Alma Essentials: Fulfillment

Loan Material Records

Hello, in the previous session you learned how to loan an item to a patron. In this tutorial you will learn how to view item information and loan items without a barcode or an item record.

If you need additional information about an item, you can use the persistent search bar. Make sure “Physical Items” is selected in the drop down menu, and you can further refine your search if you know specific information about the item from the search index menu.

Type in your title and click the magnifying glass or press enter on your keyboard to search the repository.

In each record of the search results you can click the “Holdings” button to view all holding records attached to the bibliographic record. And if you open the row action tool, there are additional options including:

- Items – to view a list of copies of the item attached to the same bibliographic record. Each of these can be accessed for additional inventory information.

If you have the “Physical Inventory Operator” role, you will also have the ability to select:

- Work Order - to create a work order for the item
- And Request - to submit a hold or move request for the item

You will also have an additional button to “Edit Item”, here, which will allow you to open the item record and make changes.

If you need to mark an item as missing, click “Items”… and then open the row action tool, and select “Toggle Missing Status”.

Let's go back to the list of titles.

On each record listing you can click “Other details” to see fulfillment information about the item, such as last loan date and any current requests.

A patron has come up to the desk, and would like to check out an item, but the barcode is missing. To check the item out, you’ll first need to go to “Fulfillment” > “Manage Patron Services”, and enter the patron’s barcode, and then click “Go”.

Now click the list icon in the “Scan item barcode” field, and then execute a physical item search.

Fill in the information for the item, and click the magnifying glass to search the repository.

Each record listed has several pieces of useful information: the library and location, the current status, if the item is not in place, and its process type.

You can also see if the item is currently on order, on loan, or requested. Simply click on the record row of the correct item to select it.

Now the “Scan item barcode” field is populated with the correct barcode. Click “OK” to check the item out as normal.

Now you have a patron who has an item they would like to check out, but when you scan in the barcode, you get an error message that says “Item not found”. To create an item record you’ll need the “Physical Inventory Operator” role, enter the barcode again, and then click “Create Item” instead of “OK”.

In the popup select “Existing” to create a new item record for an existing bibliographic record, or “New” to create a new set of bibliographic, holding and item records. Let’s select “Existing” for now, and then click “Choose”.

Now you’ll enter the title of the item in the “Title” field, or you can click the List icon to search all titles in your repository. Once you have selected the title, choose the correct library and location from the Location drop down menu.

The barcode field, which has been prepopulated with the number you entered; you may add a description, Material Type, and Item Policy, but these fields are not required.

When you’re done, click “Save”.

If you scan in an item that doesn’t have a bibliographic record, and choose “New” in the “Choose Holding Type” popup after clicking “Create Item”, you will be prompted to select a citation type; either Book or Article. Click “Choose” and a simple cataloging template opens.

The only required fields in the form, are the Title, the Barcode will be prepopulated with the number you originally entered, and library and location. Fill out any additional fields as needed, based on the established policy at your library. You can also select the “Suppress from Discovery” checkbox if you do not want the record to be published to Primo or Summon. Click “Save” when you’re done.

Now the new item record has been created, and the item is checked out to the patron. Behind the scenes, a work order has been created to send the item to technical services when it is checked back in.