Alma Essentials: Fulfillment

PATRON SERVICES OVERVIEW

Hello, in this series you will learn about the processes for Fulfillment. In this tutorial you will learn how to access and edit user records, as well as how to send activity reports.

There are two Account Types in Alma: Internal and External.

Internal user accounts are records that only exist in Alma. They are created manually by library staff and fully managed by the library.

External user accounts are managed outside of Alma, such as your Student Information System. Records are imported and regularly synchronized with Alma.

User accounts are then assigned a Record Type: Staff, Public, or Contact user.

Staff is for internal records created by the library.

Public is for external records created by the user record synchronization. Record Types govern user access in Alma. It is not unusual for user records for library staff to have a Public record type.

And contacts are user records associated with the information on the Contact People tab in vendor or vendor account records in Alma.

You have a patron who would like to update their address and get a list of the items they currently have on hold.

You'll go to Fulfillment > Manage Patron Services. Once the page loads, enter your patron's barcode… and here's Thomas' account. The page defaults to the loans tab to check items out to your user. To view and edit a Thomas' information, you'll click "Edit User Info". This opens the "Quick User Management" page.

You can see basic information about Thomas here, and you need to update Thomas' address so you'll scroll down and edit the information accordingly. If you needed to see Thomas' full user record you could click "Full information"… here. Please watch the User Management tutorials for more detailed information about user accounts.

Keep in mind that if Thomas' account type were external, he would need to update his contact information with the campus registrar. The next time the student information system syncs it will update his information in Alma.

Once you're done you'll click "Update User", and you'll be taken back to the Patron Services page to continue your transaction.

To view Thomas' requests, click on the "Requests" tab.

And to send Thomas a list of his requests you'll click "Send Requests Report", here. Thomas should now receive the Requests Report Letter via email with his current requests.