ALMA FULFILLMENT TRAINING: SESSION II
ANY QUESTIONS FROM SESSION I?

In Review from Session I:

• Navigation and Repository Searching
• Using the “Currently at”
• Fulfillment Menus
• Physical Item Repository Search
• Patron Records:
  • Parts of…
  • adding notes
  • Functions
  • creating new
• Nouveau Franklin
LOAN/RETURN

• Loan:
  • Corresponding Voyager term is “Charge”
  • Loan from Patron record – Loan Tab

• Lost status – only applies to a loan; when it applies to an item it is “missing”
• Claim Return – Must be associated with an active loan; once the loan is returned the claim return will disappear. Suggested workflow: any notes about claim returns should be kept at the patron record level, not on the loan itself
• Delete loan – deletes the item from the loans tab. The item status changes from “lost” to “missing” and all other loans will move “item in place”. We suggest avoiding this action.
• Change due date – works in a similar manner as it did in Voyager.
• **Proxy**
  - Same term used in Voyager
  - Set up from the User Details page – “proxy for” tab

• **Return:**
  - Corresponding Voyager term is “Discharge”
  - Return from two different screens:
    - Return items screen
    - Patron record – Return Tab
FINES/FEES

- Similar to voyager they can be associated with a loan or just a patron
- Pay and view details from the patron record with user appropriate permissions
- Details and other actions through the User details link (primary identifier hyperlink on patron record) with appropriate permissions
FINES/FEES

Action Menu:

• Add – use to add additional fines and fees to a patron account absent an active loan (i.e. damaged item fee); however you can “link to item” by choosing that option in the action menu.

• Pay – straightforward; whether or not you can accept credit or debit is configured; When paid the item moves to “closed” status and the tender for the transaction is indicated in the “fine/fee type.” only indication that the fee was paid rather than waived.

• Dispute – removes fines/fees from the patron’s active balance while the charge is being investigated.

• Waive – similar to Voyager’s forgive feature. Removes fee amount from “active balance” and places it in the “closed” status; Advice: indicate in the “comments” more specific reason for waiving fine.
REQUESTS:

• Defined the same as in Voyager

• Types of requests:
  • Patron physical item request
  • Moves: permanently or temporary
  • Digitization Requests: patron initiated or staff initiated
  • Work Orders: staff initiated; used to indicate an item needs special attention

• How are requests initiated:
  • Via Nouveau Franklin and the “Request it” menu
  • Staff initiated through ALMA via a Repository Search
REQUESTS: PICKUP FROM SHELF TASK LIST

• Any request placed for pick up or associated with a library/location will appear in that department’s “Requests - pickup from shelf” task list.

• For example, if a patron requested a Van Pelt book for pick up at Fine Arts, the item will appear in the Van Pelt Library “Requests – pickup from shelf” task list.
  • This alerts the appropriate staff member that this item needs to be removed from the Van Pelt stacks and sent to the pick up location designated in the request (Fine Arts).

• Clicking the “Select ALL” box at the top of the list, choosing “print slip” from the drop down menu, click the “Execute button” will print individual slips for all of the items on the list.
REQUESTS: HOLD SHELF MANAGEMENT

• Once the item is delivered to the home library’s circulation desk and scanned via the “Scan in item” feature, a transit slip will print with the designated library at the top.

• Once the item arrives at the designated pickup location, and the barcode is scanned again, via the “Scan in item” feature, a hold slip, or call slip, will print with the patron’s name at the top.

• Use the “Active Hold Shelf” and “Expired Hold Shelf” to monitor current holds and expired holds respectively.
REQUESTS: HOLD SHELF MANAGEMENT: EXPIRED HOLD SHELF

• Four Tabs:
  • **Reshelve** - items that belong to the circulation desk’s library. For example, books paged from within Van Pelt Library
  • **Send to Circulation Desk** – lists all items belonging to a different circulation desk in the same library. For example, if an item from Lippincott reference ended up on our hold shelf. Not likely.
  • **Send to Library** – items belonging to another library. For example, paged from Biomed and now need to be returned to Biomed
  • **Activate Next** – lists items that have a different fulfillment need outside of returning to it’s home library: i.e another person has a hold/request placed on the item or it has a work order on it and needs to be sent to a specific work order department.

• Use the limiting facets to narrow down what you are looking for in this menu as you would with a repository search.
• Selecting All and hitting the “reshelve,” “transit,” and “Activate” buttons at the top of each tab’s page will apply the action to all items selected an automatically print the appropriate slips.
RECALLS:

Our Policy: Recalls are placed for two reasons only:

- Needed for course reserves
- We are the only institution in the world that owns this item (this is not an exaggeration!)
- If neither of the two above reasons are applicable, the patron is to put in a Resource Sharing request for the desired items via BorrowDirect, E-Z Borrow, and/or InterLibrary Loan.

Recalls in ALMA are simply requests for an item. Except this request will truncate the due date of the patron currently, with the item out on loan.
- Placing one is done in the same exact manner as every other request. The only difference is the type of request you choose.
• Documentation for the many Fulfillment and Course Reserves functionalities will be available on an Internal LIBGuide following the completion of the training program.

• A “ALMA Fulfillment Support” Listserv, where staff and professionals from every library can post their questions about certain functionalities will also be available.

• Any member of the ALMA Fulfillment Implementation Team is happy to answer your questions post-training =)
THANK YOU