FULFILLMENT: CIRCULATION WORKFLOW

Shared Library Services Platform Project
Logan Rath

SUNY Libraries Consortium

Today's Agenda

- Basic process
- Checking out items
- Returning
- Renewing
- Proxy Borrowing
- Offline Circulation
- Blocks
- Fees

The basic process

It's largely the same because Alma is just a computer system that facilitates what we've always done:

1. Scan ID
2. Check out item
3. Patron uses item
4. Item comes back
5. Goes to shelf

Checking out an Item

Loan Display : 🔍 Look-up or select ▼

All loans

Loans of this session
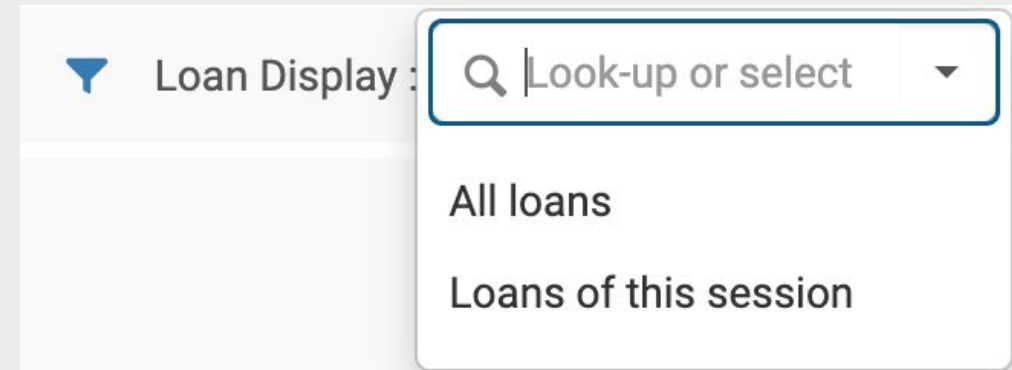
1. Start with
   Fulfillment > Manage Patron Services
2. Scan the patron's ID (or search for the user)
3. Scan in the barcode
4. Repeat #3 until all scans are done
   - *Note the Loan Display filter pre-set to* "Loans of this session"
5. Click "Done"

Returning an Item

- Fulfillment → Return Items

- Adjust date/time if necessary (to backdate)

- Scan the barcodes
  - *Watch for pop ups that tell you next steps*
  - *DO NOT USE Scan In Items - that's for something else!*

Renewing an item

- Manage Patron Services → Bring up record
- Defaults to Loans tab
- Change filter to All Loans
- Check box for specific loan and then Renew Selected

Loans tab, Filtered to All loans

Proxy Borrowing

1. Add the sponsor to the Proxy For tab of the proxy's user record.
2. To lend to the proxy for the sponsor:
   a. *Manage Patron Services*
   b. *Scan ID*
   c. *Check 'proxy for" box*
   d. *Select proxy*

The barcode will be checked out to Peter by Logan

Offline circulation

- Use the [Offline Circulation Utility](#) (windows only)

- Fulfillment → Offline circulation

- Upload the file

Holds

- Mostly done in Primo VE
- Can be done on the patron's behalf
  - *Request gets placed*
- General Procedure
  - *Pick from Shelf*
  - *Scan In items (the thing I said not to do before)*
  - *Do next action (Ship physically or Move to Hold Shelf)*

Blocks

- Blocks tab on User Record
- When blocks are configured they can be set to override by different levels (Operator, or Manager)

- If the student doesn't have the right privileges, a manager will have to log in to a Alma with their username and password.

How do I add a block?

- Full Patron Record, Blocks Tab
- \+ Add Block
- Fill out the form
  - *Expiry date of when the block will expire*
- Click Save

Code Table

Cancel   Save

You are configuring: Ex Libris University   Change Organization Unit

User Block Description

Table code	UserBlockDescription	Table Description	User Block Description
Patron Facing	Yes		
Customization mode:	Entire table needs to be customized		

Import   Restore Default Translations   ⊕ Add Row ▾   ⟼

▼ Filter : **English** ▾

	Enabled	Move Up	Move Down	Code	Description	Translation	Default Value	Updated By	Last Updated	
1	◉		▾	SUSPENDED	User is suspended	User is suspended	●	exl_impl	2015/01/07	⋯
2	◉	▴	▾	CONSORTIA	Consortial block	Consortial block	○	system	2017/07/30	⋯
3	◉	▴	▾	01	Patron consistently	Patron consistently returns books late	○	exl_impl	2015/01/07	⋯
4	◉	▴	▾	02	Disruptive behavio	Disruptive behaviour in library	○	exl_impl	2015/01/07	⋯
5	◉	▴	▾	03	Personal item left i	Personal item left in library - contact Circ desk	○	exl_impl	2015/01/07	⋯
6	◉	▴		04	Too many Claimed	Too many Claimed Returned Items	○	exl_impl	2015/01/07	⋯

How do I remove a Block?

- Full Patron Record, Blocks Tab
- Use the row actions (...) button → Delete
- Click Save

Fees

- Automatic fees (community user registration, overdue items, etc.) all calculated by FUR and TOUs
- Manual fees can also be added
    - *Manage Patron Services -> Search -> Update User Information -> Full Information*

Adding Manual Fees

- Go to the full patron record, Fees tab
- Click + Add Fine or Fee
- Choose the Fine type and amount, connect to a barcode if the item should be unavailable as a result of the fee

Paying Fees

Waiving Fees

		Creation Date	Fine/Fee type	Status	Status Date	Comment	Fee Owner	Title	Item Barcode	Original Amount	Remaining Balance	
1	☐	09/20...	Other	Active	09/20...	-	Main Library	-	-	35.00 USD	35.00 USD	...
2	☐	09/20...	Credit	Active	09/20...	-	Main Library	A picture book of ancient British art, / by Stuart Piggott and Glyn E. Daniel.	450-10			

Waive

Dispute

Link to item

View hidden

Disputing Fees

- Disputing allows the patron to resume privileges while the dispute is under investigation.
  - *Circulation Desk Manager is needed*
- Analytics reports can show who has disputed fees.
  - *Perhaps you will want a local procedure for dealing with these.*

QUESTIONS?