Alma Fulfillment Procedures for Hagerty Service Desk

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Material is also on the LibWiki at: https://libwiki.library.drexel.edu/do/view/LibraryServices/AlmaFulfillmentTraining
#1 Alma Basics - Loans (Checking out)

1. Click on **Fulfillment** and click on **Manage Patron Services**

2. **Scan** client’s ID or **search** for client by typing last name, first name and click **GO**.
   (you can also search by DrexelOne username)
3. The client’s record will appear. Take note the **Loans tab** is highlighted and ready for items to be scanned and loaned to client (checked out)

4. a. **Scan** the item barcode and click **OK**.
   
   b. The item will appear under **Loan Display**, listing the title, due date, barcode, loan date and additional information.
   
   c. Continue with more items to be loaned or click the **Done** button when complete.

   *(Take note: if you don’t click the DONE button, the client will NOT receive their email receipt)*
#2 Alma Basics - Returns (Checking in with client present)

1. Click on **Fulfillment** and click on **Manage Patron Services**

2. **Scan** client’s ID or **search** for client by typing last name, first name and click **GO**.
   (you can also search by DrexelOne username)
3. The client’s record will appear. Click on the **Returns** tab.

4. a. **Scan** the item barcode and click **OK**.
   b. The item will appear under **Returns of this session** listing the title, date/time checked in, original due date, barcode, fines and additional information.
   c. Take note of the **Next Step** field. This information informs you where the item belongs.
   d. Continue with more items to be returned or click the **Done** button when complete.
#3 Alma Basics - Return Multiple Items (no client present)

-  *Use this process when checking in items from the book drop boxes*

1. Click on **Fulfillment** and click on **Returns Items**

2. **Scan** the item barcode and click **OK**.

3. The items will appear listing:
   a. title, return date, due date, patron and next step.
   b. Click on **Clear List** or **Exit** when done.
Alma Basics – Searching in Alma for Physical Items

- Alma allows for customizable, advanced searching
- Alma allows you to limit searches by physical or electronic/digital items
- Alma allows you to search by title, creator (author), keyword, etc.
- Alma allows you to limit to a specific location

1. To search for a specific item, start by typing in the search box.

2. If you want to limit by Physical Items (items held within the library):
   a. Click on the blue dropdown box and select Physical Items.
   b. You can also limit by title, creator (author), keyword etc. by clicking on the white dropdown box.
3. A title search for Harry Potter under Physical titles brings up 56 records. The first record will be used as an example as to how Alma defaults its search results.

Information regarding book “The law and Harry Potter” is displayed, including barcode, due date, permanent location, call number, etc. Take note all information needed is displayed without clicking on the record.

What if? If you click on the title, the following screen will appear displaying MARC information. None of this information is relevant to locating the item in the library, so there is no need to click on each title.
4. Alma allows you to limit to a specific location in the library (For example, when searching for items in the reserve collection).

- A title search for the textbook Corporate Finance under Physical titles brings up 151 records.
- To limit to only Reserves at a specific location, find the location you want to limit under Facets on the left side of the screen:

  - Clicking on WW Hagerty Library will expand the list. Under Physical Location, click on +More (5) to bring up additional locations within WW Hagerty Library. You can choose Reserves (2) for items owned by the library or Reserves (Personal Copies) (17) for items owned by professor/department in the Personal Copy collection.
- For this example, we will choose Reserves (Personal Copies)
5. Clicking on **Reserves (Personal Copies) (17)** brings up a list of **17 items** within Personal Copy collection at Hagerty Reserves.
#5 Alma Basics – Viewing a Client’s Record (items loaned/returned, requests, fines)

1. Click on **Fulfillment** and click on **Manage Patron Services**

2. **Scan** client’s ID or **search** for client by typing last name, first name and click **GO**.
   (you can also search by DrexelOne username)
3. A quick view up the client records displays the following information:
   a. Current checkout (checked out items) - the record defaults to the **Loans** tab, displaying any items loaned (checked out) to the client.
   b. Returns and Requests
   c. Active balance (fines/fees)
   d. User Notes
4. A new feature in Alma not offered in Millennium allows staff to view all items returned by a client. A.
   a. Click on the Returns tab
   b. Click on Returns of this session.

5. Click on All returns.

6. All returns by the client will be displayed. The return date, original due date and the date the item was loaned will be displayed.
7. To view requests (holds) placed by the client:
   a. Click on the Requests tab.
   b. The title, request type, request date and task will be displayed.
      *(Task is similar to STATUS in Millennium)*

8. To view the Active balance of a client (fines, charges, fees), click on the dollar amount next to active balance.

9. Fines or Fees will be displayed next to Creation date.
#6 Alma Basics – Searching Summon for Physical Items & Placing a Request (Client view)

1. Clients wanting to search for physical items will need to use Summon. For books, direct client to click on the Books and More Tab.
   - **Advanced searching** can be performed by clicking on **Advanced Search**

   - The advanced search allows the client to limit their search.
   - Clicking on “**Items in the library catalog**” will limit the search to physical items and ebooks only.
2. For example, if the client is searching for a book titled *Gnomes*, they can limit their search to **TITLE** and “**Items in the library catalog**”. Clicking on the title of the desired physical item will bring up a detailed record.

- The client can also filter their results further on the left sidebar labeled **REFINE YOUR SEARCH**.

- To filter by location (for example, Children’s location) scroll down and click **LIBRARY LOCATION**.

- To see full list of locations, click on **More**....
- Select the location by clicking on the green check mark. Click on Apply.

- The results displayed now limit the search to Gnomes within the Title in the Children’s Collection.
3. The physical item **Gnomes** is **Available** at **WW Hagerty Library** located in the **Child collection** with the call number **PT 5881.18.U9 L4713**. There is **1 copy available**, **no requests** and the **Item in Place** means it is on the shelf.

The client can **Sign In** to their **Library Record** to find out if the item can be requested.

4. After the client signs in, a **Request** option will appear. Clicking on **Request** will allow the client to place a request for this item.
5. The client will be prompted to choose:
   a. A **Pickup Location** and may choose a **Not needed after date**.
   b. When finished, the client must click the **SEND REQUEST** link.

6. A prompt will appear confirming if the request was successfully placed.
7. The client can also view this request in their Library Record by clicking their name at the top right of the page.

8. After clicking on their name, the client must choose Library Card to view their Library Record.

9. The client can view the status of their Request on the Overview page or by clicking on the Requests tab.
The **REQUESTS** page is shown below. Take note the item **Gnomes** is **In Process**. When the item is ready to be picked up, a **GREEN** bell will appear next to **REQUEST** and will indicate how long the client has to pick up their item (**On Hold Shelf Until**).

![My Library Card](image_url)

<table>
<thead>
<tr>
<th>Requests</th>
<th>Sort by</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Managing corporate reputations /</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>REQUEST. On Hold Shelf until</td>
<td></td>
</tr>
<tr>
<td></td>
<td>07/05/2018</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pick up: WW Hagerty Library</td>
<td></td>
</tr>
<tr>
<td>2. Gnomes / Huygen, Wil.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>REQUEST. In Process</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pick up: WW Hagerty Library</td>
<td></td>
</tr>
</tbody>
</table>
1. To locate the item the clients would like to request, use the search box at the top of the page.
   a. Choose **Physical Items**
   b. You can limit your search to **title, creator (author), keyword and other information** related to the item.

2. For example, to request the item **Cradle to Cradle** after searching:
   a. Click the **Options** button
   b. Click **Request**.
3. A Create Request screen will appear.
   a. You must select the **Request Type** under Create Request
   b. Next select **Patron Physical Item Request**

4. Next enter the client’s name requesting the item under **Requester**.
   (Search last name, first name or DrexelOne username)
5. Choose a **Pickup At** (location) where the client would like to pick up the book.

6. If the request processed successfully, it will be displayed on the next screen in a blue message.
#8 Alma Basics – Renewing items and changing an items due date manually

1. Click on **Fulfillment** and click on **Manage Patron Services**

2. **Scan** client’s ID or **search** for client by typing last name, first name and click **GO**.
   (you can also search by DrexelOne username)
3. The page will default to the **Loans tab** in the client record. All items currently loaned to the client will display under **All loans**.

4. To renew an item, cli:
   a. Click on the box next to the **Title** of the item to be renewed and click **Renew Selected** or **Renew All**
5. After clicking **Renew Selected**, the item “**Host bibliographic record for...**” was renewed and is indicated by the **green check mark** next to the due date and a blue pop-up message indicating: “1 loans renewed out of 1 attempted renewal”

6. Manually changing an item’s due date can be performed by:
   a. Clicking on the checkbox next to item’s **Title**
   b. Clicking on **Change due date**:
7. Next select a due date by clicking on the blank field next to New Due Date. Click on Change due date after selecting the desired date.

   *Take note: you can change the hour/minute an item is due back, but this is an optional field to be used for hourly items.*

8. After clicking Change due date, the item “What do you get when you cross a dandelion..” has the revised due date indicated by the green check mark next to the due date and a blue pop-up message indicating:

   “1 loans changed out of 1”
#9 Alma Basics – My Library Account – How to direct a client to view their library to renew books, place requests and view fines/fees.

1. Direct patron to library homepage. (The screenshot below will look different once Alma is live).
   a. Click on the Settings icon
   b. Select My Library Account.

2. The client will be asked to log in with their Drexel credentials. Click on LOGIN after entering user id and password.
3. The client account information will be displayed with the **Overview** tab highlighted. The client can get a quick view of:
- Loans/Renewals
- Requests
- Fines and Fees
- Blocks and Messages

Clicking on the separate tabs for each option will bring up a detailed display.

4. To view active or past Loans:
   a. Click on the **Loan** tab. Currently there is one book checked out and is overdue.
   b. The client can view past loans by clicking on the **down arrow** next to Active loans:
5. Next, select **Previous and historic loans**

All Previous and historic loans will be displayed including: **Title, Author, Return Date, Pick up location and Call number.**
6. If the client would like to renew the item currently overdue:
   a. Click on **Renew**:

   A confirmation message will appear in a **yellow box** with the **new due date** listed. Renewed will be displayed in **green** on the right.
7. Clicking on the Requests tab will display any items the client requested. Currently one request is In Process. The client has the option of cancelling a request if necessary.

If the item was ready for pickup, a green bell will be displayed next to the Requests tab. Next to the item requested will display the date the item will be removed from hold shelf.
The client also receives and email when the item is ready for pickup. Below is an example of the email:

**On Hold Shelf Letter**

Amano, Shin  
Drexel University Hagerty Library  
3300 Market St  
Philadelphia PA 19104  

WW Hagerty Library  
3300 Market St.  
Philadelphia  
19104  
US

Dear Sir/Madam Amano  
The following item, which you requested on 06/25/2018, can be picked up at WW Hagerty Library - WW Hagerty Desk Library Assistance Desk.  
The item will be held for you until 07/05/2018.  
Managing corporate reputations  
By: Jolly, Adam.  

Notes that may affect loan:  

Sincerely  
Client Services Department  

WW Hagerty Library

8. A client may view any fines or fees on their account by clicking on the **Fines + Fees** tab:
9. Any blocks or messages can be displayed by clicking on the **Blocks + Messages** tab:

![My Library Card](image1)

10. The client may also view their **personal details** including address/telephone number by clicking on the Personal Details tab. *(Take note: Drexel clients may not be able to edit their personal information once Alma is live)*

![My Library Card](image2)
#10 Alma Basics - Collecting payment for a fine

1. To view details of fine in a client record in Alma, scan client’s ID or search for patron by typing last name first and click GO:

2. Next to Active balance, click on the Pay button to the right of the dollar amount displayed.
3. A Payment Details screen will appear with several options:
   a. All fines or Specific fines
   b. Cash or Credit card for payment method
   c. Specific amount to be paid.

3a. Clicking on **Specific Fines** will allow you to choose individual fine/fees. Click on the **Select from a list** and choose the fine/fee to be paid.
3b. Clicking on **Payment Method** allows you select **Cash** or **Credit Card**

3c. Next to **Payment amount**, the client can pay the full amount or a partial amount. For example, if the client wants to pay half of their $25.00 fine, enter 12.50 in the **Payment Amount**. Select **Send** when finished.
4. Click on **Confirm**

5. The screen will return to the client record displaying the updated **Active Balance**.

6. The client will receive an **email receipt**, like the one below:
#11 Alma Basics - Adding a note to a client’s record

1. Click on Fulfillment and click on Manage Patron Services

2. Scan client’s ID or search for client by typing last name, first name and click GO. (you can also search by DrexelOne username)
3. To add a note, click on the scroll bar to the right of the User Notes box.

4. Scroll down until you see **Edit Notes** and then select.

5. The next screen will display **Notes** for the client account. Click on **Add Note**
6. Add the text under **Note**. Select the **Type** of note. Select whether you want the user to **view the note**. Click **Add and Close** when done. *For example: “Laptop Letter”, Type: Library, User viewable: No*
#12 Alma Basics – Search Results Customized

1. To make it easier for our Circulation work study students, we can **customize** the search results to only show pertinent information for quickly locating the book. For example, by clicking on the **Setting** button:

![Setting button]

2. A **Customize view** screen will display. You can select which fields are displayed after searching for an item. Currently all fields are selected.

![Customize view screen]
3. For example, to limit the amount of information in a search result, you can
   a. Uncheck the fields not to be displayed. You can also limit the number of Columns displayed.
   b. Click Save when finished.

4. The updated search results will show only the fields you selected to be displayed for each item.
5. You can return to the default search results display by going back to the settings menu.
   a. Click Restore list defaults
   b. Click Save.
#13 Alma Basics – Creating an Alumni or UPenn account in Alma

1. Click on the Register New User button.

2. Begin filling out the following under USER INFORMATION:
   - **First name** (required)
   - **Last name** (required)
   - **Middle name** (optional)
   - **Title** (optional)
   - **Primary Identifier** (required) - Remove the automatic number placed in this field AND SCAN the barcode that was placed on the blank library card.
   - **User Group** (required) - ALUMNUS or UNIV OF PENN STUDENT
   - **Expiration date** (required): one year from present date for alumni / For UPENN, enter the date filled out on reciprocal borrowing letter issued by UPenn Libraries.
   - You can skip the other fields in User Information
3. Under **USER MANAGEMENT INFORMATION**, type in a generic password and let the client know to use the generic password when signing in for the first time. *(example of a generic password would be Password1234 or the client’s last name)*. Click on **Force password change on next login**.

4. Under **EMAIL ADDRESSES**, choose a type of email and enter the client’s email address. Under **ADDRESSES**, choose an address type and enter address starting with “Address line 1”. Under **PHONE NUMBERS**, select a type of phone number and enter client’s phone number.

5. When finished, click on **UPDATE USER**.
#14 Alma Basics – In House Use (count use) – Using “Scan In Items”

1. The In House Use option under Scan In Items allows items not checked out, but used by a client or staff member to get a statistic added to its record indicating its use.

   - Under the Fulfillment menu, select Scan In Items under Resource Requests

2. Before scanning the item, ensure the Register in-house use box is checked. After scanning or typing in the barcode, click OK.

3. The item’s Title, Destination and Barcode will be displayed.
   (Take note, if the item was checked out to a client, it will not be checked in and indicated under Checked In)
4. Grab a **blank locker form** from the **gray file holder** and the **green locker box** located to the right of the holder. (You may also grab the locker location chart on the second row from the blank lockers forms)

- You may also grab the locker location chart (in the gray file holder below the locker forms) to help the client decide on what locker they would like to pick.
- The lockers are sorted by floor and top, middle, bottom for location in the locker box.
- select a specific locker number based on the location chart or a specific locker from the chart (if it is available)

1b. Write down the locker number on the form.
2. Click on **Fulfillment** and click on **Manage Patron Services**

3. **Scan** client’s ID or **search** for client by typing last name, first name and click **GO**.

4. Scan the barcode on the locker card

5. A window will appears displaying five combinations with a letter in front. **Write down the first combination in the list on the locker form:**
6. The locker will be checked out under the client’s Loans tab. **IGNORE DUE DATE and inform client they will receive a renewal email two weeks before the term is over.** The due date will change after the locker form is processed by OJ.

7. Write down the clients name, the date and ask the client if they’d like the locker for one term or two terms. Check the corresponding box. Pass the form to the client to fill out their ID number and sign the form.

---

**LIBRARY COPY**

**LOCKER RENTAL AGREEMENT**

WE ARE NOT RESPONSIBLE FOR LOST ITEMS

<table>
<thead>
<tr>
<th>LOCKER #</th>
<th>COMBO</th>
<th>STAFF INITIALS</th>
</tr>
</thead>
</table>

**NAME:**

**RENTAL LENGTH**

- [ ] One Term: $10.00
- [ ] Two Terms: $15.00

**TODAY’S DATE:**

**ID NUMBER:**

**CLIENT SIGNATURE:**

I recognize that Denver University assumes no responsibility for the loss of any property, and I agree that the Library has the right to check the contents of its lockers at any time for Library material. ITEMS SUCH AS REFERENCE BOOKS, JOURNALS, OVER-DUE BOOKS, RESERVE ITEMS, CAREER BOOKS, AND MATERIALS THAT HAVE NOT BEEN CHECKED OUT SHOULD NOT BE PLACED IN LOCKERS. If such items are found, I may be charged the cost of that item.

I have the option to return my locker at the end of each cycle. If renewal is not requested by the last day of finals, my locker will be canceled and any prepaid property will be sent to me. ALL ITEMS WILL BE DISCARDED.

---

**PATRON COPY**

**LOCKER RENTAL AGREEMENT**

WE ARE NOT RESPONSIBLE FOR LOST ITEMS

<table>
<thead>
<tr>
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<th>COMBO</th>
<th>STAFF INITIALS</th>
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</thead>
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**RENTAL LENGTH**

- [ ] One Term: $10.00
- [ ] Two Terms: $15.00

**HOW TO OPERATE LOCKER:**

1. Rotate dial to the **RIGHT** three complete turns resting on the first number of your locker combination.

2. Rotate dial to the **LEFT** passing the first number only once resting on the second number.

3. Rotate dial to the **RIGHT** past the final number, not passing the second number, and the locker should open.

Please use the Circulation Desk for any assistance. Thank you!
8. Under **Patron Services**, Click on the **dollar amount** next to **Active Balance**

9. Click in Add Fine or Fee

10. The **Add Fine or Fee** window will display. Click on the dropdown box:
11. Select Locker Key

12. Enter the amount under Fee Amount. Type the locker # and number of terms in the Comment box. Click Add and Close.

13. Locker Key will appear under Fine/Fee with the Locker number and # of terms under Comment. Click Save
14. The Patron Services page will reappear. Click on PAY next to the dollar amount under **Active Balance**.

15. Complete the Payment Details window by selecting Cash or Credit.  
   *(TAKE NOTE, credit card transactions should ‘be completed in TouchNet before this step to ensure the payment is processed).*
   
   Click Send when complete. A confirmation window will appear, click Confirm.

16. You can now exit out of the client record in Alma by clicking the Done button.
   If the payment was cash, enter transaction into PHP under Lockers:
#15b Alma Basics – Lockers – Renewals

1. Locate the Locker Renewal list located on a clipboard in the gray file holders to the right of the pillar. Clients on the renewal list are in alphabetical order by last name. Locate their name and associated locker number.

<table>
<thead>
<tr>
<th>Patron Name</th>
<th>Locker</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kochunilathil, Merlin S</td>
<td>#267</td>
</tr>
<tr>
<td>Koku, Emmanuel F</td>
<td>#307</td>
</tr>
<tr>
<td>Kopala, Dustin J</td>
<td>#217</td>
</tr>
<tr>
<td>Kulasegram-Wilson, Andrew J</td>
<td>#246</td>
</tr>
<tr>
<td>Lee, Jong Chan</td>
<td>#403</td>
</tr>
</tbody>
</table>

2. Ask the client how many terms they would like to renew for. 1 term = $5.00 / 2 terms = $10.00. Client signs their name on the box for the renewal (both boxes for two terms)

<table>
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<td>#403</td>
</tr>
</tbody>
</table>

3. Write the amount the client is paying, your initials and the date.

<table>
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</thead>
<tbody>
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</tbody>
</table>

4. Click on Fulfillment and click on Manage Patron Services
5. **Scan** client’s ID or **search** for client by typing last name, first name and click **GO**. 
   **Click on the dollar amount** next to **Active Balance**

6. Click in **Add Fine or Fee**

7. The **Add Fine or Fee** window will display. Click on the dropdown box:
8. Select **Locker Key**

9. Enter the **amount** under Fee Amount. Type the locker # and number of terms in the **Comment** box. **Click Add and Close.**

10. **Locker Key** will appear under Fine/Fee with the Locker number and # of terms under Comment. **Click Save**
11. The Patron Services page will reappear. Click on **PAY** next to the dollar amount under **Active Balance**.

![Image of Patron Services page with a red arrow pointing to the Pay button]

12. Complete the Payment Details window by selecting Cash or Credit.
   
   *(TAKE NOTE, credit card transactions should be completed in TouchNet before this step to ensure the payment is processed).*

   Click Send when complete. A confirmation window will appear, click Confirm.

   ![Image of Payment Details window with a red arrow pointing to the Cash option]

   ![Image of Confirmation window with a red arrow pointing to the Confirm button]

13. You can now exit out of the client record in Alma by clicking the **Done** button.

   If the payment was cash, enter transaction into PHP under Lockers:

   ![Image of Sales Register window with a red arrow pointing to Lockers (1 term)]