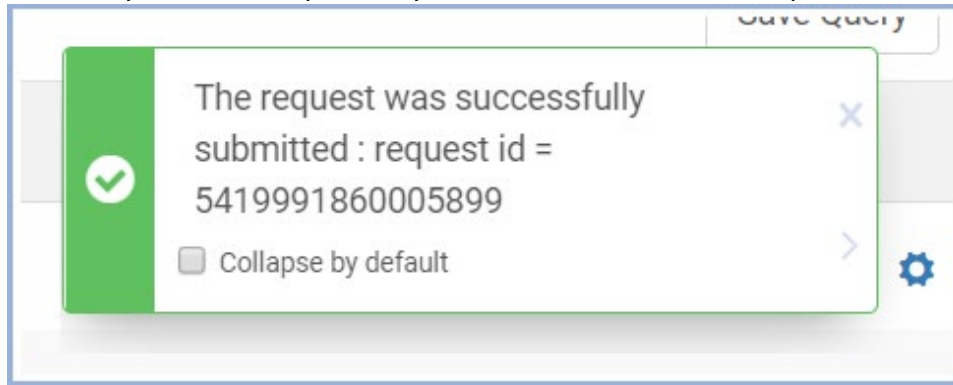
9. Ask the patron where they would like to pick up the item, and select that option from the **Pickup At** drop-down menu.

10. 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.

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



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



Requesting items through the Automated Fulfillment Network (AFN)

**Try it:** [Requesting Items Practice Exercises](#)

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.

Facets <<

---

**Material Type** ▾  
Book (31)

**Resource Type** ▾  
Book - Physical (30)  
Manuscripts - Electr... (1)

**Language** ▾  
English (30)  
French (1)  
Multiple languages (1)

**Publication Year** ▾  
1970 - 1980 (7)  
1983 - 1991 (7)  
1992 - 1999 (7)  
[+ More \(2\)](#)

- 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.

The screenshot shows a library search interface. At the top, there's a search bar with 'All titles', 'Title', and 'Astronomy' selected. Below the search bar, there are navigation tabs for 'Institution', 'Network', and 'Community'. The search results are sorted by 'Rank'. Three facets are applied: 'Resource Type: Book - Physical', 'Language: English', and 'Publication Year: 2016 - 2019'. Two search results are visible:

- 1** [Astronomy / senior contributing authors: Andrew Fraknoi, Foothill College, David Morrison, National Aeronautics and Space Administration, Sidney C. Wolff, National Optical Astronomy Observatory \(Emeritus\).](#)  
**Book (Book - Physical) text; unmediated; volume** By Fraknoi, Andrew, (Houston, Texas : OpenStax, [2017])  
**Subject:** Astronomy--Textbooks. Textbooks.  
**Creation Date:** 08/30/2019 17:40:43 CDT  
**Modification Date:** -  
**ISBN:** 9781938168284 and others  
**Record number:** 17843607-01carli\_network  
**Language:** English  
**MMS ID:** 991018526639705816  
Electronic Digital Held by (1) Other details
- 2** [Astronomy today / Eric Chaisson, Steve McMillan ; with contributions by Emily Rice.](#)  
**Book (Book - Physical) text; unmediated; volume** By Chaisson, Eric, (NY, NY : Pearson, [2018])  
**Subject:** Astronomy--Textbooks. Astronomy. Textbooks.  
**Edition:** 9 e.  
**Creation Date:** 08/29/2019 19:38:22 CDT  
**Modification Date:** -  
**ISBN:** 9780134450278 and others  
**Record number:** 17898016-01carli\_network  
**Language:** English  
**MMS ID:** 991020976019705816  
Electronic Digital Held by (1) Other details

At the bottom, there is a pagination control showing '1 of 6'.

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

1 [Astronomy / senior contributing authors: Andrew Fraknoi, Foothill College, David Morrison, National Aeronautics and Space Administration, Sidney C. Wolff, National Optical Astronomy Observatory \(Emeritus\).](#) [Edit Record](#) [Resource sharing request](#) [...](#)

**Book {Book - Physical} text; unmediated; volume** By Fraknoi, Andrew, (Houston, Texas : OpenStax, [2017]) **ISBN:** 9781938168284 and others **Language:** English

**Subject:** Astronomy--Textbooks. Textbooks. **Record number:** 17843607-01carli\_network [v](#) **MMS ID:** 991018526639705816

**Creation Date:** 08/30/2019 17:40:43 CDT

**Modification Date:** -

[Electronic](#) [Digital](#) [Held by \(1\)](#) [Other details](#)

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

**Request Attributes**

**Title** **Astronomy / senior contributing authors: Andrew Fraknoi, Foothill College, David Morrison, National Aeronautics and Space Administration, Sidney C. Wolff, National Optical Astronomy Observatory (Emeritus).**

**Requester \***  [...](#)

**Request Status**  [v](#)

**Requested Media**  [v](#)

**Preferred Send Method**  [v](#)

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

Requester \* Fish, Stackles - FACULTY - 201120003 X ☰ ⓘ

Owner \* Resource Sharing Library ▼

Requested Format Physical ▼

Allow Other Format

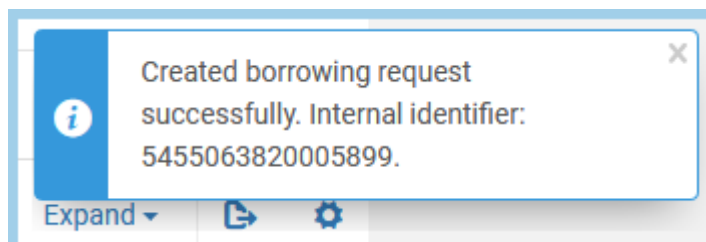
Language ▼

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 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.

< Resource Sharing Borrowing Request Save and Edit Cancel Save

General Information Parameters

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



## Circulation Glossaries

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.

### General Library Terms

#### **UIUC (UIU)**

This of course refers to the University of Illinois at Urbana-Champaign. It is often used to refer to all unit libraries at the University of Illinois. You can find a map with all unit libraries marked here:

<https://maps.google.com/maps/ms?msid=203606777912463730165.0004738d4d2e27209474a&msa=0&dg=feature>

#### **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 of I-Share libraries is available here:

<http://www.carli.illinois.edu/membership/mem-lib/ishare-map>

#### **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:

<http://www.carli.illinois.edu/membership/mem-lib/>.

## **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:

<https://www.library.illinois.edu/interlibrary-loan/>

## **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 UIUC's OPAC as well as I-Share's OPAC.

## **Alma**

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

## **Primo**

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

## **Pick slip/Pick list**

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

## **Hold**



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

### **Loan**

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

### **Return**

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

### Library Alma Glossary

This glossary has been developed by staff during our migration to Alma in June 2020. It is still being updated as we learn more about Alma.

<https://www.library.illinois.edu/staff/alma/illinois-alma-glossary/>

### CARLI Alma Glossary

CARLI's glossary is very comprehensive! If you're curious about a specific term you see in Alma, this is another great resource.

<https://www.carli.illinois.edu/products-services/i-share/alma/glossary>

## Helpful Links

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

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

**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](mailto:circlib@library.illinois.edu)**