Circulation Basics - Fulfillment Overview Module

This is the first section of the Fulfillment module to the Alma Overviews course. The video is at the top of the page, followed by the script.

In this video, you’ll review:

- Viewing the Patron Record
- Loan an Item
- Renew an Item for a Patron
- Mark an Item Claimed Return, Lost, or Found
- Return an Item
- A quick note on notifications: Overdue notices, fine notices, etc.

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Welcome to the Fulfillment module of the Alma Overviews online course. In Alma, the term Fulfillment refers to any activity that fulfills a request, including circulation, pick lists, stacks maintenance, routing, resource sharing, course reserves, billing, and of course, patron services. This module will review viewing the patron record, loaning and renewing items, returning items, marking items claimed returned or lost, and the use of proxies. It will also review the pick list and hold shelf lists, and demonstrate placing a request. If you haven’t already watched the Searching module and the Fulfillment-related searching example videos, please do that before watching this module.

For most Fulfillment activities, location matters in Alma; make sure that you have the correct location set in your Currently at in the upper right corner. If you frequently switch between library locations or work at a shared PC with someone who does, check the box to Always Show Current Location so it’s easy to confirm you’re set to the right place for your work.

Viewing the Patron Record

Let’s begin by reviewing how to find and view a patron record. The easiest way to view a patron record is to select Manage Patron Services from the Fulfillment menu and scan in the patron’s barcode. This will bring up the record, with a snapshot of their current status at the top and tabs for Loans, Returns, and Requests down below.

A note: Staff with sufficient Alma clearance can also search for patrons by name in the persistent search bar, but most staff and student workers will need the patron’s ID number to search.

To view the patron’s loans:

1. The Loans tab is selected by default
2. The Loan Display option will always default to Loans of this session, meaning it will only show items that have been loaned to the patron while you’ve been recently interacting with them.
3. To see all of the patron’s loans, click on the box and select All Loans
4. A green check mark next to a loan means there is a note on the record
   1. Click the check mark to see the note.
   2. Return to the patron overview by clicking the < back button to the left of the words Loan Notes at the top
5. To change how the list of loans displays, click on the gear icon to the right of the Renew links

   1. Note: If you leave a patron record and return, you will be starting a new session, so the Loans of this session will now be blank, even if you had checked out items to them.

To view a patron’s recent returns, click on the Returns tab; again, Returns of this session versus All returns. Patron return lists are purged after a period of time, usually around six months.

To view a patron’s current requests, click on the Requests tab.

You can see that in all of these lists, you can act on loans and requests using the row action item list off to the right of the record.

In the upper section, if you click on their barcode next to ID, you will see additional User Details; any tab with a dog ear will have information on it.

A note about the Account Type:

- Alma refers to external users and internal users. Perhaps counter-intuitively:
  1. External users are those loaded into Alma by Harvard’s database, such as students, staff, and faculty (the data came from outside, external to Alma)
  2. Internal users are created within Alma, such as our training example here, or Interlibrary Loan institutions, or some special borrowers

- Note the Fines/Fees tab. You can get directly to this tab from the patron record by clicking the dollar value in the Active Balance link near their name. This would list fines and fees of all types, and if they had a number of fines and fees, you can filter your list to just see a certain type.
I’ll go back to my main student account. Again, you can get directly to these fines and fees by clicking the dollar amount near Active Balance. Crimson here has a zero dollar Active Balance.

**Loan an Item**

Now, let’s loan an item.

1. In the patron record, make sure you’re on the **Loans** tab.
2. Scan the item barcode in the “Scan Item Barcode” field and click OK if it doesn’t automatically go. If I scroll down, I can see the item is now loaned to the patron.
3. To loan additional items, continue scanning in barcodes.

You can also **add a note** to a Loan, if you need to explain that someone accidentally discharged and then re-charged out an item to a patron, or any other action that a patron might question. **Remember:** Any note you add will be visible to a patron on their account, so choose your words with that in mind.

1. Look for the item in the list that you want to add a note to. (I’ll go ahead and add a note to what I just checked out.)
2. Click on the row action item list for that item
3. **Select View Notes**
4. Click on **Add Note here on the right**
5. Type in the note, then click **Add** when you’re done

To delete a note, you go to the same list and click on the row action item icon to either edit or delete the note.

When you’re done, click on the left-facing arrow next to **Loan Notes** to get back to the patron record. We will now see one of those green checkmarks next to the item that we’re looking for.

If you’re finished with a transaction and want to close the patron record, you can click the **Done** button or, as you see from the hint, you can click on ALT+CTRL+D.

**Renew an Item for a Patron**

Patrons can renew their own items online in Primo, or staff can do this from here in Alma. To renew an item:

1. Go to the patron’s record.
2. From the drop-down **Loan Display** menu, choose **All Loans**
3. There are three renewal choices:
   1. **Renew all loans:** Quickly renew everything on a patron’s record by clicking **Renew All** above the loaned items list.
   2. **Renew individual items:** Renew a single item by clicking on the row action items button and selecting **Renew**. You can see that it now has a new due date of February 10th.
   3. **Renew by changing date:** Renew or change date for specific loans by selecting their boxes on left side of list, then clicking on **Renew Selected or Change Due Date** at the top. If I choose **Change Due Date**, I can now choose my new due date from the calendar and change due date.
   4. If an item fails to renew - for example, if the item has been requested - you will see an alert at the top of the screen and the due date will not change.

For instance, we see that this item has been recalled, so if I try to renew it, the due date is already set to the renewed due date and the **Item Status** is set to “Recalled” and can’t be removed.

Alma confirms how many items were or were not renewed successfully in a message with a blue background at the top. A “fail” error alert with a red background may also appear.

**Mark an Item Claimed Return, Lost, or Found**

There are three additional statuses you can set for an item other than **Loan** on a patron record:

- Selecting Claimed Return leaves the book charged to the patron’s account, though not accruing fines after the date it’s marked Claimed Return.
- Selecting Lost generates a fee for the book.
- Selecting Found reverses either of these.

To change these statuses:

1. Be in the patron record
2. From the Loan Display, choose **All loans**
3. From the list, locate the item(s) the patron is claiming were returned or lost
4. For each item, select Claimed Return or Lost. You can add a note if you need to.
   1. Once an item is set to Claimed Return, you will see both Lost and Found as choices in the row action item list.
   2. Found will return the item and eliminate any fines or fees attached.
   3. Once an item is set to Lost, you will only see Found Item as an option.
Return an Item

Now, let’s move on to returning items.

To return items:

1. From the main menu, select **Fulfillment > Return Items**
2. Scan in the barcodes into the **Returns** field
3. I’ll return three different items, to show common variations on what can happen next:
   1. First, an item that belongs to Lamont Library. This is actually our item that was Claimed Returned in the previous example and is now checked in. You can see that the next step says **Reshelve** at the General Collection at Lamont.
   2. Next, we have a Harvard Depository item for another library. Remote storage items (Harvard Depository, ReCAP, etc.) no longer have to be returned to owning library – they can be sent directly to remote storage. You can see a pop up comes up to say Return to Offsite Storage, owned by Widener Library, even though we’re set to Lamont.
   3. This item has a note, so we read the pop-up and follow instructions.
   4. This next item has been requested by someone.
      1. When an item that has a hold request for a patron is scanned in Return Items at the library that the patron selected for pickup, an email notification is sent telling the patron the item is on hold for them. Follow local workflow protocols for handling hold shelf material.
   5. Finally, this item has a work order placed on it. If an item’s record needs work, such as cataloging work, or if the item itself needs repair, staff will initiate a work order for that item. Returning it will generate a pop up message on where to send that item. In this case, the item’s destination is Collections Care at Widener, so staff at Lamont would place it in transit to that department.

A quick note on notifications: Overdue notices, fine notices, etc.

Patrons will receive notifications about hold requests, overdue items, lost bills, and others automatically from the system as they’re processed. For some activities, such as cancelling a request, staff have the option not to notify the user if it’s not necessary. All you have to do is unclick the **Notify user** box.

In this video, we’ve reviewed basic circulation functions: viewing a patron record, loaning and renewing items, marking materials claimed returned or lost, and returning items. In the rest of this module, we’ll review other Fulfillment functions such as requests and pick and hold lists.