Alma Fulfillment - Major Differences from Aleph

- Proxy Patrons
- Item Process Type: Acquisition, Status: Item not in place
- Scan and Deliver
- Borrow Direct Link Display (for direct linking out to place BD requests)
- Temporary Move Requests
- Cash Transactions from Aleph
- Carrels
- Reading Room
- Creating and Updating Reading Room/Library Guest Records
- Putting an Item on Course Reserve
- Creating a Patron Record on the Fly
- Processing Alma Daily Reports
  - Expired Hold Requests Report
  - Create Fines And Fees Report (was “Payments Received Report” in Aleph)
  - Expired Hold Shelf (was “Hold Shelf Report” in Aleph)
  - Lost Materials
- Secure Exit

Proxy Patrons

Proxies can make online requests only for themselves, which then can only be loaned to their sponsor. The item will be placed on hold for the proxy and not the sponsor. In order to cancel the hold request the item must be loaned to the proxy first which may require an override.

There is an entry in Ideas Exchange proposing that the proxy for function be optionally invoked when a request is placed: https://ideas.exlibrisgroup.com/forums/308173-alma/suggestions/11376135-have-the-proxy-for-setting-available-for-placing-r. In theory, this proposal would allow proxy patrons and staff to indicate when a request is being placed for a proxy patron or for the proxy’s sponsor. This would make the rest of the proxy-for-sponsor checkout transaction much smoother.

Item Process Type: Acquisition, Status: Item not in place

Items that had the following characteristics migrated to Alma with the status “Item not in place” and a process type of “Acquisition”.

<table>
<thead>
<tr>
<th>Aleph IPS</th>
<th>Aleph order status</th>
<th>Alma Item Process type</th>
<th>Alma Item status</th>
<th>Primo display</th>
<th>Primo Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td>OI: Order initiated</td>
<td>NEW</td>
<td>Acquisition</td>
<td>Item not in place</td>
<td>On order</td>
<td>Can request</td>
</tr>
<tr>
<td>OR: On order</td>
<td>NEW, SV, RSV, DNB</td>
<td>Acquisition</td>
<td>Item not in place</td>
<td>On order</td>
<td>Can request</td>
</tr>
<tr>
<td>RE: Ordered-Received</td>
<td>NEW</td>
<td>Acquisition</td>
<td>Item not in place</td>
<td>On order</td>
<td>Can request</td>
</tr>
<tr>
<td>NA: Not arrived</td>
<td>all</td>
<td>Some Acquisition, others Technical</td>
<td>Item not in place</td>
<td>Technical or On order</td>
<td></td>
</tr>
<tr>
<td>CA: Cancelled + Item status NOT 88</td>
<td>SV</td>
<td>Acquisition</td>
<td>Item not in place</td>
<td>On order</td>
<td>Can request</td>
</tr>
</tbody>
</table>

Items have a Process type of Acquisition because they had not been arrived in Aleph prior to migration. The items display as On order in HOLLIS and are requestable. Resolving these items will involve identifying sets that are likely on shelf and changing the status to received in Alma. An API is under development to do this work in batch. See Orders for received material that was not arrived in Aleph for detailed remediation plan and status.

- Ongoing analyses using Analytics of records where the item is "not in place" has begun. There is some low hanging fruit in items that are actually in place at HD based on their separate inventory system. This has resulted in a list of 6176 items which can have the Process Type removed and be marked In Place.
- The APIs for doing this work in batch need to be developed.

**ALL 02 items are now requestable for in-library use only. This is a change from Aleph, when only 02 remote storage items were requestable.**

Scan and Deliver
System behavior change in when links display. Conditions are: Must be logged in; item must be a book or journal; item must be available in Primo; item must not be on a title that is Aeon-eligible. We do not have the ability to display Scan Del links in Alma with the same granularity that we had in Aleph. Therefore, sometimes Scan Del links will not appear for items in Alma that did appear for the same items in Aleph. Staff and users should use the Scan and Deliver option on the ILLiad request form to request these items.

Form Issues. ILLiad form changes resulted in issues with request form for patrons.

Item availability: While you may see Scan&Deliver links present for many items, availability for the service is determined by our RAPIDILL mapping table. Resource Sharing automatically re-routes the majority of Scan&Deliver requests to the RAPIDILL service for fulfillment, which pushes the request to the owning library. The RAPID mapping table only allows requests for libraries that participate in the Scan&Deliver service and for items that are regular loans (01) or standard non-circ (02). We can be granular in our collections, so if you are receiving requests through the RAPIDILL service for collections that should not be available, please contact Jason Frederick Cassani Clarke to update the mapping table.

Borrow Direct Link Display (for direct linking out to place BD requests)

Status: Change in system behavior

Expected Resolution Date: Resolution not expected

- Please note that there has been a change in how BD links appear in HOLLIS. They appear broadly on all records where the Primo availability is "unavailable"; this means that the links may briefly show/not show incorrectly when an item is recently checked-out or checked back in until the next Primo availability refresh. This means that the links may show on HOLLIS records that are not eligible for Borrow Direct. This should not be taken to mean that these items are now Borrow Direct-able. Only 01 items from certain libraries are eligible for lending via BD. If users don’t see what they are expecting, they can always access the Borrow Direct service directly from http://nrs.harvard.edu/urn-3:hul.eother:BD.

Temporary Move Requests

Status: Change in system behavior

Expected Resolution Date: Resolution not expected

- While we are able to prevent patron physical item requests on materials that circulate to owning library only, there isn’t a way in Alma to prevent temporary move (i.e., Reserves) requests on such items. We will need to rely on HD catching and reporting back on these requests.

Cash Transactions from Aleph

Status: Change in system behavior

Expected Resolution Date: Resolution not expected

- Fines that were created in Aleph were transferred to AP and closed in Alma. Credits will need to be issued in the AR or Termbill Systems. Note that items that were declared lost and billed in Aleph will not automatically generate a credit in Alma. Contact HLL Privileges in these cases.

Carrels

- Pseudopatrons: In Aleph each carrel was represented by a pseudopatron. In Alma, each Widener carrel is represented by an item record. As part of carrel assignment, an assigned carrel will be loaned to the carrel holder for the duration of the assignment.
- Carrel Loan Periods: In Aleph, all carrel loans to carrel pseudo-patrons had due date of 12/31/2099. In Alma all loans have due dates that correspond to the carrel holders’ regular loan period.
- Carrel Policy Change: Before, only Widener items were eligible for carrel loan. Now items from other libraries including Borrow Direct and ILL are eligible.
- In-library-use Items (Work in progress): At present in-library-use items (02) are not loanable at Carrel Desks without override.
- Proxy Carrel Assignments: All eligible proxy carrel assignments are now made to their sponsors.

Reading Room
The **Reading Room** functionality in Alma allows non-circulating material to be loaned to the patron, while not leaving the library. It's intended for ILL in-library-use only pickup and for library guests and visiting researchers.

Requested items will be kept on hold for 7 days after notification. Patron gets 28 days to keep item in reading room from date item was picked up (loaned).

Terms of Use (TOU) policies can define that items of a certain type (by location, material type, item policy etc.) are *only* available for loan in a Reading Room.

When a patron requests such an item:

1. The item is moved to the Reading Room, and will be made available to the patron in the Reading Room for a library-defined period.
2. The patron comes to the Reading Room and is able to loan out and return the item to the Reading Room until it is no longer required. Even though the item is loaned to the patron, it may not leave the Reading Room.
   - In effect, the item temporarily changes location to the Reading Room until the due date of the loan has passed, or until the patron indicates that he/she no longer requires the item.
3. Returns in the Reading Room differs from regular returns, because the staff operator can indicate the check-in mode:
   - **Final** – The patron no longer requires the resource, and the resource can be returned to its permanent location.
   - **Not final** – The patron still requires the resource. The resource should therefore be stored on the Reading Room’s hold shelf for 28 days total.

### Creating and Updating Reading Room/Library Guest Records

Scan or type the barcode on the card.

If the barcode is **not** found, type in the name and see if there is a record for the patron as a library guest.

If there **is** a record for a patron as a *library guest*, but the barcode did not scan, you will need to only add the barcode to the record:

1. Go to **Fulfillment >> Manage Patron Services**
2. Look up the patron by name
3. Click on the **ID label** under the patron’s name to view **User Details** page
4. Go to the **Identifiers** tab and click **Add Identifier** on the right side of the screen
5. Select **Additional** from the **Identifier Type** drop-down
6. In the **Value** field, enter the patron’s 8-digit number from the back of the patron’s ID
7. Click **Add then Close** to complete

If the patron **does not** come up as a *library guest* in Alma when searched by name and the barcode on the ID **did not** scan, create a new record:

1. Go to **Fulfillment >> Manage Patron Services**
2. Click **Register New User >> Quick User Management**
   - **User Information**: Enter first name and last name
   - **User Group**: Select *Library Guest* from drop-down menu.
   - **User Management Information**: Select *No* for institutional record and leave password field blank
   - **Email Addresses**: Select email type and enter email address
   - **Addresses**: Select address type home and enter address
   - **Click Update User**
3. Click the link following the ID label to view the **User Details** page
   - **Identifiers** tab and click **Add Identifier** on the right side of the screen
   - Select **Additional** from the **Identifier Type** drop-down
   - In the **Value** field, enter the patron’s 8-digit number from the back of the patron’s ID
   - **Click Add then Close** to complete

### Putting an Item on Course Reserve

**Course Reserves 1 script**

- **Course Reserves**:
  - [https://wiki.harvard.edu/confluence/x/szOVDQ](https://wiki.harvard.edu/confluence/x/szOVDQ)
Creating a Patron Record on the Fly

- From the main menu bar click FULFILLMENT > Manage Patron Services
- Click Register New User > Quick User Management
  - USER INFORMATION: Enter First name and Last name
  - USER GROUP: Select “Library Guest” from dropdown menu.
  - USER MANAGEMENT INFORMATION: Select No for institutional record and leave password field blank
  - EMAIL ADDRESSES: Select email type and enter email address
  - ADDRESSES: Select address type home and enter address
- Click Update User at the top right of the screen
- Click the link following the ID label to view the “User Details” page
  - Go to the Identifiers tab and click Add Identifier located on the right hand side of the screen.
  - Select Additional from the drop-down and enter the patron’s 8 digit number from the back of the patron’s ID.
  - Click Add and Close to complete

Processing Alma Daily Reports

**Note:** In Alma, this information is not all in one place. Please see specific sections for how to proceed for each type of report.

Expired Hold Requests Report

These no longer need any staff intervention. If a patron’s request is unfilled, a note will be sent to the patron automatically.

Create Fines And Fees Report (was “Payments Received Report” in Aleph)

**Definition:** List of any payments received or waived.
**Action:** Give to Fines and Fees Specialist

This is a manual report that is generated as needed. You can only run a report for up to 1 week at a time.

1. Go to Fulfillment Menu >> Advanced Tools >> Create Fines and Fees Report
2. Choose parameters for the report. This should include payments and waives, and all library and transaction types should include Baker.
3. Select a User to receive the report via email.
4. Click Run Now

For other Fines and Fees reports, go to the Analytics menu and choose the report “FUL-Fines Fees Previous Day (Waived by staff)” or other reports as needed.

Expired Hold Shelf (was “Hold Shelf Report” in Aleph)

**Definition:** Items on the hold shelf haven’t been picked up by the person who originally requested them.

Alma sorts items on the Expired Hold Shelf into four tabs:

- **Reshelve:** Displays all expired requests for items belonging to the current circulation desk and for which there is no other request in the queue.
  - Toreshelve an item, click the Reshelve button to the right
  - To reshelve multiple items, select the check boxes of the relevant items and click Reshelve above

- **Send to Circulation Desk:** Lists all requests for items belonging to a different circulation desk in the same library, or that are requested for pickup at another desk within the same library.
  - To send an item to another circulation desk, click the Transit button to the right
  - To send multiple items, select the check boxes of the relevant items and click Transit above
  - The Ful Transit Slip letter (letter code: FulTransitSlipLetter) is printed and the item is put In Transit

- **Send to Library:** Lists all requests for items belonging to a different library, or that are requested for pickup at another library.
  - Same instructions as “Send to Circulation Desk” above

- **Activate Next:** Activates the next request in the queue, which cancels the first request and makes the item available to the next requester
This contains items that are currently on the hold shelf but have expired
Best Practice: for the sake of accuracy, only check in books on this screen that are in hand
Use Return Items to check in books. This will route them and remove them from the expired hold shelf
Physically route all items based on their destination

Lost Materials
Definition: Items checked out by patrons that may be lost. In Alma, a Harvard-wide job runs to convert long-overdue items to Lost status.
Action: Follow local procedures for dealing with lost materials.

Secure Exit
For libraries that use Secure Exit, the URL has changed for Alma: https://secureexit.lib.harvard.edu/secureexit/