

## Circulation

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### General

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#### How is circulation managed in Alma?

In developing Alma, Ex Libris has moved beyond the traditional ILS concept of circulation, to ensure fulfillment for end-users across a unified set of print, electronic and digital resources. This is much more than circulation, and it's why we use the term "fulfillment" rather than circulation when describing the various patron services.

Alma's Smart Fulfillment framework is a suite of functions that manage the delivery of resources to end users. It encompasses print circulation requesting and policies, electronic link resolution, and digital access and rights management. The focus of Smart Fulfillment is on maximizing the exposure of available resources and delivering options to end users in terms that matter to them, rather than according to the behind-the-scenes processing that library staff engages in to fulfill the request.

At the heart of user interaction with Alma is the Smart Fulfillment services menu. Working in conjunction with the discovery application, the services menu presents all options to patrons regardless of format. Taken together, the services menu greatly simplifies patrons' experience of getting the resources they want.

- Alma responds to requests with a services menu that combines direct links to local digital or publisher-hosted electronic resources, physical resources available on the shelf, and requests that users may place on any resources.
- Options are filtered by patron rights—e.g., access restrictions on a digital resource will prevent patrons from seeing a link they can't actually access.
- Services are arranged and presented according to library-defined rules—e.g., libraries may suppress the more expensive ILL option if the resource is available electronically.
- Link resolution is built into Alma as a core function of e-resource management; there is no need for a separate link resolver.

A key goal in Alma fulfillment is to simplify policy management. Simple library policies are clearer to library patrons, are simpler to administer and update, and are easier to analyze and tune to meet the library's needs. All of these policy settings are determined by the library.

One of the core concepts in Alma fulfillment is the "Terms of Use" for library resources – regardless of format. The Terms of Use defines a bundle of individual rights, e.g. loan period, renewals, fine policies, etc. Once defined, the Terms of Use becomes reusable for many combinations of patrons and items.

This simple, yet flexible, approach allows institutions to focus on actual policies, rather than creating and maintaining matrices and complex collections.

< Terms of Use Management 1 2 Cancel

Description: Requests for Faculty

Terms of Use Policies

Policy Type	Policy Name
1 Is Requestable	Requestable (Requestable)
2 Pickup Locations	Anywhere (Default value for Pickup - Anywhere)
3 Hold Shelf Period	7 day Hold Shelf (Default value for HoldShelfPe)
4 Is Digitizable	Is Digitizable (Default value for digitizable)
5 Is Requestable for Resource Sharing	Requestable For Resource Sharing (Item is req)
6 Request Priority	High (High)
7 On Shelf Request Policy	Allow for pickup anywhere regardless of availal
8 Personal delivery	Personal Delivery - All (Deliver items to a home)

Policy setting in Alma can be done for a wide variety of parameters, including loan rules, limits, calendar settings, and more. These policies can be enforced globally or at the branch level. An important concept in policy administration is the ability to inherit policy settings from higher locations in the organizational structure, such that global policies need to be defined only once, and become inherited by libraries and branches within the organization. Policies that are specific to lower levels in the organization are then locally defined and override the institutional settings.

For traditional functionality such as loans and returns, Alma focuses on creating clean interfaces that support staff work, as well as building out the self-service checkout via SIP2.

A configuration table in Alma allows for defining fines and fees related to various activities in the library – e.g., overdue fine, registration fee, notification fee, lost item charge, etc.

In addition, it is also possible to define if:

- a fine/fee can be waived;
- it can be created manually, or is automatically generated by the system;
- it can be refunded;
- the fine/fee is on the level of the library or the institution.

For example, loans are checked at the time of return to see if they are overdue. If a loan is found to be overdue, overdue policies are consulted to correctly calculate the fine. Fining policies may be set per days or hours and per open time or calendar dates. Fines may be controlled by a minimum and maximum fine policy. Also, grace time policies which allow additional time past an item's due date or time, may prevent creation of a fine even when an item is overdue.

Fine/Fee type	Waiveable?	Manual creation?	Refundable?	Fine/Fee owner	VAT Percentage
22 Lost item pi	True	True	False	Library	
23 Lost item re	True	True	True	Library	0
24 New user fe	True	True	True	Institution	0
25 Notification	True	False	True	Library	0
26 Other	True	True	True	Library	0
27 Overdue fin	True	False	True	Library	0
28 Overdue no	True	False	True	Library	0
29 Overdue Lo	True	False	True	Library	0
30 Patron regi	True	True	True	Library	0
31 Personal de	True	False	True	library	0

Patrons can be charged fees for various types of activities, such as signing up for a course, extra education services, and so forth. Thus, many institutions handle patron-related charges in a dedicated bursar system. This can be the institution's ERP system or a system that is in charge of patron-related finance. Institutions export fine and fee information from Alma to

the bursar system. Exported fines and fees are considered closed in Alma, since they are handled outside of the library's scope.

In general, the export of fines and fees is handled using XML files that are placed by Alma at a predefined FTP location. These XML files can then be fetched by the bursar system. The workflow is illustrated in the diagram below:



To export fines and fees from Alma to a bursar system, an integration profile must be defined, and Alma includes templates for this. Additionally, institutions that have multiple bursar system can define a separate profile for each bursar system:

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## Does Alma support integration with self service systems?

For more detail see: [General - Integrations - Self Service](#)

Patrons can access their account information from self-service kiosks using the SIP2 protocol. Alma has been integrated with the self-service systems from vendors such as 3M, Bibliotheca, Envisionware, and Checkpoint. Alma supports intelligent self-service devices using the SIP2 protocol. This includes support for issues, returns, and renewals from RFID self-check machines.

Alma allows for the definition of any number of Self-Check Integration Profiles. The staff user is guided through a short wizard to define the parameters relevant for the Self Check unit.

Learn about Self-Check machines in the Integration with Self-Service Systems video: <https://www.youtube.com/watch?v=Z-q-mCc33Bo&hd=1>

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## Does Alma support RFID?

For more detail see: [Integrations - RFID](#)

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## Does Alma support floating collections?

Alma can track and manage the temporary assignment of ownership from one library to another (i.e., from its permanent location to a temporary one). When an item is registered at a temporary location, standard processes for managing temporarily shelved inventory are used. This includes:

- Reports for items that are due back to their permanent location
- Automatic requests being placed to re-shelve the items back to their permanent shelving locations.

The items at their registered locations use the fulfillment policies and rules of the new location while being marked as being permanently owned by the other library.

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## Is in-house usage registered in Alma ?

In-house loans are recorded when an item is scanned but not checked out (a non-circulating item that is used by a patron,

then scanned and re-shelved by staff, for example). A typical workflow for in-house use stats include staff members scanning in books that have been found on tables but not checked out of the library or on loan. When staff members return an item that does not have a loan, Alma indicates as such:

Scan in Items    Change Item Information

Place directly on hold shelf  Yes  No

Automatically print slip  Yes  No

**Register in-house use**

Item from another institution

Work Order Type

Scan item barcode \*

Scan request ID

Each time a return is made for the item that does not have a loan, an in-house use is registered:

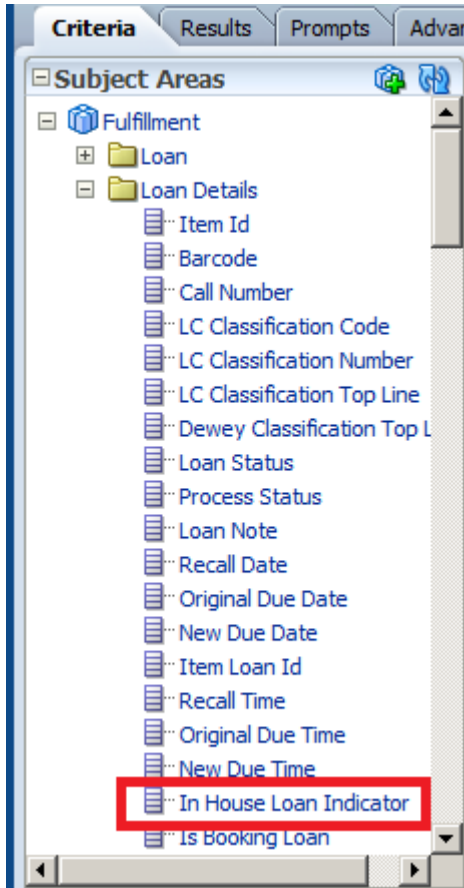
1  **Everybody loves my baby, but my baby don't love nobody but me / words & music by Spencer Williams**  
Jack Palmer.

Book By Williams, Spencer, (New York : C Williams [c1924])    **Call Number Type:** Library of Congress classification    **Requests:** 1  
**Barcode:** 140-10    **Status:** Item not in place  
**Update Date:** 08/02/2015    **Item Policy:** Four Week Loan  
**Library:** Main Library    **Material Type:** Book  
**Process type:** Hold Shelf  
**At Library:** Main Library - Main Circulation Desk  
**On Hold Expiration Date:** 06/17/2017  
**Permanent Location:** General

Other details

Related Records	0	Orders	0
Number of loans	50	Requests/Work orders	1
Last in house loan date	06/29/2016	Last Loan Date	10/30/2016
Courses	0	Number of in house loans	9
		Year-to-Date Loans	0

It is also possible to retrieve the information pertaining to in-house use in Alma Analytics:

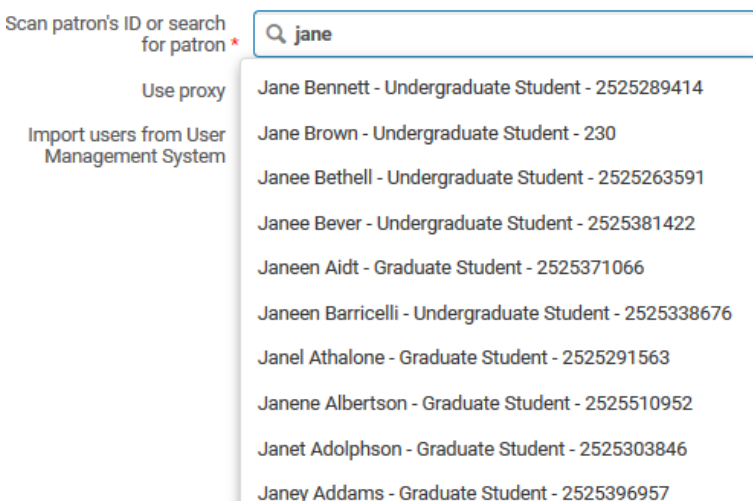


## Checkout

### What mechanisms are supported to scan or read material and patron identifiers into Alma?

Barcodes and RFID tags can be used to scan material and patron identifiers, using any reader that will output identifiers.

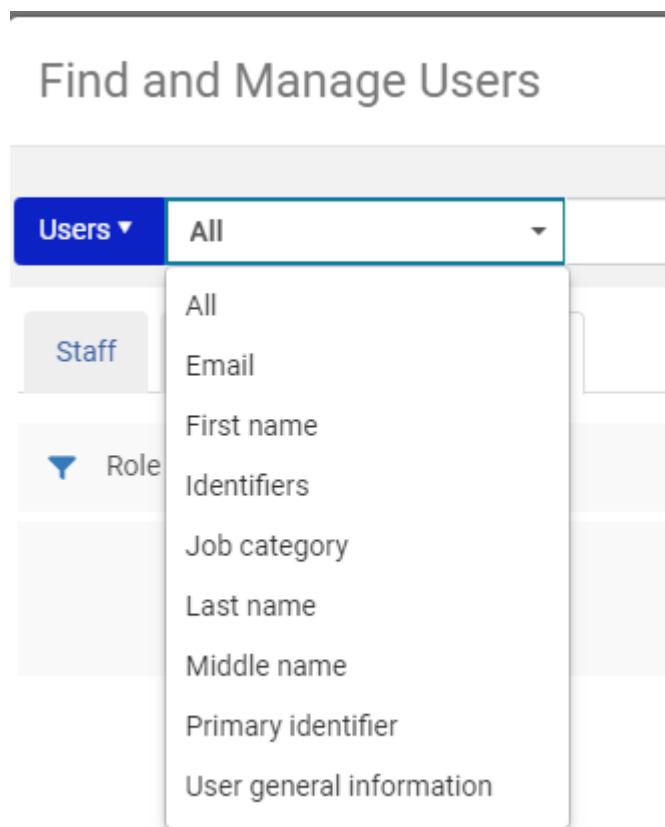
In addition, the staff user can type in the name or title of the patron. Alma will display a list of matches, and the appropriate line can be then be chosen.



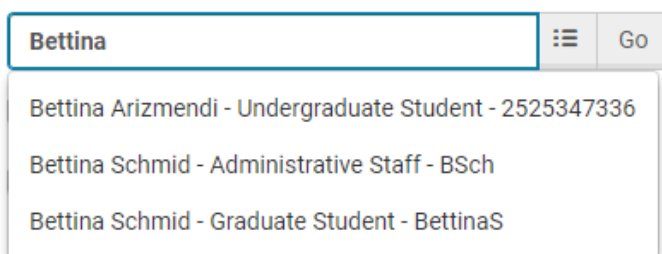
## What are the options for searching for a user record from the checkout screen?

Users can be searched by a number of criteria:

- All (criteria listed below)
- E-Mail
- Name
- First Name
- Middle Name
- Identifiers – you can define and use various identifiers (such as library card number, barcode(s) and other identifiers)
- Job Category
- Primary Identifier
- User general information



Users are instantly searched when typing in the first letters or other identifiers (e.g. barcode).



Scan patron's ID or search for patron \*  Go

Use proxy

Import users from User Management System

- Brad C Blais - Undergraduate Student - 2525305098
- Erminia Blaine - Undergraduate Student - 2525305092
- Richard J Amasa - Graduate Student - 2525305099

## Are there any limitations on the type, length, and format of barcodes for items and patrons?

There are no limitations on the type, length, and format of barcodes for items and patron account numbers.

## What information is available from the checkout screen?

The Patron services page include the following activities:

- **Viewing requests** – The Circulation Desk Operator/Manager can view a list of items requested by the patron
- **Loans** – Current loans with the options to renew loans, add/scan in further items,
- **Returns** – Returned loans of either the current session or all returns
- **Fees and fines** – The active balance is shown with the option to pay fines/fees (full, partial, item/case related)
- **Editing patron information** – The Circulation Desk Operator/Manager can make changes to patron general information.

When clicking a resource in the Patron services page the user is routed to the Loan Audit Trail that shows brief bibliographic details and the loan history (unless not anonymized). Clicking the item's barcode allows to enter the item record that link to the holding and bibliographic record view. With a cataloguer's role users can enter the Metadata editor to edit the bibliographic or holding record.

## Does Alma record the date and time that an item was checked out?

The loan date can be seen on the patron services screen. Loan date and time can be seen on the loan history screen (from the Actions button on the line item):

Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy	Library
1 <input type="checkbox"/> Essays on the Church in Canada, with an introduction by His Grace the Archbishop of Toronto.	07/11/2017 20:00	340-10	-	05/13/2017	Normal	Four Week Loan	Main Library
2 <input type="checkbox"/> Romeo and Juliet / William Shakespeare; editor Celeste Flower.	07/04/2017 20:00	222-10	-	05/13/2017	Normal	Three Week Loan	Renew Work Order Loan History
3 <input type="checkbox"/> The round house / Louise Erdrich.	06/16/2017 21:00	AU40429	8.00 USD	05/25/2017	Renewed	-	Lost Claimed Return
4 <input type="checkbox"/> 10 minute guide to Effective leadership / by Andrew J. DuBryn.	06/16/2017 21:00	AU41400	-	04/28/2017	Renewed	Four Week Loan	Delete Loan Change due date

Loan Audit Trail

Cancel

Title: The round house / Louise Edrlich.

Description: -

Borrower: Sara Carr

Loan Date: 05/25/2017 23:23

Due Date: 06/16/2017 21:00

Loan status: Renewed

Process ID: 2899832830000121

Return Date: -

Booking loan?: No

Action Date	Action	Due Date	Loan Status	Desk	Operator	Additional Information
1 06/09/2017 17:01	Renewed	06/16/2017 21:00	Active	Main Circulation Desk	Jessie Ransom	-

## Does the checkout screen display the patron's overdue items, fines, blocks etc.?

Loading a patron record shows the patron's warnings – such as overdue items, on hold shelf items and existing fees:

Patron Services

Edit User info Submit Request Refresh Blocks/Notes Done

Sara Carr

Active balance: 20.25 USD [Pay](#)

Send Activity Report  
Send Requests Report  
Send Returns Receipt  
Send Loan Receipt

User Notes

User has 2 item(s) waiting for pickup at Resource Sh...  
forgotten umbrella in library  
Don't forgive any more fines  
See registrar--You need to update your address

## Can due dates be manually overwritten when issuing an item?

From the Patron Management Service screen the operator can change the due date of an item by clicking on the Change Due Date button. The staff user may choose to change the due dates of one, all or selected loans by clicking on the selected check boxes. The due date can also be changed inline from the Actions (...) button:

1 - 5 of 5

Barcode

Renew Selected Renew All **Change due date**

Loan Display: All loans

Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy	Library
1 <input type="checkbox"/> Essays on the Church in Canada, with an Introduction by His Grace the Archbishop of Toronto.	07/11/2017 20:00	340-10	-	06/13/2017	Normal	Four Week Loan	Main Library
2 <input checked="" type="checkbox"/> Romeo and Juliet / William Shakespeare; editor Celeste Flower.	07/04/2017 20:00	222-10	-	06/13/2017	Normal	Three Week Loan	Main Library
3 <input type="checkbox"/> The round house / Louise Edrlich.	06/16/2017 21:00	AU40429	8.00 USD	05/25/2017	Renewed	-	Renew Work Order Loan History
4 <input type="checkbox"/> 10 minute guide to Effective leadership / by Andrew J. DuBrin.	06/16/2017 21:00	AU41400	-	04/28/2017	Renewed	Four Week Loan	Lost Claimed Return Delete Loan
5 <input type="checkbox"/> Three-quarters of a century (1807 to 1882) [microform] : a retrospect / written from documents and memory in 1877-1882 by	06/30/2017	162-10	0.50 USD	04/28/2017	Renewed	Three Week	<b>Change due date</b>

## Can staff see a patron's fines and fees from the checkout screen?

From the user details the Fines & Fees tab provides a list of fines and current balance:

User Details Cancel Save


Fine/Fee type: All Status: Active

Creation Date	Fine/Fee type	Status	Status Date	Comment	Fee Owner	Title	Item Barcode	Original Amount	Remaining Balance
06/09/2017	Overdue fine	Active	06/09/2017	Date generated: 06/09/2017, Due: 06/08/2017, Fine Policy/fine: Overdue fines, Action: Renewed	Main Library	Three-quarters of a century (1807 to 1882) [microform] : a retrospect / written from documents and memory in 1877-1882 by Augustus J. Thebaud; edited by Charles G. Herbermann.	162-10	0.50 USD	0.50 USD
06/09/2017	Overdue fine	Active	06/09/2017	Date generated: 06/09/2017, Due: 06/01/2017, Fine Policy/fine: Overdue fine policy: 1 per open day, Action: Renewed	Main Library	The round house / Louise Erdrich.	AJ40429	8.00 USD	8.00 USD
05/09/2017	Photo copy service	Active	05/09/2017		Main Library			5.00 USD	5.00 USD

## Can a list of a patron's items out on loan be generated?

From the Manage Patron Services screen, there is the option to send an a number of reports (activity, requests) and receipts to the patron.

Patron Services Edit Us



**Sara Carr**

Active balance: 20.25 USD Pay

ID: Sara Carr

User group: Undergraduate Student

[Send Activity Report](#)  
[Send Requests Report](#)  
[Send Return Receipt](#)  
[Send Loan Receipt](#)

ExLibris

### Borrowing Activity Letter

Kim Best

Dear Mr./Ms. Best

We would like to remind you that you have the following items at your disposal:

**Overdue Loans**

Title	Description	Author	Due Date	Fine	Library
Scope and methods of the Central Planning Bureau.		Netherlands. Centraal Planbureau.	01/06/2014		Main Library
The probation service in England and Wales.		Great Britain. Home Office	01/06/2014		Main Library

We would like to remind you that you have a debt:

## Checkin

### What information is available to staff regarding a returned item?

When an Item is returned in Alma, the staff user is advised of the next step for this item, such as item has to be re-shelved to a certain location or placed on the hold shelf if it has been requested by another patron:

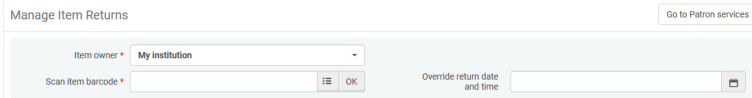
Title	Return Date	Due Date	Barcode	Loaned Date	Patron	Next Step	Owned By Library
10 minute guide to Effective leadership / by Andrew J. Dubrin.	06/13/2017	06/16/2017 21:00	AJ41400	04/28/2017	Sara Carr	Reshelve to General	Main Library

Staff are also able to view the loan and usage history of returned items.

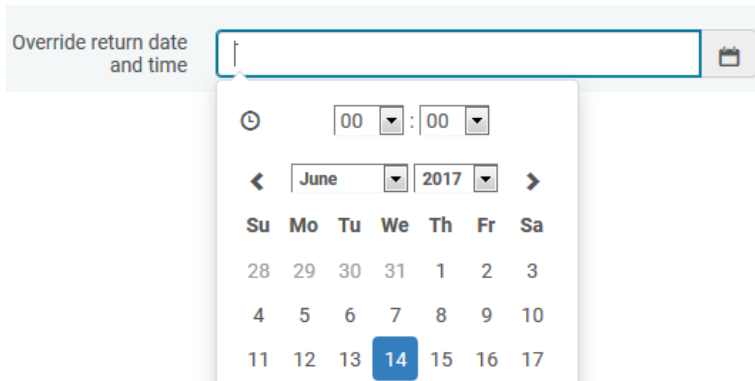
### Can returned items be back dated?

On the Manage Item Returns screen, the operator can change the due date of returning items, by clicking on the calendar

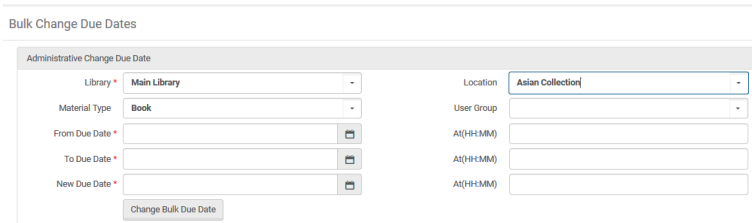
icon on the 'Override return date time' box:



The staff user can then enter the relevant date in the dialog box:



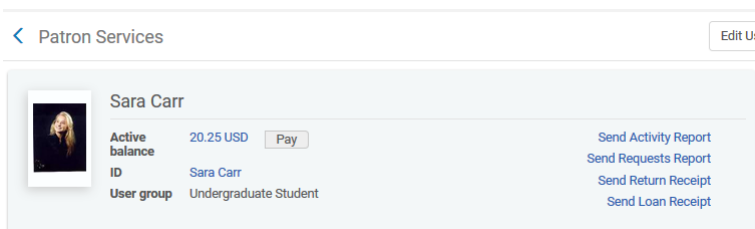
In addition, there is functionality related to bulk changes of a loan date:



Changes can be made on the level of the library and the location. Staff are prompted to enter a 'from' and 'to' due date range, as well as the new due date for all items matching the data input.

## Can return receipts be printed?

Return receipts can be sent to a specified patron for items returned to the circulation desk. These receipts can either be sent to a patron via their user preferred email, or can be sent to a configured circulation desk printer:



When circulation desks are configured in Alma, there is an option for the library to select the option "Creates Return Receipts". When this option is selected, return receipts will be automatically printed at the circulation desk printer or sent to the user's preferred email. Receipts can also be configured and customized by the institution.

Description	Main Art Library Circulation Desk
Map	
Printing Information	
Printer	
Creates return receipts	<input checked="" type="checkbox"/>
Return receipt destination	User preferred email
Creates loan receipts	<input checked="" type="checkbox"/>
Loan receipt destination	User preferred email

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## How are transit items handled?

If an item is returned to a library which is not the owning library then the staff user returning the item will get a pop up window regarding the transit of the item to the owning library.

The workflow steps can be summarized as follows:

- The staff user gets a message that it needs to be transited

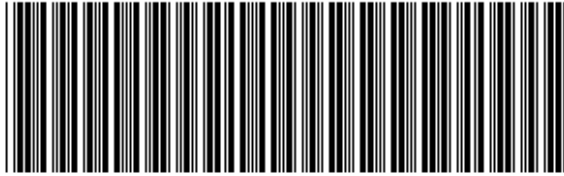
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The item's destination is: **Education Library**

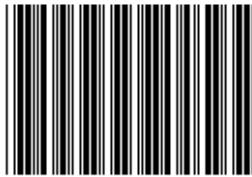
- A transit letter is printed

## Transit Letter

Print Date: 06/13/2017- 14:49



Request ID: 2962176610000121



Item Barcode: 277-20

We are transferring the item below

From: Main Library - Main Circulation Desk

To: Education Library

Transfer Date: 06/13/2017

Transfer Time: 14:49

- In the repository search the item appears as “in transit”


---

9  **Women artists / Margaret Barlow.**  
Book By Barlow, Margaret. (New York : Universe c2008.)  
Barcode: ACU645  
Update Date: 01/15/2017  
Library: Main Library  
Process type: Transit  
To Library: Main Library  
Expected Arrival Time: 02/06/2017  
Permanent Location: General  
[Other details](#)

Call Number: 613.248 '  
Call Number Type: Oth  
Status: Item not in plac  
Item Policy: Three Day  
Material Type: Book

- When the item is scanned in at the owning library it will appear as “in place”.

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1  **Women artists / Margaret Barlow.**  
Book By Barlow, Margaret. (New York : Universe c2008.)  
Barcode: ACU645  
Update Date: 01/15/2017  
Library: Main Library  
Permanent Location: General  
[Other details](#)

Call Number: 613.248 YLK  
Call Number Type: Other scheme  
**Status: Item in place**  
Item Policy: Three Day Loan  
Material Type: Book

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## Can staff view a list of in transit items?

This can be seen from the Monitor Requests and Item Processes list. The list can be filtered by Process Type 'In Transit', and further filtered by Pickup Location. Many facets are available on this screen, allowing for the list to be further filtered (e.g. by request date):

The screenshot shows a 'Resource Request Monitoring' page with a sidebar on the left containing filters for Type, Material Type, Request/Process Type, Request Date, Date Needed By, Workflow Step Status, Pickup Institution, and Owner. The main area displays two request entries:

- Entry 1:** Belgium & Luxembourg. Request ID: 3234881760000121. Request Date: 09/19/2017. Material Type: Book. Status: In Process.
- Entry 2:** 1 Peter / Daniel M. Doriani. Request ID: 3239812070000121. Request Date: 09/19/2017. Material Type: Book. Status: In Process.

## Override Options

### Can authorized staff override system blocks?

Override policies are configured by the library and only available to staff with the relevant roles and permissions. An example of the override configuration table can be seen in the following screen capture:

Description	Actions
1 The loan regular due date conflicts with booking request	Override By All
2 The renew due date conflicts with booking request	Handle Automatically
3 Item is not loanable	Override By Manager
4 Item is not renewable	Block
5 Item cannot be loaned to patron - insufficient due date	Block
6 Item does not belong to this institution	Block
7 Item is on Hold Shelf for this patron	Handle Automatically
8 Item cannot be loaned due to booking request	Block
9 Item has not been received by Acquisitions Department	Block
10 Item is requested by another patron	Override By All
11 Item renew period exceeded	Override By Manager

The following screen capture illustrates a library defined block that can be overridden by the staff operator:

The dialog box displays the message: "Cash - Limit of 25.00 USD exceeded. User has 43.00 USD." and indicates the block is "Overrideable". The 'Override' button is highlighted in blue.

The following example shows the same block that cannot be overridden by the staff operator who does not have override privileges:

User Jane Brown Is Blocked

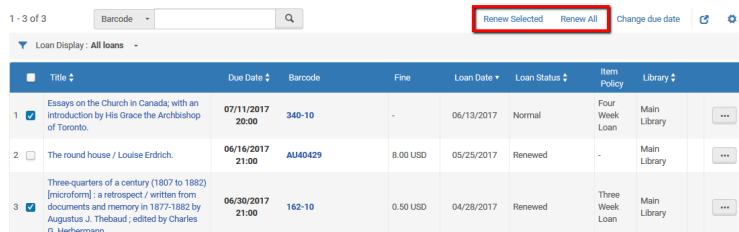
Cash - Limit of 25.00 USD exceeded. User has 43.00 USD.

Cancel OK

## Renewals

### Can a single item, selected items, or all items checked out to a patron be renewed?

Staff members (with the appropriate role) may renew all or selected items from the Manage Patron Service screen from the staff interface:



1 - 3 of 3

Barcode [input] [search]

Renew Selected Renew All Change due date [share] [refresh]

Loan Display: All loans

Title	Due Date	Barcode	Fine	Loan Date	Loan Status	Item Policy	Library	
<input checked="" type="checkbox"/> Essays on the Church in Canada, with an introduction by His Grace the Archbishop of Toronto.	07/11/2017 20:00	340-10	-	06/13/2017	Normal	Four Week Loan	Main Library	...
<input type="checkbox"/> The round house / Louise Erdrich.	06/16/2017 21:00	AU40429	8.00 USD	05/25/2017	Renewed	-	Main Library	...
<input checked="" type="checkbox"/> Three-quarters of a century (1807 to 1882) [microform] : a retrospect / written from documents and memory in 1877-1882 by Augustus J. Thebaud ; edited by Charles R. Lieberman.	06/30/2017 21:00	162-10	0.50 USD	04/28/2017	Renewed	Three Week Loan	Main Library	...

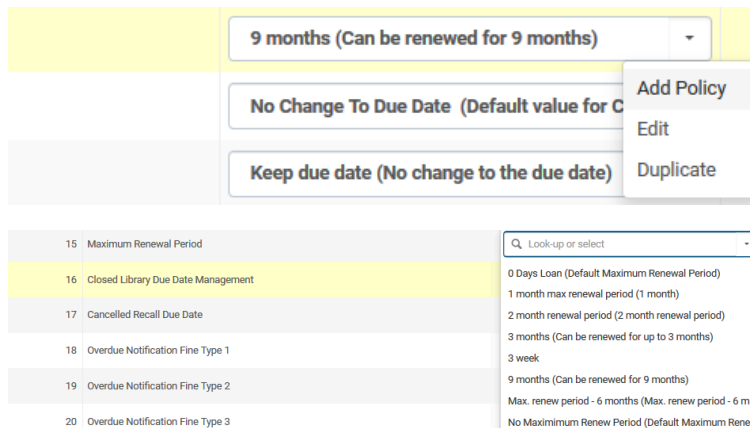
Note that Alma allows renewal of a loan even after the original due date unless the Maximum Renewal Period has been reached for the loan. For example, if the original due date is 2019/7/27 23:59 and the maximum renewal period is until 2019/7/30 23:59, borrower can renew the due date until 2019/7/30 23:59

### Are renewal parameters configurable by the library?

Alma's "terms of use" (TOU) functionality ensures that different library policies come into play when users attempt to renew resources. An example of this can be seen in the following screen capture:

14	Is Renewable	Renewable (Is item renewable)
15	Maximum Renewal Period	9 months (Can be renewed for 9 months)

Policies related to elements such as Maximum Renewal Period can be configured by the library. A new policy can be defined at any time:



9 months (Can be renewed for 9 months)

No Change To Due Date (Default value for C

Keep due date (No change to the due date)

Add Policy

Edit

Duplicate

15 Maximum Renewal Period

16 Closed Library Due Date Management

17 Cancelled Recall Due Date

18 Overdue Notification Fine Type 1

19 Overdue Notification Fine Type 2

20 Overdue Notification Fine Type 3

Look-up or select

- 0 Days Loan (Default Maximum Renewal Period)
- 1 month max renewal period (1 month)
- 2 month renewal period (2 month renewal period)
- 3 months (Can be renewed for up to 3 months)
- 3 week
- 9 months (Can be renewed for 9 months)
- Max. renew period - 6 months (Max. renew period - 6 months)
- No Maximum Renewal Period (Default Maximum Renewal Period)

## Does Alma support automatic renewals?

Alma supports manual and automatic loan renewals. Manual renewals are possible through self-check, staff users in Alma or in the Discovery layer by patrons.

Automatic loan renewal rules define the conditions under which items will be renewed by the Notifications - Send Courtesy Notices and Handle Loan Renewals job. Input parameters can be by user group and/or item owner (library). Any number of such rules may be defined.

< Automatic Rule Loan Renewal Cancel

Automatic Rule Loan Renewal Editor

Name \*

Description

Created By  Created On

Updated By  Updated On

Input Parameters + Add Parameter

Name	Operator	Value	
1 User Group	In List	Faculty, Graduate Student	...
2 Item Owner	=	Main Library	...

Output Parameters

AutoRenewal \*

The loan history link on the item (from the patron's loan list) shows the automatic renewal of an item.

Borrower [John Blacking](#)

Loan Date **03/21/2017 05:41**

Due Date **06/18/2017 19:00**

Loan status **Renewed**

Process ID **2688045240000121**

Return Date -

Booking loan? **No**

Action Date	Action	Due Date	Loan Status	Desk	Operator
1 06/11/2017 10:00	Automatic renewal	06/18/2017 19:00	Active	-	Job
2 06/06/2017 10:00	Automatic renewal	06/13/2017 20:00	Active	-	Job
3 06/01/2017 10:00	Automatic renewal	06/08/2017 21:00	Active	-	Job
4 05/27/2017 10:06	Automatic renewal	06/03/2017 14:00	Active	-	Job
5 05/22/2017 10:00	Automatic renewal	05/29/2017 20:00	Active	-	Job
6 05/17/2017 10:00	Automatic renewal	05/24/2017 21:00	Active	-	Job

The Notifications - Send Courtesy Notices and Handle Loan Renewals job runs nightly at a defined time.

7	Notifications - Send Courtesy Notices and Handle Loan Renewals	295913997...	Fulfillment	System	06/13/2017 10:00	06/13/2017 10:00	06/13/2017 10:01	Completed Successfully
---	--	--------------	-------------	--------	------------------	------------------	------------------	------------------------

This job not only handles automatic renewals, it also sends out courtesy notices to users whose items are due shortly. The fulfillment jobs configuration defines these parameters:

< Fulfillment Jobs Configuration

Borrowing Activity Report Job

Status  Active  Inactive Schedule  Run Now

Send Courtesy Notices and Handle Loan Renewals Job

Status  Active  Inactive Days before due date \*  Schedule

Send Overdue Notices Job

Status  Active  Inactive Schedule

Fines/Fees Notifications Job

Status  Active  Inactive Schedule  Run Now

Anonymization Job

Status  Active  Inactive

Anonymize item loans [Loan Anonymization Rules](#)

Anonymize fines and fees

## Can staff see the current number of renewals for each item borrowed by the patron?

This can be seen on the Manage Patron Items screen from the Actions (...) button > Loan History:

Item #	Title	Due Date	Item ID	Price	Loan Date	Status	Location	Actions
2	The round house / Louise Erdrich.	06/16/2017 21:00	AU40429	8.00 USD	05/25/2017	Renewed	Main Library	Renew
3	Three-quarters of a century (1807 to 1882) [microform] : a retrospect / written from documents and memory in 1877-1882 by Augustus J. Thebaud ; edited by Charles	06/30/2017 21:00	162-10	0.50 USD	04/28/2017	Renewed	Three Week Loan	Work Order Loan History

### < Loan Audit Trail

Title The round house / Louise Erdrich.

Description -

Borrower Sara Carr

Loan Date 05/25/2017 23:23

Due Date 06/16/2017 21:00

Loan status Renewed

Process ID 2899832830000121

Return Date -

Booking loan? No

Action Date	Action	Due Date	Loan Status	Desk	Operator
1 06/09/2017 17:01	Renewed	06/16/2017 21:00	Active	Main Circulation Desk	Jessie Ransom
2 05/25/2017 23:23	Loan	06/01/2017 21:00	Active	Main Circulation Desk	Katy Aronoff

## Ad hoc item creation

### How are temporary item records created?

A staff user at the circulation desk, (with the relevant roles and privileges) can create a temporary item record:

Scan item barcode \*   [Create Item](#)

Clicking on the 'create item' link initiates a workflow for creating the item. Mandatory fields are marked:

Resource Information	
Title *	<input type="text"/>
Author	<input type="text"/>
Author initials	<input type="text"/>
Edition	<input type="text"/>
ISBN	<input type="text"/>
LCCN	<input type="text"/>
OCLC number	<input type="text"/>
Other standard ID	<input type="text"/>
Barcode	<input type="text"/>
Remote record ID	<input type="text"/>
Publisher	<input type="text"/>
Publication date	<input type="text"/>
Place of publication	<input type="text"/>
Additional person name	<input type="text"/>
Source	<input type="text"/>
Series title number	<input type="text"/>
Call number	<input type="text"/>
Note	<input type="text"/>
Volume	<input type="text"/>

There are several options when creating the brief record:

- Suppressing the record for publishing to Discovery
- Course Restricted - Whether you want the item to be searchable in Discovery only within a Courses search scope (once you set up the appropriate Discovery search rules).
- You must define the location for the item
- You can define the loan policy that will apply (also in case an item is created for instant loan)

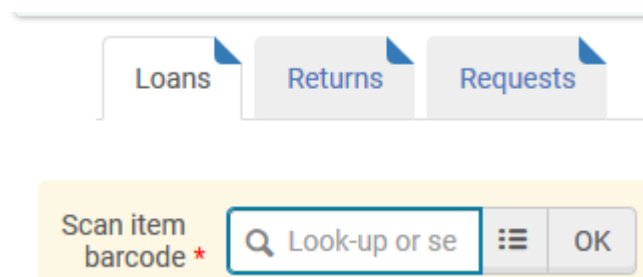
Alma will automatically assign a work order to the item, so that on its return it will be flagged for further processing. You can set up brief level rules to identify such records in the system (not only restricted to records that were created with quick cataloging but also records that were imported). Alma provides a dedicated job to retrieve such records for further processing (e.g. manual cataloging, normalization plus matching and merging with external resources, etc.)

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## Can items with no barcode or item record be loaned out?

Alma provides the possibility to search for an item directly in the repository from within a fulfillment activity, if the item is recorded with a barcode in Alma but the actual barcode label on the physical item itself is damaged or unreadable for the Circulation Desk staff.

In the Patron Services menu a staff user can enter the repository search through clicking the magnifying glass in the **Scan item barcode** field.




After submitting the search Alma staff can click on a record to choose from the queries result: The barcode of the chosen item will be registered in the loan box and the item can be loaned.


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Repository Search

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4  Sur Baudelaire, Flaubert et Morand / Marcel Proust ; édition établie par Antoine Compagnon.  
Book By Proust, Marcel, (Bruxelles : Editions Complexe c1987.) Call Number: PQ282 .P875 1987  
Barcode: 13832-10 Call Number Type: Library of Congress classification  
Library: Main Library Status: Item in place  
Permanent Location: General Item Policy: Four Week Loan  
Material Type: Book  
[Other details](#)

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5  La Peinture chez Proust et Baudelaire / S. Kadi.  
Book By Kadi, Simone. (Paris : la Pensée universelle 1973.) Call Number: PQ2631.R63 Z647  
Barcode: 18848-10 Call Number Type: Library of Congress classification  
Library: Main Library Status: Item in place  
Permanent Location: General Item Policy: Four Week Loan  
Material Type: Book  
[Other details](#)

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## Self Check circulation

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### What options are available for self-check circulation?

Alma allows for the definition of any number of Self-Check Integration Profiles.

#### SIP2 Protocol

Alma supports communication over the SIP2 protocol, which is used primarily for communication with local self-service machines. The communication is bi-directional. Since the vast majority of the SIP-based systems were built and designed without the cloud in mind, the SIP2 protocol lacks several components in order to fully support a cloud-based SaaS – namely, a unique institution ID and secure communication channel (which is supported in SIP3). Once SIP3 becomes the de-facto standard with cloud capabilities, Ex Libris will support it as well.

Alma supports the following self-check actions:

- Check out item (and canceling checkout)
- Check in item (and canceling check-in)
- Renew item
- Renew all items
- Pay fees
- Patron information
- Item information
- Patron status
- Login (enables turning the self-check machine on and off)
- Prevent requested items check in

Status (verifies that there is communication between Alma and the self-check machine).

The screenshot shows the 'Integration Profile' configuration page for 'Main Library Self-Check'. The page has a header with a back arrow, the title 'Integration Profile', and 'Cancel' and 'Save' buttons. Below the header, the main title 'Main Library Self-Check' is displayed with an information icon and a dropdown arrow. The 'Code' is 'MAINLIBSC' and the 'Integration Type' is 'Self Check'. There are three tabs: 'General Information' (selected), 'Actions', and 'Contact Info'. The 'GENERAL INFORMATION' section contains the following fields and options:

- SC Identifier:
- Error Correction:  Yes  No
- Alert:  Yes  No
- Item Transfer:  Yes  No
- SC Language:
- Retries Allowed:
- Timeout Period:
- Checkin:  Yes  No
- Checkout:  Yes  No
- Renew Policy:  Yes  No
- Fee Payments:  Yes  No
- Return Message:  Yes  No
- Extension Type:
- Item Identifier:
- Authentication Required:  Yes  No
- Close Process:  Yes  No
- Prevent Requested Items Check In:  Yes  No

At the bottom of the form is a 'Download Certificate' button.

# Offline circulation

## Does Alma support offline circulation?

Alma includes an offline circulation tool that will allow for the continuation of check-in and check-out activities when the system is available. The offline circulation tool can be installed locally and allows the data to be synced back to Alma when the network connection is back following a network failure. In addition, as Alma is hosted in the cloud, in case of local network outage there is also the option of using 3G or 4G mobile networks to access the system, enabling normal operations.

The offline circulation utility can be downloaded from [the Developers Network](#).

## How are transactions uploaded from the offline client back to Alma?

The offline circulation client stores patron barcodes and item barcodes. Loans are generated when the offline circulation files are uploaded to Alma.

To upload offline loans and returns, on the Offline Circulation List page click in the File Name field and select the .dat file containing the list of loans and returns performed during connection downtime.

Click Upload and Validate File Content.

The job is displayed in the table at the bottom of the page. Its status is displayed in the Status column.

Job Id	Status	Creator	Time Started	Time Ended	Entities Finished	Entities Failed
1 2367527620000121	Completed Successfully	ext_Impl	11/10/2016 08:32	11/10/2016 08:32	1	20
2 2017238940000121	Completed Successfully	andrewfrench	07/27/2016 20:40	07/27/2016 20:40	6	2

To view details of a job, click View for the relevant job. The Job Report page opens, detailing the number of items processed successfully and unsuccessfully.

Line	Error Message
1 2	A later action on this item happened. Barcode: 56-10 Item Title: Exultate omnes; Beata es, Virgo Maria; and, Quae est ista : three motets for 12 voices / Vincenzo Ugolini; transcribed and edited by Graham Dixon.

Total views:

21621