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.

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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 <u>business</u> 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 <u>business</u> 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 <u>business</u> 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 BIOK 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

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.

3. Patron records 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. The patron will receive a notification email once the items are checked out to them.

	Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy	Library	Loan Notes	
1	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		...
2	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		...

6. Click the **Done** button in the upper right corner when you are finished.
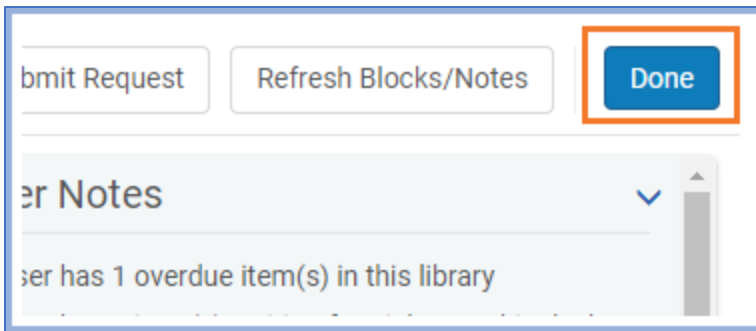
Loan items to a proxy patron

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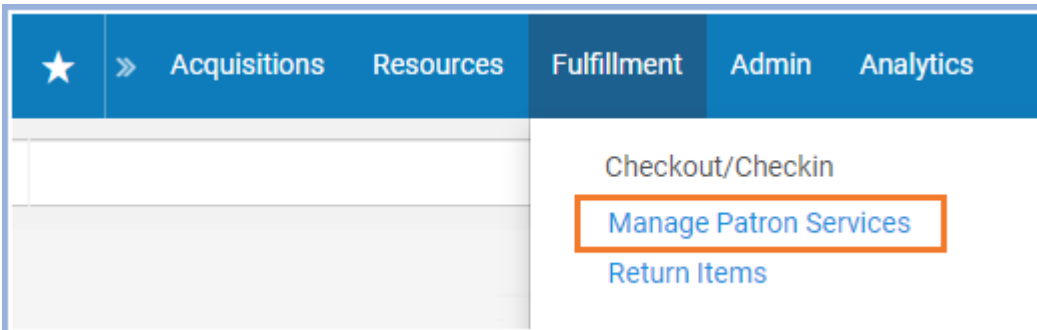
2. Check the **Use proxy** button.

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.

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**.

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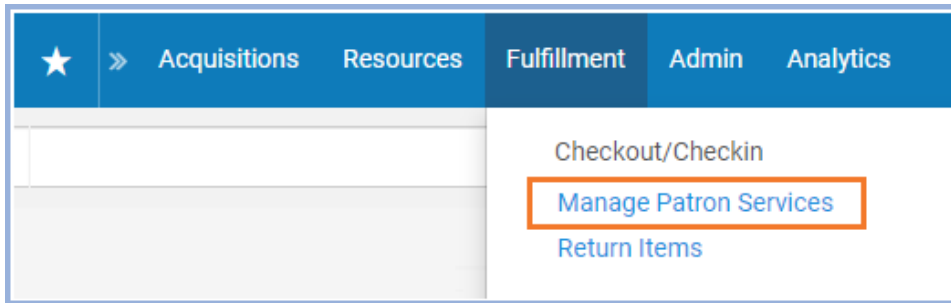
2. Scan the patron's i-card or courtesy card in the **Scan patron's ID or search for patron** field.

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

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.
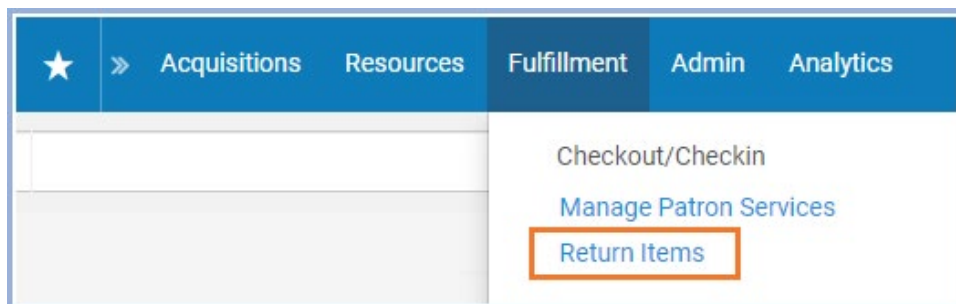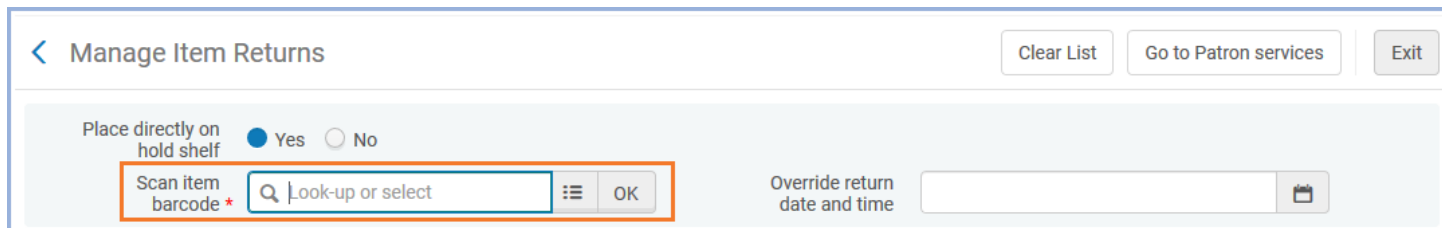
Returning items

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.

The items destination is:

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

(20112000204221)

Ok

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

CARLI I-Share

Letter 51

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

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.

	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 Chiostri 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.

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.

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 **Row Action (…)** button in the upper right corner and select **Request**.

5. In the **Request Type** drop-down menu, select **Patron physical item 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 *	🔍 Look-up or select ☰ ↺
Note	
Pickup Institution *	**My Institution: University of Illinois** ▼
Pickup At *	▼

Override On Shelf Request Policy

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.

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

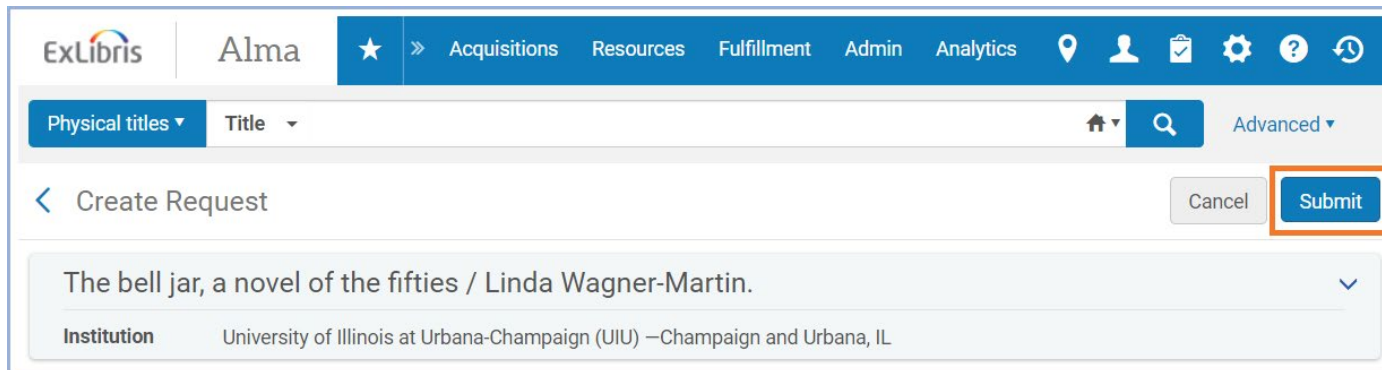9. Ask the patron where they would like to pick up the item, and select that option from the **Pickup At** drop-down menu.

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.
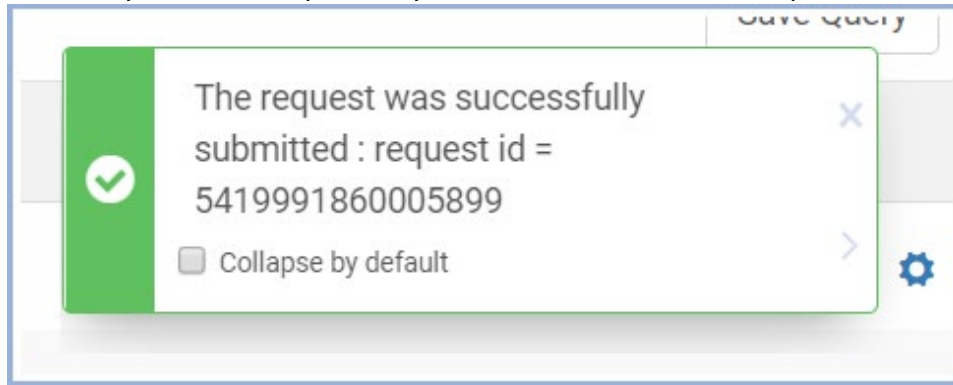
Requesting items through the Automated Fulfillment Network (AFN)

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.

| All titles ▾ | Title ▾ | | 🎋▾ 🔍 | Advanced ▾ |

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)

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

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.
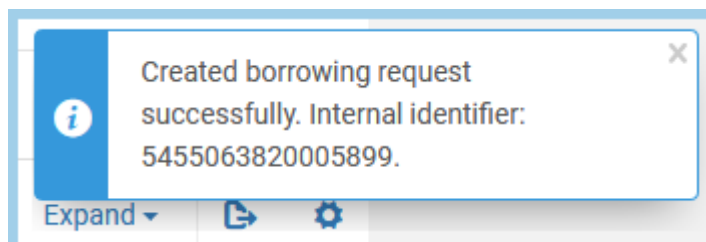
Circulation Glossaries

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-libs/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-libs.

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 reshelved 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	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/
Stacks Access	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