Alma Essentials: Fulfillment - Day-to-Day Operations

Training Materials

- [Loaning]
- [Renewals and Returns]
- [Physical Requests]

Hands-on Exercises

Roles needed for these exercises: Circulation Desk Operator

Using your sandbox, **sign in as AlmaUser01** (or any account with the **Circulation Desk Operator** role) and complete the following exercises. Ensure that you are in the **Main Library - Main Library Circulation** location. You can do this by clicking on the location icon in the upper right-hand corner and selecting this location (if it is not already selected). Note that the location setting makes all the difference. The ability to manage patron services or return items is dependent upon being at a circulation desk.

For these exercises, you may choose to either use the initial prompt to complete the activity on your own, or if you prefer, follow the step-by-step instructions.

Exercise #1: Check out an item to a patron

1. **Fulfillment > Checkout/Checkin > Manage Patron Services**
2. Enter/scan the patron's primary identifier or search for the patron.
3. Click **Go** or press the Enter key.
4. On the Patron Services screen **Loans** tab: **Scan item barcode** field
    a. Scan or enter an item barcode.
    b. Choose the **Select from a list** option to do a repository search.
5. Click **OK** or press the Enter key if not using a scanner configured with an automatic carriage return.
6. Some items to note:
    a. **Loan Display: Loans of this session/All loans** affects which loans are displayed.

    b. **User Notes** includes system generated notes and notes in the user record.
    c. **Due Date** is determined by fulfilment rules.
7. Right click anywhere on the row or click the row actions menu (ellipsis) of the loaned resource.
8. Select **View policies** to see all the information applied to this loan (due date, grace period, renewable, fine and fee, etc.).
9. Clicking **Done** sends the loan receipt to the patron (if configured) and closes the Patron Services screen.

Exercise #2: Renew an item

1. **Fulfillment > Checkout/Checkin > Manage Patron Services**
2. Enter patron's ID or search for patron.
3. On the Patron Services screen **Loans** tab, there are three options to renew the item(s):
    a. Select the checkbox(es) and click **Renew Selected**.
    b. Click **Renew All** without making any selections.
    c. To renew a specific item, click on the row actions menu (ellipsis) and choose **Renew**.
4. The Loan status is now Renewed.
5. You also have the option to **Change Due Date** of loaned items, but you can't choose a due date that is
    a. in the past.
    b. passed the user's expiration date.
    c. a date the library is closed (depending on configuration).

Exercise #3: Return an item

Items can be returned in two places:

1. **Fulfillment** > **Checkout/Checkin > Manage Patron Services**
    a. Enter patron's ID or search for patron.
    b. On the Patron Services screen, click the **Returns** tab.
    c. Scan/enter an item barcode.
    d. Click **OK** or press the Enter key if not using a scanner configured with an automatic carriage return.
    e. Note that the **Return Display: Returns of this session/All returns** setting affects which returns are displayed.
    f. Click **Done** to send return receipts (if configured).

2. **Fulfillment > Checkout/Checkin > Return items**
    a. Scan/enter item barcode.
    b. Depending on your role, you may be able to **Override return date and time** if the situation calls for it.
    c. Click **OK** or press the Enter key if not using a scanner configured with an automatic carriage return.

Exercise #4: Request an item

There are three ways requests can be submitted:

1. Submit a request from the title:
    a. Search for a **Physical title** in the persistent search box, then click the **Request** button to the right of the item. Note: if the request option is not displaying, click the row actions menu (ellipsis) to see all available actions.
    b. **Request Type**: choose **Patron physical item request**.
    c. **Requester**: enter a patron's name or identifier.
    d. **Pickup At**: choose an available location.
    e. Click **Submit**.
    f. If the requested item is on the shelf it shows up on the **Pick from Shelf** list immediately.

2. Submit a request from a patron's record:
    a. **Fulfillment > Checkout/Checkin > Manage Patron Services**
    b. Enter patron's ID or search for patron.
    c. On the Patron Services screen, click **Submit Request**.
    d. In the Submit Request box, click the **Select from a list** icon to search for and select a title.
    e. Choose **Patron Physical**.
    f. Choose **Pickup At:** choose an available location.
    g. Click **Submit**.

3. End users can submit a request through Discovery.

Exercise #5: Cancel a request

There are five ways a request can be cancelled:

1. In the persistent search box choose **Requests**
    a. Search for the request using any of the available indexes.
    b. Click **Cancel** in the row action menu.
    c. Choose a **Cancellation reason** and whether to **Notify user**.
    d. Click **Confirm**.

2. Cancel a request from the user's account:
    a. **Fulfillment > Checkout/Checkin > Manage Patron Services**
    b. Enter patron's ID or search for patron.
    c. On the Patron Services screen, click the **Requests** tab.
    d. Click **Cancel** from the row actions menu (ellipsis).
    e. Choose a **Cancellation reason** and whether to **Notify user**.
    f. Click **Confirm**.

3. Cancel a request from the Pick from shelf list:
    a. **Fulfillment > Resource Requests > Pick from shelf**
    b. Click **Cancel Request** next to the selected request.
    c. Choose a **Cancellation reason** and whether to **Notify user**.
    d. Click **Confirm**.

4. Cancel a request from Monitor Requests & Items Processes
    a. **Fulfillment > Resource Requests > Monitor Requests & Items Processes**
    b. Click **Cancel** in the row actions menu (ellipsis).
        i. Note: some requests may not have the option to cancel, depending on the Workflow step the request is in.
    c. Choose a **Cancellation reason** and whether to **Notify user**.
    d. Click **Confirm**.

5. End users can cancel requests through Discovery.

Note: Cancellation Reason values can be customized by administrators in **Configuration > Fulfillment > Physical Fulfillment > Request Cancellation Reasons**.

Exercise #6: Add a fine/fee to a user record

There are two ways to add fines or fees:

1. **Fulfillment > Checkout/Checkin > Manage Patron Services**
    a. Enter patron's ID or search for patron.
    b. On the Patron Services screen, click the link in the **ID** field to go to the user record.
    c. On the **Fines/Fees** tab, click **Add Fine or Fee**.
    d. Enter Fee Type and Fee Amount and click **Add and Close**.

2. **Admin > User Management > Manage Users** or use the persistent search box.
    a. Search for the user and edit the user record.
    b. On the **Fines/Fees** tab, click **Add Fine or Fee**.
    c. Enter Fee Type and Fee Amount and click **Add and Close**.

Exercise #7: Pay a fine

1. **Fulfillment > Checkout/Checkin > Manage Patron Services**
2. Enter patron's ID or search for patron.
3. On the Patron Services screen, click the **Pay** button.
4. Choose to pay **All fines** or **Specific fines**.
5. Select **Payment method** and enter **Payment amount**.
6. Click **Send**.

Exercise #8: Waive a fine

There are two ways to waive fines or fees:

1. **Fulfillment > Checkout/Checkin > Manage Patron Services**
    a. Enter patron's ID or search for patron.
    b. On the Patron Services screen, click the link in the **ID** field or the fine amount to go to the user record.
    c. On the **Fines/Fees** tab, there are three options to waive:
        i. Select the checkbox(es) and click **Waive Selected**.
        ii. Click **Waive All** without making any selections.
        iii. Click the row actions menu (ellipsis) and choose **Waive** for a specific fine or fee.
    d. Change the **Total amount to be waived** if necessary and select the **Waiving Reason**.

   e. Click **Waive**.

2. **Admin > User Management > Manage Users** or use the persistent search box.
   a. Search for the user and edit the user record.
   b. On the **Fines/Fees** tab, there are three options to waive:
      i. Select the checkbox(es) and click **Waive Selected**.
      ii. Click **Waive All** without making any selections.
      iii. Click the row actions menu (ellipsis) and choose **Waive** for a specific fine or fee.
   c. Change the **Total amount to be waived** if necessary and select the **Waiving Reason**.
   d. Click **Waive**.

Note: Waiving Reason values can be customized by administrators in **Configuration > User Management > Patron Charges > Reasons for Waiving Fine/Fee**.