Managing Patron Services

To manage patron services, you must have one of the following roles:

- Circulation Desk Manager (logged in to a circulation desk)
- Circulation Desk Operator (logged in to a circulation desk)
- Circulation Desk Operator - Limited (logged in to a circulation desk)

As part of the fulfillment process, the Circulation Desk Operator/Manager selects a patron (see Selecting a Patron) and manages the patron's services. These activities include:

- **Viewing requests** – The Circulation Desk Operator/Manager can view a list of items requested by the patron (see Viewing a Patron's Requested Items).
- **Loans** – The patron arrives at the circulation desk to receive the requested material which is currently on the active hold shelf.

Alternatively, the patron may bring the desired item directly from its permanent location (that is, without having ordered in advance) to the circulation desk. The barcode is scanned at the circulation desk (see Loaning Items).

- **Returns** – The patron returns the loaned item. The barcode is scanned at the circulation desk (see Returning Items). The item is displayed in the Returns table.
- **Fees and fines** – Fees may be charged for library services (such as digitization), or fines may be levied if, for example, a patron damages a book. The Circulation Desk Operator/Manager can view a patron’s fines/fees and receive payments from a patron if the circulation desk is configured to receive payments (see Viewing Fines and Fees and Receiving Payments). Email and/or SMS notifications may also be set up to notify patrons of their fines and fees (see Sending Patron Notifications for Fines and Fees).

- **Editing patron information** – The Circulation Desk Operator/Manager can make changes to patron information (see Editing Patron Information).

You can create relationships between libraries to enable the libraries to check in and check out items for each other (see Configuring Fulfillment Services Between Libraries Within an Institution).

The Patron Services page allows circulation desk operators and managers to manage patron services.

The Patron Services page displays the following core patron information:

- **Patron Services Page – Loans Tab**
The following keyboard shortcuts are available on the Patron Services page:

- **Alt + 1** – Opens the Loans tab
- **Alt + 2** – Opens the Returns tab
- **Alt + 3** – Opens the Requests tab
- **Ctrl + Alt + D** – Same as selecting Done; returns to the Patron Identification page to enable searching for another patron (see Selecting a Patron)

You can do the following on the Patron Services page:

- Select **Renew All** to renew all items that the patron currently has on loan. The system displays an informational message and sends the Borrowing Activity Letter with the updated due dates, where relevant.
- Select **Renew Selected** to renew all items that are selected on the loan display. The system displays an informational message and sends the Borrowing Activity Letter with the updated due dates, where relevant.
- Select **Refresh Blocks/Notes** to update the notes and check the relevancy of any blocks - whether loans have been returned and the block should be lifted or new loans have been added and a block is newly applicable.
- Renew the patron if the patron's card has expired. When this happens, Alma displays a block that the patron's card has expired. To renew the user, click **Renew** within the block. The renewal period is determined by the User Registration Terms of Use (see Configuring Terms of Use).
- If the patron has a social account attached, select **Detach from Social Account** to disassociate the social login from the patron.
- Select **Edit User Info** to open the Quick User Management page and edit the patron's information. For details on the fields displayed on this page, see Quick User Management Page Fields below.
- Select **Send Activity Report** to send the Borrowing Activity Letter to the patron, which lists patron activity, including loans, overdue items, and active fines.
- Select **Send Return Receipt** to send a return receipt to the specified patron for items returned to the circulation desk during the current session. For details on configuring the sending of receipts automatically, see the relevant field descriptions in Circulation Desk – General Information Fields in Configuring Circulation Desks. For details on customizing the Return Receipt Letter, see Configuring Alma Letters.
- Select **Send Loan Receipt** to send the Loan Receipt Letter to the specified patron for items borrowed at the circulation desk during the current session. For details on configuring the sending of receipts automatically, see the relevant field descriptions in Circulation Desk – General Information Fields in Configuring Circulation Desks. For details on customizing the letter, see Configuring Alma Letters.
- Select **Send Requests Report** to send the Full Requests Report Letter to the specified patron listing all requested items, broken down by Not Active, In Process, and On Hold Shelf.
- Select **Submit Request** to create a request, automatically populating the request with this user’s data. A physical item will have three options for the type of request to be created: Patron Physical, Booking, and Digitization. An electronic item will have an option for Document Delivery. After submitting the request, the user is again returned to the Patron Services page on the Requests tab. You can type in the title or ISBN/ISSN that you want to request, and an
auto-complete will suggest possible matches. If the title you are looking for is not automatically suggested, you can use the search tool to conduct a full search.
For more information about the Submit Request function, see the Place a Request from Manage Patron Services video (1:18 mins).

• Select the link to add or view patron notes. If there are no notes for the patron, the link is Add Note. The link is Edit Notes if there are between one and five notes. If there are more than five notes, the link is More User Notes Exist.
• Select the Loans tab to view the patron loaned items. For details, see Loaning Items.
• Select the Returns tab to view the patron returned items. For details, see Returning Items.
• Select the Requests tab to view the patron’s requested items. The patron’s requests are displayed. For details, see Viewing a Patron’s Requested Items.

• The Patron Services page is set by default to time out after two minutes of inactivity. Optionally, you can configure the Patron Services page to time out between 1 - 30 minutes by modifying the patron_services_timeout_minutes setting on the Customer Parameters Mapping Table page (see Configuring Other Settings).
• A circulation desk role’s ability to view all of a patron’s return history is determined by a configuration preference set during implementation (the default is to view all). If required, work with your Ex Libris Professional Services/Support representative to customize this option differently, for your specific institution’s needs.

For more information about adding the Call Number to fulfillment pages, such as the Loans display above, and selected letters, Watch the Call Number Added to Fulfillment Pages and Letters video (1:02 mins).

Selecting a Patron

Before you can provide services to a patron, you must search for the patron’s information at your local institution.

If your institution belongs to a fulfillment network, you may need to search for the patron’s information at the patron’s home institution and then register the patron at your local institution (see Registering Patrons).

Beside patron selection, the Patron Identification page displays the following actions:

• Go To Return Items – Return patron items (see To return multiple items).
  You can also press Ctrl + Alt + R on your keyboard to return patron items on the Manage Items Returns page.
• Register New User – Register patrons; see Registering Patrons. Note that this should be used for patrons only and not staff users.

![Patron Identification Page](image)

To select a patron whose services you want to manage:

On the Patron Identification page (Fulfillment > Checkout/Checkin > Manage Patron Services), enter or select a patron name in the Scan patron’s ID or search for patron field.

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Note

Before selecting the magnifying glass in the search box, a drop-down list appears. The first ten matching items are retrieved for the list. They are not necessarily the same as the first ten items on the complete patron list. For a full search, use the magnifying glass.
To see a list of recent patrons, select the clock icon.

If the user is acting as a proxy for another patron (see Managing Proxy Users), select Use proxy and select Go. The Proxy for field appears. Select the patron for whom this user is acting as a proxy and select Go again. This patron receives email notifications regarding actions taken on his/her behalf.

The Loans tab on the Patron Services page appears. For details on patron loans, see Loaning Items.

The Patron ID field saves the list of patrons entered during the current session, so that you can select from recent patrons each time you access the page. Due to privacy concerns, this recent list is emptied each time you log out.

## Registering Patrons

Before you can provide services to a patron, the patron must be registered at your institution. In addition, if your institution belongs to a fulfillment network, you can search for and retrieve the patron’s information from the user’s home institution.

When a user from one institution borrows or places requests at another institution, the user’s home institution contact information is refreshed at the servicing institution.

Learn about how Alma creates a linked user in a non-home institution when a user in a fulfillment network requests an item from that institution using their home institution’s Primo in the Request from a Member Institution video (5:59 mins).

### To register a new patron:

On the Patron Identification page (Fulfillment > Checkout/Checkin > Manage Patron Services), select Register New User. The Quick User Management page appears. Follow the instructions in Adding Users. When you are done, select Update User.

The Quick User Management page is slightly different when accessed by selecting Register New User on the Patron Identification page than it is when adding a user from the Manage Users page, as follows:

<table>
<thead>
<tr>
<th>Section</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Information</td>
<td>Primary identifier</td>
<td>A generated value is prefilled in this field. See Configuring User ID Generation. You can change the value.</td>
</tr>
</tbody>
</table>
| User Management Information | Patron has institutional record | Whether the patron is external or internal. Possible values are:  
  - Yes – The patron is external and information is updated by the SIS synchronization process.  
  - No – The patron is internal.  
  If you select Yes, the Owning system field appears. The options that appear are the names of the configured SIS profiles (see Student Information Systems). |

**Note**

Users are normally managed as external users by an external system, such as the Student Information System. External user records are synchronized with Alma using the User integration profile. Internal users are defined (see Managing Users) for users that are not managed in an external system. For example, internal users can be defined for community patrons who are not students, or for alumni. For an in-depth explanation of user management in Alma, see the Development Network.

Institutions whose Student Information System (SIS) does not offer authentication services, can create users as external in Alma, but assign passwords for them directly in Alma. In this case, all the user information is managed from the SIS, but the passwords are stored in Alma and managed by the Ex Libris Identity Service. For these users, the “Password” field remains available in this section. To activate this...
To register a walk-in patron who belongs to another institution in the Fulfillment Network:

1. On the Patron Identification page (Fulfillment > Checkout/Check-in > Manage Patron Services), first check to see if the patron was already registered. Search for the patron ID.

   ![Search for Patron in Local Institution](image1)

   If the patron’s ID is found, proceed with the loan on the Patron Services page. Otherwise, continue to the next step.

2. Search for the ID at the patron’s home institution:
   1. Select **Find user in other institution** to open the Fulfillment Network search fields.
      
      ![Search for Patron at Another Institution](image2)
      
      Note that check box only appears if your institution is part of a fulfillment network.

   2. Select the patron’s home institution in **Institution**.
   3. Enter patron search criteria in the field labeled **Scan patron’s ID or search for patron**. Valid search criteria include patron ID, first name, last name, or email address. The searchable identifiers can be configured by an admin; see **Configuring Searchable User Identifiers**. The search must be an exact match. If the search yields more than one result, an error is returned. If the search is successful, the available fields are populated. The patron's local ID will be their primary ID at their home institution.

**Note**

- To search for a patron by fields other than patron ID, ensure that `fulfillment_network_search_by_all` is set to `true`.
- If an institution has defined hidden identifiers, these identifiers are not used for searches in a fulfillment network unless `fulfillment_network_search_by_all` is set to `true`. For more information, see **Configuring Other Settings**.

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• Your network may be set up not to require selecting an institution from a ‘Find user in other institution’ drop down. Instead, a "Find user in all network institutions" option causes Alma to search for the ID first in the local institution and if not found then in all other participating institutions. Alma automatically finds the user record at any of the network institutions and pulls its information from its institution. Of course, this option should be activated only if the patron used IDs that are unique across the entire network. For this option, set the network_users_unique_identifiers parameter to FULL.

4. Select Find User.

5. The Quick User Management page appears and displays the patron's contact information, which was retrieved from the patron's home institution. Enter the patron's ID in Primary identifier. For more information, see Adding Users.

Note
In a fulfillment network containing members of a Network Zone, Alma may be configured to copy automatically primary identifiers (and other identifiers, such as barcode) from the user's home institution.

3. Select Update User to create the register the patron for your local institution.

The Patron Services page appears, allowing you to manage patron services.

To import a patron from a student management system:

1. Configure the integration profile with the online import fields as detailed on the Student Information Systems page.

2. When the integration profile is configured, Import user from User Management System appears on the Patron Identification page (Fulfillment > Checkout/Check-in > Manage Patron Services). Search for a patron's ID on the Patron Services page. If the ID is not found, select this field.

Online Import

3. Scan or type the patron's ID from the the student management system in the User Identifier field.

4. Select Find User.

5. If the ID is found in the student management system, the Quick User Management page appears and displays the patron’s information that was retrieved.

6. Select Update User to create the patron in the local institution’s Alma. The Patron Services page appears, enabling you to manage patron services.

7. If the patron’s ID does not exist in the external system, select Save to locally register the patron. The new patron information will be transmitted to the student management system.

Editing Patron Information

The Quick User Management page allows you to create and modify a patron’s account and contact information.
To edit patron information:

1. On the Patron Identification page, select the patron account that you want to modify (see Selecting a Patron). The Patron Services page opens.
2. On the Patron Services page, select the Edit info link. The Quick User Management page opens. Follow the instructions in Adding Users, or select Full Information and follow the instructions in Editing Users. You cannot edit the primary identifier or any other user identifier.
3. Select Save. The changes are saved and the Patron Services page opens.

Loaning Items

Items are loaned as part of the circulation desk workflow (see Circulation Desk Operations Workflow), or the patron can bring the item directly from its permanent location to the circulation desk to be loaned.

When loaning an item that does not currently exist in the repository, you can create a new item to be entered into the repository by selecting Create Item (appears if you have the Physical Inventory Operator role – see To create a new item to be entered into the repository).

You can create relationships between libraries to enable a library to loan items for another library (see Configuring Fulfillment Relationships).

For institutions in a fulfillment network or Network Zone, loans belonging to another institution may be seen in the Network Activity tab. For more information, see Viewing Network Activity.

For information on handling lost loans, see Lost Loan Management.

Depending on the Reloan Limit policy, an item that was just returned by a patron may not be immediately reloanable to the same patron. Depending on the policy chosen, you may receive a block message when the loan is attempted. A different copy of the same title with the same material type is considered as a single item for this policy. For serial items, the limit only applies to items with the same description. If the policy is set to none or the time frame for reloaning has passed, the loan will successfully execute. See Reloan Limit.

To loan a requested item:

1. On the Patron Services page (see Selecting a Patron), select the Loans tab. In the Scan item barcode field, scan in or manually type the barcode of the requested item. You may search for an item by typing its title or using the icon. The Repository Search page opens, displaying the search matches.
2. Choose an item and select Select. The item's barcode is displayed in the Scan item barcode field.
3. Select OK. The item details are displayed in the Patron Services Loans tab.

Note

If you manually enter a barcode that does not exist, a dialog box is displayed indicating that the item was not found. You can select Create Item (appears if you have the Physical Inventory Operator role) in the dialog box to create an item with the barcode. For details, on creating a new item, see To create a new item to be entered into the repository.
The Due Date value indicates the item's due date at the time of receiving the item, minus the configured Delivery Delay value on the Resource Sharing Partner page (see Resource Sharing Requests).

For example, if the due date when receiving the item is May 16, 2012 and Delivery Delay = 4, The Due Date value displays as May 12, 2012, to allow 4 days for item delivery and ensure that the item arrives by its 'actual' due date of May 16.

When a loan's due date is after the patron's expiration date as defined in the patron's user details, the loan is shortened and the due date is calculated as the last closing hour of the library before the patron's record expires.

To change the due date when it extends beyond the end of a semester and must be shortened to the end of the semester, see How to Make Items Have Due Dates at the End of the Semester.

4. From the Loan display drop-down list, select one of the following:

The default for the Loan display drop-down list is determined by the remember_last_loan_display parameter (see Configuring Other Settings).

- **All** – displays all items that have been loaned to the patron. When All Loans is selected, an option exists to sort on the Library column.
- **This session** – displays items that have been loaned during the current session.

5. For the relevant loan, select from the following options in the row actions list:

- **Work order** – Creates a request; you can select a work order or other request. See step 2 in To create a request.
- **Delete loan** – Deletes the item from the Loans tab. The item's status changes to Missing (for lost loans) or In Place (for other loans).
- **Change due date** – The loaned item's due date can be changed at or after the loan time (see To change the loan due date when requested by a patron).

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**Note**

- You cannot change the due date on a loan if a calendar is not defined for the specified library.
- If the new due date is after the expiry date of the patron, the date is altered to match the patron expiry date. When this happens a warning message appears to inform you that the due date has been changed. In order for the warning message to display, shortened_due_date_notifications must be set to MESSAGE or MESSAGE_EMAIL. For more information, see Configuring Other Settings.

- **View notes** – View notes on the loan (see Viewing Loan History).
◦ **View queue** – Enables you to view other hold requests that have been placed on the item.

◦ **View policies** – Opens the Fulfillment Configuration Utility page, which enables you to view policies that would take effect for the item if it were loaned to the indicated patron. Displayed information includes the Fulfillment Unit Name, Fulfillment Unit Rule, and Terms of Use associated with the item, as well as the due date and overdue fine information. For details, see Viewing Fulfillment Configuration Information.

◦ **Loan history** – View a history of the loan (see Viewing Loan History).

◦ **Renew** – Renew an item (the Loan Status field value is updated to **Renewed**).

### Note

- If you renew an item before its due date, the new due date is calculated from the date of renewal and not from the previous due date. For example, if an item is due on July 15 and is renewed on July 10, the new due date is calculated from July 10, according to the TOU.

- When a loan renews to the current time, it means that the renewal due date calculated by the system is in the past. This occurs if the user is expired or if the due date policy is a fixed date in the past.

- If **Patron Renewal** is added to a Resource Sharing Workflow Profile of **Type = Lending**, the patron can request renewals from the Primo loan list. Renewal is possible only if allowed by the loan’s terms of use, as it is for non-resource sharing related loans.

◦ **Claimed Return** – Claim an item as returned (see **To claim an item was returned**). When claiming an item as returned:

  - The loan’s status is changed to **Claim Returned**.
  - The item’s **Process Type** value is **Claimed Returned**, and the item remains requestable and is considered to still be on loan.
  - By default, overdue fines accumulated prior to the item being claimed as returned are applied to the patron’s active balance, but no new overdue fines accrue from that point onward. (This functionality, however, can be configured using the **overdue_at_claim_return_loan** parameter. For details, see Configuring Other Settings.)

◦ **Lost** – Specifies that an item is lost and charges the patron (see To indicate a lost item). Ensure that the value of the Loan Display drop-down list is **All**. Select **OK** to add the details of the loan to both the Loan Status column of the Patron Services page and to the Fines/Fees tab of the User Details page (see Editing Users).

6. Before moving to the next patron, or next activity at the circulation desk, you must select **Done** to end each patron session. You are returned to the Patron Identification page.

7. If the **Create Loan Receipt** checkbox in the circulation desk is selected (see Adding a Circulation Desk) and a loan was performed, a Loan Receipt Letter is sent. If the **Send Loan Receipt** checkbox is selected, a Loan Receipt letter (letter code: FulLoanReceiptLetter) is sent to the specified patron for items borrowed at the circulation desk during the current session. For details on configuring the sending of receipts automatically, see the relevant field descriptions in **Circulation Desk – General Information Fields** in Configuring Circulation Desks. If the loan status or the due date has changed, a Loan Status Notice Letter is sent to the patron. For information on customizing letters, see Configuring Alma Letters.

Columns displayed on the loans grid may be selected by selecting on the **Columns** button above the grid.

The columns that display by default are:

- Title
- Due Date
- Barcode
- Fine
- Loan Date
- Loan Status - possible values are: Normal, Normal (with user), Normal (on shelf), Recalled, Lost, Claim Returned,
Renewed, Renewed (with user) and Renewed (on shelf)

Note
The statuses followed by (with user) or (on shelf) are applicable to reading room loans. For more information, see Configuring Loan Status Names.

- Item Policy
- Library
- Loan Notes

The columns that are hidden by default are:

- Call Number
- Loaned at Library
- Loaned at Desk
- Last Renew Date
- Last Renew Status
- Accession Number
- Item Call Number
- Author
- Publication Year
- Location

To create a new item to be entered into the repository (can be performed if you have the Physical Inventory Operator role):

1. On the Patron Services page (see Selecting a Patron), select the Loans tab.
2. Select Create Item. The Choose Holding Type dialog box appears.
3. Choose the holding type and, where relevant, the citation type, and select Choose. The Quick Cataloging page appears.

Quick Cataloging Page
4. Configure resource and item information and select **Save**. For information about the fields, see **Adding a New Book or Journal Article**. A new item is created and entered into the repository. It can then be searched for in the **Scan item barcode** field in the Loans tab.

An Acquisition Technical Services work order is created. For an in-depth overview of work orders, see **Physical Inventory - Defining and managing work orders in Alma**. Note that Alma does not submit a request for the item to be picked from the shelf, since the item is going out on a loan. It will be going into work order when it returns.

**To change the loan due date when requested by a patron:**

1. On the Patron Services page (see **Selecting a Patron**), select the **Loans** tab.
2. Select the loan whose due date you want to change and select **Change Due Date**. The Select Due Date dialog box opens.
3. Select the **New due date** box and select the due date from the **Calendar** dialog box.
4. Optionally, select the time due in the **At** field.

When the time is not specified, the system uses the closing time of the new due date. If the library is closed on that date, the Closed Library Due Date Management Policy is invoked (see the **Closed Library Due Date Management Policy** entry in **Fulfillment Policy Types**.)

5. Select **Change Due Date**. The new date is saved in the **Loans** tab.

A Loan Status Notice Letter email is sent to the patron with the new due date and saved as an attachment to the user record.

6. A Fulfillment Administrator can change the due dates of all loans that are planned for a specific date as a bulk action, such as when the library wants to close on a specific date for some unplanned maintenance work. The system automatically corrects due dates that occur when the library is closed, depending on the library's predefined policies.

**To indicate a lost item:**

1. On the Patron Services page (see **Selecting a Patron**), select the **Loans** tab.
2. In the **Loan display** drop-down list, select **All** and then select the item that is lost.
3. For the lost item, select **Lost** from the row actions list. The Lost Item dialog box opens with the fine/fee information.
4. Select **OK**. The details of the loan are added to the **Loan Status** column of the Patron Services page, and to the **Fines/Fees** tab of the User Details page (see **Editing Users**).

**To claim an item was returned:**

1. On the Patron Services page (see **Selecting a Patron**), select the **Loans** tab.
2. In the **Loan display** drop-down list, select **All** and then select the item that is claimed to have been returned.
3. Select **Claimed return** from the row actions list. The value of the **Loan Status** column changes to **Claimed returned**.

**To view loan notes:**

1. On the Patron Services page (see **Selecting a Patron**), select the **Loans** tab, and select an item.
2. In the **Loan display** drop-down list, select **All** and then select the item that is claimed to have been returned.
3. Select **View notes** from the row actions list. The Loan Notes page opens.

For more information on adding, editing, and deleting notes, see **Notes Tab**.

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**Viewing Loan History**

You can view a loan’s history on the Loan Audit Trail page.

**To view loan history:**

1. On the Patron Services page (see [Selecting a Patron](#)), select the **Loans** tab.
2. In the **Loan display** drop-down list, select **All**.
3. Select **Loan history** from the row actions list for an item. The Loan Audit Trail page appears, displaying the actions taken on the specified item.

![Loan Audit Trail](Image)

**Loan Audit Trail Page**

The available actions (displayed in the **Action** column) appear in the following table:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal</td>
<td>Indicates that the item was checked out. This is an item’s initial status.</td>
</tr>
<tr>
<td>Recalled</td>
<td>The item was recalled by the library</td>
</tr>
<tr>
<td>Renewed</td>
<td>The item was renewed by the patron</td>
</tr>
<tr>
<td>Lost</td>
<td>The item has been declared lost, based on the configured lost loan profiles (see <a href="#">Configuring Overdue and Lost Loan Profiles</a>)</td>
</tr>
<tr>
<td>Lost with overdue charge</td>
<td>An overdue fine was incurred when the item was declared lost</td>
</tr>
<tr>
<td>Claim returned</td>
<td>The user claims to have returned the item</td>
</tr>
<tr>
<td>Claim returned with overdue charge</td>
<td>An overdue fine was incurred when the item was claimed returned</td>
</tr>
<tr>
<td>Reading room with user</td>
<td>The resource is in the library, in use by a user (patron)</td>
</tr>
<tr>
<td>Reading room on shelf</td>
<td>The resource in the library, on the shelf but reserved for a user (patron)</td>
</tr>
<tr>
<td>Web change forward</td>
<td>The loan’s due date has been moved forward</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Web change backward</td>
<td>The loan’s due date has been moved backward</td>
</tr>
<tr>
<td>Bulk change forward</td>
<td>The loan’s due date has been moved forward by a job</td>
</tr>
<tr>
<td>Bulk change backward</td>
<td>The loan’s due date has been moved backward by a job</td>
</tr>
<tr>
<td>Automatic renewed</td>
<td>The loan was renewed by an automatic renewal job</td>
</tr>
<tr>
<td>Undo return</td>
<td>The SIP2 machine cancels the <strong>Check in</strong> message</td>
</tr>
<tr>
<td>Undo renew</td>
<td>The SIP2 machine cancels the <strong>Renew</strong> message</td>
</tr>
<tr>
<td>Item was found</td>
<td>An item declared <strong>Lost</strong> or <strong>Claimed returned</strong> has been found</td>
</tr>
<tr>
<td>Loan</td>
<td>The loan was initiated for the item</td>
</tr>
</tbody>
</table>

**Note**
The Operator column appears only for managers and administrators. See [Configuring Users’ Ability to View Operator Details](#).

**Lost Loan Management**

Overdue items can be marked as lost by the Circulation Desk Operator in one of the following ways:

- When a patron notifies the circulation desk that the item is lost
- By configuring the number of days after which an overdue item’s status is automatically changed to **Lost**

The following is an illustration of the actions that can be performed on lost loans.

![Diagram of actions for lost loans](image)

**Lost Item Management**

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The following is a detailed description of the actions that can be performed on lost loans:

1. You mark an item as lost in one of the following ways:
   1. On the Patron Services page (Fulfillment > Checkout/Checkin > Manage Patron Services), locate the patron that borrowed the item and select Lost from the row actions list for the relevant item.
   2. Configure an item to automatically be marked as lost after it is overdue for a specified number of days. This is done on the Lost Loan Profile Record page (Configuration Menu > Fulfillment > Physical Fulfillment > Overdue and Lost Loan Profile, select Add Overdue and Lost Loan Profile). For details, see Configuring Overdue and Lost Loan Profiles.

2. You can search for items marked as lost by performing an advanced search in the repository. Select the Advanced Search link and in the Physical Items column, select Process Type. On the Advanced Search page, select Equals and Lost in the drop-down lists and select Go. For details on advanced searches, see Performing an Advanced Search.

You can also configure the following:

- Lost items can be excluded from appearing in repository searches (configurable in Configuration Menu > Resources > Record Export > Exclude Process Types from Publishing). For details, see Excluding Resources with Specific Process Types from Publishing.
- Lost items can be configured as searchable but not as requestable. This is done on the Fulfillment Rules Editor page (Configuration Menu > Fulfillment > Physical Fulfillment > Fulfillment Units, select Edit from the row actions list for a Fulfillment Unit and select the Fulfillment Unit Rules tab). For details on configuring Fulfillment Unit Rules, see To add fulfillment unit rules.

3. You can configure policy types for lost loans which determine how lost loans are handled. Parameters are configured in Fulfillment Configuration (Configuration Menu > Fulfillment > Physical Fulfillment > Advanced Policy Configuration > Add Fulfillment Policy) by selecting the following fulfillment policy types:
   - Lost Item Fine – The fine which the patron is required to pay for losing the item.
   - Lost Item Replacement Fee – The amount charged to the patron for the institution to replace the item.
   - Lost Item Replacement Fee Refund Ratio – The percentage of the lost item replacement fee that the institution is willing to refund to the patron if the lost item is found.

   **Note**
   A lost item fine cannot be refunded.

   For details on selecting policy types, see Configuring Policies.

4. You can create a fulfillment set that displays a list of all items lost from a specific date (Fulfillment > Advanced Tools > Create Fulfillment Sets, and configure the Loan status value as Lost). For details on configuring fulfillment sets, see Managing Fulfillment Sets. You can then view the fulfillment set on the Manage Sets page (see Managing Search Queries and Sets).

5. If the close_paid_lost_loan parameter is set to true, when an on loan item’s status is changed to Lost and the last lost or replacement fee is closed, the loan status is changed to Lost and paid and the loan is removed from the active loans list (see Configuring Other Settings (Fulfillment)). You can close lost loans by running the Close lost loans job (see Running Manual Jobs on Defined Sets). This job closes all loans in the fulfillment set. Any fines or fees associated with the loan remain on the patron’s record. If a lost item is returned after the loan has been closed, the patron is not refunded for the replacement fee.

   **Note**
   If an item is determined to be lost and the policy for a lost loan is Not Requestable, the Requests - Recalculate After Inventory Update job detaches the request from the item and potentially cancels the request (if no other items can be used for fulfilling the request). If the item is found, this job re-links the request to the item. For details, see Requests – Recalculate after Inventory Update in Viewing Scheduled Jobs.

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Returning Items

When an item is returned, you scan its barcode and return it to its proper location, which may be in a different institution.

Managing item returns enables you to view the loan and usage history of returned items. This information is collected when its barcode is scanned. If the barcode cannot be read, you can search for the item. Note that if the item does not have a barcode, you must first assign a barcode to the item record before scanning in or returning the item. Barcodes are required in order to circulate items or move them within the library using the scan in or return features.

Loan and usage history information is available in Analytics reports (see Users) and in the More Info dialog box for imported records (see the More Info description in Viewing Imported Records).

Loaned items can be returned in either of the following ways:

- Individually – For items loaned to a single patron (see To return an individual item)
- Bulk – For items loaned to more than one patron; used to streamline operator workflow and enhance productivity (see To return multiple items)

The returned item is logged in to the system, reshelved, and made available for loaning. The history of returned items is saved indefinitely.

Usage history information can be viewed in the returns tab if the All Returns filter is selected. Note that:

- The privilege to view a patron’s usage history may be disabled by Ex Libris. Please contact Ex Libris support if you would like to disable this privilege.
- Loan history may be anonymized. It is possible to configure how loan records will be anonymized by using the Loan Anonymization Rules. For more information, see Configuring Anonymization.

The Resource Sharing Return Slip Letter is printed when returning a borrowing item to the lender. For more information, see Configuring Alma Letters.

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Note

For detailed information on in-house loans, see In-House Use and Alma Analytics Reports for In-House Use.

Alma can be configured to allow a patron to return items to any member of a fulfillment network, regardless of the institution from which the patron checked out the item. This feature is called Return Anywhere. For example, if University A and University B are members of the same fulfillment network, a patron could check out a book at University A and check it in at University B. See Fulfillment Networks.

Accepting items for return from a different institution is available only if your institution is a member of a fulfillment network and has a Circulate For relationship to another member of the network (see Configuring Fulfillment Relationships). When the return is entered, The Ful Transit Slip Letter is printed at the institution accepting the return. The returned item is sent to the originating institution and marked as In Transit.

For more information about returning items from different institutions in a fulfillment network, see the Return Anywhere video (2:35 mins).

When items are loaned to and returned by a proxy user, they are stored in the loan and usage history of the borrowing patron only (and not the proxy user). For details on working with proxy users, see Managing Proxy Users.

When returning a requested item on a self-check machine, there is no resource request slip generated.

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The return date is checked to determine if there is an overdue fine. If necessary, you can indicate that:

• The item was already returned (see To claim an item was returned)
• The item was lost (see To indicate a lost item)

To return an individual item:

1. On the Patron Services page (see Selecting a Patron), select the Returns tab.
2. From the Returns display drop-down list, select one of the following:
   ◦ All – displays all items that have been returned by the patron
   ◦ This session – displays items that have been returned during the current session
3. Scan or enter the barcode or select

   and select the item being returned, and select OK. The item details are displayed.
4. For the relevant loan, select from the following options in the row actions list:
   ◦ Work order – Creates a request; you can select a work order or other request (see step 2 in To create a request)
   ◦ Loan history – View the audit trail of an item’s loan history (see Viewing Loan History)
   ◦ View notes – View notes regarding a loan (see To view loan notes)
   ◦ View queue – View the queue of requests for an item
5. Select Done. You are returned to the Patron Identification page. If the Creates return receipts check box in the circulation desk is selected (see Adding a Circulation Desk) and a return was done, a return receipt will also be sent.

Columns displayed on the returns grid may be selected by selecting on the Columns button above the grid.

The columns that display by default are:

• Title
• Return Date
• Due Date
• Barcode
• Fine
• Loan Date
• Owned By Library

The columns that are hidden by default are:

• Call Number
• Accession Number
• Item Call Number
• Author
• Publication Year

To return multiple items:

1. Open the Manage Item Returns page (Fulfillment > Checkout/Checkin > Return Items).
2. Scan or enter the item barcode in the **Scan item barcode** field, or select

and select the item from the displayed list.

3. In the **Place directly on hold shelf** field, select the relevant option, as follows:
   - **Yes** – The item is to be placed directly on the hold shelf. An On Hold Shelf Letter is sent to the patron, indicating that the item is ready for pickup at the hold shelf (see Configuring Alma Letters).
   - **No** – The item is not yet ready for the hold shelf and is to be designated for hold shelf processing (that is, preparing the item for the hold shelf, such as checking the item’s condition). After hold shelf processing is complete, scan the item into the relevant circulation desk. The item is placed on the circulation desk’s hold shelf, and an On Hold Shelf Letter is sent to the patron, indicating that the item is ready for pickup at the hold shelf (see Configuring Alma Letters).

This field is displayed only when the **Has hold shelf processing** option is selected when configuring a circulation desk (see Configuring Circulation Desks).

4. Select **OK**. The item details are displayed on the Manage Item Returns page.

You can use the following keyboard shortcuts on the Manage Item Returns page:
   - **Alt + Ctrl + L** – Opens the patron identification page (see Selecting a Patron)
   - **Alt + Ctrl + C** – Clears the list of returned items
   - **Alt + Shift + X** – Returns to the Alma homepage

5. If needed, modify the return date. One reason to modify the return date would be for items that were returned in an overnight drop box during the prior day. The date is modified as follows:

   1. On the Manage Item Returns page, select **Override return date and time** and select the return date and time.
   2. Select **Apply**. The return date and time is changed on the Manage Item Returns page.

To reset the return date to the current date, select **Reset Return Date**.

**Note**

The return date defaults to the current date. The date should only be set to current date or a date in the past.
6. If required, select one of the following options from the row actions list:
   - **Work order** – Creates a request; you can select a work order or other request (see step 2 in To create a request)
   - **Loan history** – Displays an audit trail of an item’s loan history see Viewing Loan History
   - **View notes** – Displays notes on the loan (see To view loan notes)
7. Select Exit to exit the page, or select Go to Patron Services to open the Patron Identification page.

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**Viewing Fines and Fees and Receiving Payments**

Patrons may incur fines and fees for many reasons. Circulation desk operators view and receive payments for patron fines and fees on the Fines and Fees tab on the User Details pages (see Viewing a Patron’s Fines and Fees and Receiving Payment for Fines and Fees).

If payments are made online using the WPM Education e-payment system, circulation desk operators may need to manually record any transactions that patrons paid directly to the WPM Education e-payment system. These payments are tracked by their payment method (online) and the transaction ID, which is sent in the patron’s transaction confirmation message from the WPM Education e-payment system. To handle these types of transactions, see Recording Online Payments Manually.

After a payment is received from a patron, Alma sends the Fine Fee Payment Receipt Letter to the patron. To configure the message, see Configuring Alma Letters.

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**Viewing a Patron’s Fines and Fees**

The Fines and Fees list below displays fines and fees that have been charged to the patron.

**To view a patron’s fines and fees:**

1. On the Patron Identification page (Fulfillment > Checkout/Checkin > Manage Patron Services), enter the patron’s name in the Scan patron’s ID or search for patron field and select Go.

   The Patron Services page appears.

2. Select the value in the Active balance link.

   The Fines/Fees tab on the User Details page appears, which lists all fines and fees for a patron.

For institutions in a fulfillment network, fines and fees for loans belonging to another institution may be seen in the Network Activity tab. For more information, see Viewing Network Activity.
The Fines and Fees Summary area displays amounts for:

- Active balance
- Disputed balance
- Transferred balance
- Currently filtered balance
- Currently filtered disputed balance

For details on adding fines and fees, see Assigning Fines/Fees to Users.

3. Select **Save** or **Cancel** to return to the Patron Services page.

### Sending Patron Notifications for Fines and Fees

Libraries can set up notifications to users about fines/fees. See Configuring Fines/Fees Notifications. The notifications are sent by the Fines/Fees Notifications job. See Configuring Fulfillment Jobs.

### Receiving Payment for Fines and Fees

The Patron Services page enables circulation desk operators to receive payments from patrons for fines and fees.

To receive payments:

1. On the Patron Identification page (Fulfillment > Checkout/Checkin > Manage Patron Services), enter the patron’s name in the **Scan patron’s ID or search for patron** field and select **Go**. The Patron Services page appears.

2. Select the **Pay** link to the right of the **Active balance** link. The pay link appears only when the operator is connected to a circulation desk (see Library/Desk Selector in The Persistent Menu).

   The Payment Details dialog box appears with the **All Fines** radio button selected as a default. This selection displays the entire outstanding balance in the payment amount.
3. Under the **Operator name**, select whether you want to pay all of the patron’s fines (**All fines**), or only specific fines (**Specific fines**).

When selecting **Specific fines**, the **Fines to pay** field appears.

1. Select the Browse icon to specify the specific fines to be paid. The User Fines and Fees page appears. You can filter the fines and fees display to show only fees for a specific fee owner in the **Fee Owner** filter.

2. Select the check boxes of the fines and fees that you want to pay and select **Select**. The balance of the selected items displays in the **User balance** field.
For more information about paying specific fines and fees, see the Pay Specific Fines and Fees video (5:02 mins).

4. In the Payment method drop-down field, select a payment method (such as Cash, Check, Credit Card, Debit Card, or Online). For information on online transactions, see Recording Online Payments Manually.

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**Note**

Payment method options can be customized. For example, you can change the Check option to Cheque. To customize payment methods, contact Ex Libris Support.

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5. Select Add change to balance to indicate that when paying an amount greater than the balance, a credit is to be generated for the extra payment. If this box is not selected, the system returns the extra payment to the patron.

6. In the Payment amount field, enter the payment amount you are receiving.

7. In the Transaction ID field, enter a transaction ID.

8. In the Comment box, enter descriptive information for the fine/fee.

9. Select Send and then select Confirm in the Confirmation message dialog box to pay for the fines. The Patron Services page appears and displays the updated balance.

You can also pay specific fines/fees in either of the following ways:

- Self-check machines – If the self-check integration profile has been set up with the Extended Fines and Fees extension type, the SIP2 Fee Paid action can receive the following field pairs:
  - BZ – Payment transaction number, to attach to payment section
  - EK – Fee to be paid
  
  For details on self-check machines, see Self-Check Machines.

- Web service – See https://developers.exlibrisgroup.com/alma/apis/users

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**Recording Online Payments Manually**

If a payment is made directly to the WPM e-payment system, Alma may not be made aware of the transaction. The Patron
Services page enables circulation desk operators to manually record payment information for these types of transactions in order to update a patron’s account.

To manually record online payments:

1. On the Patron Identification page (Fulfillment > Checkout/Check-in > Manage Patron Services), enter the patron’s name in the Scan patron’s ID or search for patron field and select Go.

   The Patron Services page appears.

   ![Pay Link on Patron Services Page](image)

2. Select the Pay link. The Payment Details dialog box appears.
3. Select Online from the Payment method drop-down list.
4. Enter the payment amount and transaction ID, which are both listed in the user’s transaction confirmation email.
5. Select Send.

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**Viewing a Patron's Requested Items**

You can view a list of requested items in the Requests tab. Enter your search criteria in the Find box at the top of the page and select Go, or select a context in which to search from the Request Type or Task filter.

For institutions in a fulfillment network, items on the hold shelf belonging to another institution may be seen in the Network Activity tab. For more information, see Viewing Network Activity.

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**Patron Services Page – Requests Tab**

This page allows you to perform the following actions per item in the list:

- To edit the request, select Edit from the row actions list. The Create Request page opens, enabling you to edit the request’s parameters (see Creating a Request).
- To cancel the request, select Cancel from the row actions list.
- To update the expiration date of the request, select Update Expiry from the row actions list.
- To view this title in the context of the search screen, select View title in search from the row actions list.
Resource sharing requests with multiple items will show a line for each of the items received. In contrast, the Primo My Account request list shows only one line item per request. This is because Primo displays only the resource sharing request, regardless of how many items shipped to fulfill the request, while Alma displays all the items to the operator that are on shelf or in transit. For more information, see Resource Sharing Requests with Multiple Items.

Columns to be displayed on the requests grid may be selected by selecting on the Columns button above the grid.

The columns that display by default are:

- Title
- Request Type
- Request Date
- Start Time
- End Time
- Expiry Date
- Task
- Process Date
- Managed By
- Place in Queue
- Resource Sharing Request

The columns that are hidden by default are:

- Library
- Location
- Call Number
- Author
- Publication Year

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**Note**

The **Resource Sharing Request** column indicates the status of the resource sharing request. If no resource sharing request exists, the value of this column is **No**. This is a sortable column.