**Fulfillment**

**Training Materials**

* [**Physical Requests**](https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English/E_Physical_Requests)
* **[Administration Fundamentals](https://knowledge.exlibrisgroup.com/Alma/Training/AlmaEssentials/Alma_Essentials_-_English/O_Administration_Fundamentals" \t "_blank)**

**Hands-on Exercises**  
**Part 1: Day-to-day operations**  
Using your sandbox, **sign in as** **AlmaUser01.**Ensure that you are in the Main **Library - Main Library Circulation** location. You can do this by clicking on the location icon in the upper right-hand corner and selecting this location (if it is not already selected). For these exercises, you may choose to either use the initial prompt to complete the activity on your own, or if you prefer, follow the step-by-step instructions.

Note: Location setting makes all the difference. The ability to manage patron services or return items is dependent upon being at a circulation desk.

**Exercise 1: Check-out an item to a patron**

* **Fulfillment > Checkout/Checkin > Manage Patron Services**
* **Search patron's ID or search for patron**:
  + Use the **Select from a list** option or type in a user name
  + Click **Go** or type Enter
* On the **Patron Services** screen **Loans** tab: **Scan item barcode** field
  + Scan or enter an item barcode
  + **Select from a list** icon to do a repository search
* Click **OK** or press the Enter key if not using a scanner configured with an automatic carriage return

Some items to note:

* + Default **Loan Display: Loans of this session/ All loans** is set at the institution level
  + User Notes: includes system generated notes and notes in the user record
  + **Due date** is determined by fulfilment rules
* Right click anywhere on the row or click the row actions icon (ellipsis) of the loaned resource
* Select **View policies** to see all the information applied to this loan (due date, grace period, renewable, fine and fee)
* Clicking **Done** sends the loan receipt to the patron (if configured) and closes the Patron Services screen

**Exercise 2: Renew an item**

* **Fulfillment > Checkout/Checkin > Manage Patron Services > Search patron's ID or search for patron > Patron Services**screen**Loans** tab
* To renew the item(s) click the checkbox(es) and click **Renew Selected**or click **Renew All** without making any selections
* To renew a specific item click on the row action menu and choose **Renew**

Loan status is now Renewed.

* You have the option to **Change Due Date** of loaned items, but you can't choose a due date that is

1. in the past
2. passed the user's expiration date
3. a date the library is closed (depending on configuration)

**Exercise 3: Return an item**

Items can be retuned in two places

1. **Fulfillment > Checkout/Checkin > Manage Patron Services > Search patron's ID or search for patron > Patron Services**screen**Returns** tab

* **Scan/enter item barcode**

The default **Returns of this session/All returns** is set at the institution level

* Click "**Done**" to send return receipts (if configured)

1. **Fulfillment > Checkout/Checkin > Return items >** Scan Item barcode. Depending on your role, you may be able to **Override return date and time** if the situation calls for it

**Exercise 4: Request an item**

There are three ways requests can be submitted

1. **Submit a request from the title:**

* Search for a **physical title**in the persistent search box**,**then click the**Request**button to the right of the item.

If the request option is not displaying, click the row action menu (ellipsis) to see all actions available.

* **Request Type**: choose **Patron physical item request**
* **Requester**: enter a patron’s name or identifier
* **Pickup At**: choose an available location
* Click **Submit**

If the requested item is on the shelf it shows up on **Pick from Shelf** list immediately.

1. **Submit a request from a patron’s record:**
   * **Fulfillment > Checkout/Checkin > Manage Patron Services > Search patron's ID or search for patron > Patron Services**screen
   * **Click Submit Request**button
   * On the **Submit Request** box click the **Select from a list icon** to search of and select a title
   * Choose **Patron Physical**
   * **Choose Pickup At:** choose an available location
   * Click**Submit**
2. **End users can submit request through Discovery**

**Exercise 5: Cancel a request:**

There are five ways a request can be cancelled:

1. In the persistent search box choose **Requests**
   * Search for the request using any of the available indexes
   * Click **Cancel** in the row action menu
2. Cancel a request from the user’s account:
   * **Fulfillment > Checkout/Checkin > Manage Patron Services > Search patron's ID or search for patron > Patron Services**screen**Requests** tab
   * Click **Cancel** from the row action menu (ellipsis)
3. Cancel a request from the Pick from shelf list:
   * **Fulfillment > Resource Requests > Pick from shelf**
   * Click **Cancel Request** next to the selected request
4. Cancel a request from Monitor Requests & Items Processes
   * **Fulfillment > Resource Requests > Monitor Requests & Items Processes**
   * Click **Cancel** in the row action menu

Some requests may not have the option to cancel, depending on the Workflow step the request is in.

1. **End users can cancel requests through Discovery**

**Exercise 6: Add a fine/fee to user record then pay a portion of that charge**

* **Add a fine:** there are two ways to add fines or fees
  1. **Fulfillment > Checkout/Checkin > Manage Patron Services > Search patron's ID or search for patron > Patron Services**screen
     + Click the link in the **ID** field to go to the user record
     + On the **Fines/Fees** tab click **Add Fine or Fee**
     + Enter Fee Type and Fee Amount and click **Add and Close**
  2. **Admin > User Management > Manage Users** or use the persistent search bar
     + Search for user
     + On the **Fines/Fees** tab click **Add Fine or Fee**
     + Enter Fee Type and Fee Amount and click **Add and Close**
* **Pay a fine**: the only place to pay is through Manage Patron Services
  + **Fulfillment > Checkout/Checkin > Manage Patron Services > Search patron's ID or search for patron > Patron Services**screen
  + Click the **Pay** button
  + Choose to pay **All fines** or **Specific fines**
  + Enter **Payment amount** and click **Send**

**Exercise 7: Waive a fine**

There are two ways to waive fines or fees

1. **Fulfillment > Manage Patron Services > Search patron's ID or search for patron > Patron Services**screen
   * Click the link in the ID field or the fine amount to go to the user record
   * On the **Fines/Fees** tab click **Waive All** or select fines and fee click **Wave Selected**
   * Click the row action menu (ellipsis) and choose **Waive** to waive a specific fine or fee
2. **Admin > Manage Users** or use the persistent search bar
   * Search for user
   * On the **Fines/Fees** tab click **Waive All** or select fines and fee click **Wave Selected**
   * Click the row action menu (ellipsis) and choose **Waive** to waive a specific fine or fee

Waiving Reason: values can be customized in **Configuration > User Management > Patron Charges - Reasons for Waiving Fine/Fee**

**Part 2: Fulfillment Configuration**

* Using your sandbox, sign in as **AlmaAdmin**

**Step 1 - Add a new due date option**

* + **Configuration > Fulfillment > Physical Fulfillment > Advanced Policy Configuration**
  + Click **Add Fulfillment Policy**
  + Choose **Policy Type:** **Due Date** and click **Next**
  + **Enter Policy Name**, choose **Value Type: Non-Fixed**, **Value: 10**, **Unit Of Measurement: Days** and click **Save**

The due date policy’s description is what is shown in the Primo Get It tab’s item list. If no description is defined, the Get It tab displays the due date policy’s value and unit of measurement.

**Step 2 - Add a new Terms of Use (TOU) that uses the due date option created in Step 1**

* + Go to **Configuration > Fulfillment > Physical Fulfillment > Terms of Use & Policies**
  + Click **Add a Terms of Use**
  + Choose **Terms of Use type: Loan** Click **Next**
  + Enter a **Name** and confirm the following policies

**Is Loanable** = Loanable (Loanable)

**Due Date** = Policy name you entered in Step one

**Lost Item Fine** = No Lost Item Fine

* + Feel free to change any other policies and click **Save**
* **Step 3 - Add a new rule to an existing Fulfillment Unit which uses the TOU created in Step 2**
  + Go to **Configuration > Fulfillment > Physical Fulfillment > Fulfillment Units >** Click on the **General** Fulfillment Unit **> Fulfillment Unit Rules** tab
  + Click **Add Rule**
  + Enter a **Name** and click **Add Parameter**

**Name** = User Group

**Operator** = In List

**Value** = Click Faculty and Staff and click **Add Parameter**

* + In the section titled Output parameter, Choose the TOU you created in the last step in the **Terms of Use** field and click **Save**
  + Move this rule to the top of the list by utilizing the arrows in the Move Up column