Basic Fulfillment Exercises

Objective: At the end of these exercises, the learner will be able to do common circulation tasks.

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Logging into Alma

Objective:
At the end of this exercise, the learner will be able to log into Alma.

Exercise:
Complete the following steps using the Alma documentation at https://www.library.illinois.edu/staff/alma/
under Fulfillment > Basic Fulfillment > Documentation > **Log into Alma**.

1. Go to https://go.library.illinois.edu/alma.
2. Enter your NetID and password and click "Sign in".
3. Authenticate with your two-factor authentication.
4. Check that your physical location is correct.
5. Enable quick printing.

Loaning Items

Objective:
At the end of this exercise, the learner will be able to loan out (charge) an item to a local patron in Alma.

Exercise:
Complete the following steps using the Alma documentation at https://www.library.illinois.edu/staff/alma/
under Fulfillment > Basic Fulfillment > Documentation > Loans > **Loan Items to Local Patrons**.

1. Open the "Fulfillment" menu and select "Manage Patron Services".
2. Enter (scan) the patron's barcode in the "Scan patron's ID or search for patron" field.
   a. You can either scan your own i-card or paste in the barcode 20112000204338 for dummy patron Fozzie Bear.
      i. If you're pasting in the dummy barcode, select the option with the patron's name when it appears below the field, and then click "Go".
3. The patron record will open to the Loans tab by default.
4. Enter (scan) the item barcode into the "Scan Item Barcode" field. Checked-out items will display in a list below the "Scan Item Barcode" field.
5. Optional: Click the "Switch to table view" or "Switch to record view" button to see what both views look like.
6. When you are finished, click the "Done" button above and to the right of the patron's name in the sidebar. The patron will receive a notification email of the items that were checked out to them.
7. If this was just for practice, check the item back in (see the Returning Items section below).

Proxy Patron Loans

Objective:
At the end of this exercise, the learner will be able to loan out (charge) an item via a proxy patron in Alma.

Exercise:
Complete the following steps using the Alma documentation at https://www.library.illinois.edu/staff/alma/
under Fulfillment > Basic Fulfillment > Documentation > Loans > **Loan Items to a Proxy Patron**.

1. Open the "Fulfillment" menu and select "Manage Patron Services".
2. Check the "Use proxy" checkbox.
3. Put your cursor back in the "Scan patron's ID or search for patron" field and enter the patron's barcode.
    a. For this exercise, use the barcode 20112000204486 for dummy patron Fitzwilliam Darcy.
    b. Normally we would scan the patron's card. In this case, copy and paste the barcode into the field, select Fitzwilliam Darcy's name, and then click "Go".
4. A drop-down menu labeled "Proxy for" will appear. Choose the appropriate person for whom they are proxying, and then click "Go".
    a. For this exercise, pick dummy patron Dana Scully.
5. Proceed as above for Loaning Items. Remember to click the "Done" button when you're finished. This will generate a letter to the person under whose name the item was loaned out (in this case, Dana Scully).
6. Since this is just for practice, check the item back in (see the Returning Items section below).

Returning Items

Objective:
At the end of this exercise, the learner will be able to return (discharge) an item.

Exercise:
Complete the following steps using the Alma documentation at https://www.library.illinois.edu/staff/alma/
under Fulfillment > Basic Fulfillment > Documentation > **Return Items**.

1. Open the "Fulfillment" menu and select "Return Items".
2. Enter (scan) the item barcode for each returned item in the "Scan item barcode" field.
    a. If the returned item is from another library, print the transit slip and put it in the item.
    b. If the returned item fulfills a hold or a Work Order, print the slip and put it in the item.
3. Optional: Click the "Switch to table view" or "Switch to record view" button to see what the list of returned items looks like in both views.
4. Follow your department's procedure for where to put items after they've been checked in.

Backdating Returns

Objective:
At the end of these exercises, the learner will be able to backdate returned items in Alma in two ways.

Exercise:
Complete the following steps using the Alma documentation at https://www.library.illinois.edu/staff/alma/
under Fulfillment > Basic Fulfillment > Documentation > Return Items > **Change Return Date**.

Note: For each exercise, you will need an item that is currently checked out and can have the return date backdated.

- For example, if you have an item from a book drop that could have been returned while the library was closed, you can backdate the return date to closing time on the last day the library was open.
- If you need to use items that were checked out to a dummy patron for practice, keep in mind that the return date must be sometime between when the item was checked out and the present moment. For instance, if you charged an item to a dummy patron an hour ago, you couldn't backdate the return to a previous day, but you could adjust the time of the return to be ten minutes ago.

Adjusting the Return Date for a Returned Item

1. Open the "Fulfillment" menu and select "Return Items".
2. Scan the item in the "Scan Item Barcode" field to return it.
3. Change the return date/time of the item:
    a. Click the "More Actions" button with three dots on the far right of the item in the list.
    b. Pick "Change Return Date" from the drop-down menu.
    c. Enter a new date and time.
    d. Click the "Change Return Date" button.
4. The return date and time for the item should be what you just changed it to.

Setting the Return Date Before Returning the Item

1. Go to the "Return Items" screen in Alma.
2. Click the calendar icon in the "Override return date and time" field.
3. Select an appropriate date and time for this item's return, and then click the checkmark button.
4. Move the cursor back to the "Scan Item Barcode" field and scan in the item's barcode to return it.
5. The return date and time for the item should be what you previously set it to.
   Note: Any additional items you return while you're on this screen will have the same return date and time that you just set, unless you clear the return date and time in the "Override date and time" field. This can be done by clicking the "X" in the field. Going to a different screen (such as the "Manage Patron Services" screen) before coming back to the "Return Items" screen will also clear it.