

Alma Essentials: Fulfillment

PATRON LOANS

Hello, in the last session you learned about editing user details and sending activity reports. In this tutorial you will learn how to loan items to patrons including users without a library card or a patron record; as well as loan items to a proxy.

To check out items to a patron you need to be logged into Alma and make sure that your current location is set to the correct circulation desk. You're currently working at the Main Library.

You have a patron who has a few items she would like to check out. So you'll go to "Fulfillment" and choose "Manage Patron Services". Now you can either scan or type in her barcode in the ID field. But your patron forgot her library card, so you'll type in her name from the ID she has provided.

Keep in mind that if your user has a common name you may not see them auto-populate right away. Alma will only display a few names in the list and will filter them as you continue entering the patron's full name.

Here she is. Now you'll click "Go" to open the Patron Services page for Sarah's account.

You'll scan in her items. Once you're finished, you'll click "Done" if you want to trigger a Loan Receipt letter, if it has been configured in your system, or you can just leave the screen and it will time out and close the page on its own without sending the letter. Let's go ahead and click "Done", and Sarah is now good to go.

Another patron has come up to the desk with an item they would like to check out, but they said that they are new to the institution and aren't registered at the library yet.

You'll click "Register New User" on the Patron Services page. Now you can enter in their information. Let's just fill out the required fields for now.

In the "User Management Information" section, make sure you select whether or not the patron has an institutional record, such as in a Student Information System, and fill in the information as needed. This will make a temporary account in Alma allowing them to check out items, and will merge with the master copy of their record the next time Alma syncs with your institution's system.

If they are a community user, you can select "No", let's do that now, and enter a password.

When you're done entering all the user information, you'll click "Update User".

Now you can check out their items as usual, and click "Done" when you're finished.

You now have a teaching assistant, Tom Smith, who would like to check out a few items on behalf of a faculty member, Howard Hughes.

Let's scan in Tom's barcode, check the box for "Use Proxy", and then click "Go". Another drop-down menu will appear allowing you to select the faculty member.

Now you can see the faculty member's record. Alma shows you that your patron is serving as a proxy for this transaction.

Scan the item barcode as usual to proceed with the loan. The items are now checked out to the faculty member, Howard Hughes, not your patron, Tom, who is only serving as a proxy.