

Fulfillment Tips

Feel free to contribute any tips you discover that would be helpful to others.

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Primo

NOT RENEWABLE messages

Patrons looking at their loans in Primo will often see a NOT RENEWABLE message next to each loan. In most cases this will not be a permanent status. The patron can see a popup explaining the current renewal status by hovering over the NOT RENEWABLE message. Below are examples of items that are too soon to renew, recalled and claimed returned.

They can also view the Maximum renewal date. After this date loans must be returned and re-loaned to activate a new loan period.

Due: 09/22/2021, 17:00.
Pick up:Morrison Library Morrison
PS3569.A7897 T46 2013
Year: ©2013.
Loan Date: 02/03/2020
Loan Status: Renewed
Item Status: Loan
Ils Institution Name: University of
California System
Barcode: C107040463
Maximum renewal date: 02/05/2024
Item Id: 23741259810006532

 NOT
RENEWABLE

Cannot Renew This Item

Time frame when loan renewal is allowed is 7 days
before due date

The item cannot be renewed since there is a request
for this item

Loan Status: Claim returned
Item Status: Claimed Returned
Ils Institution Name: University of
California System
Barcode: C058192267
Maximum renewal date: 07/30/2025
Item Id: 23775970920006532

 NOT
RENEWABLE

Cannot Renew This Item

The item policy is no renewals

The item status is "Claim returned" and cannot be
renewed

Searching

Searching NRLF barcodes

Physical Items (1 - 2 of 2) | **b 3 123 456**

- ☐ **Small books on great subjects.**
Journal (London, W Pickering, 1842-1854.)
Barcode: **B 3 123 456**
Library: Northern Regional Library Facility
Creation Date: 04/10/2009 17:00:00 PDT
Modification Date: 07/12/2021 10:31:49 PDT
Expected Arrival Time: -
On Hold Expiration Date: -
Due Date: -
Needed By: -
Until: -
Permanent Location: NRLF (UCB Main (Gardner) Stacks)

[Other details](#)

- ☐ **Punjab Legislative Assembly debates : official report.**
Journal By Punjab (India). Legislature. Legislative Assembly, (Simla : [Controller of Printing & Stationary Punjab], [1952-1969])
Barcode: **B 3 456 123**
Library: Northern Regional Library Facility

When searching for NRLF barcodes in Alma it is helpful to add quotation marks around the barcode. Searching B 3 123 456 will return both B 3 **123** 456 and B 3 456 **123**

However, doing this for very short NRLF barcodes, even with quotation marks, will yield several results:

Physical items Barcode **"SB 1"** X Home Search

Browse Shelf Listing

Facets << Physical Items (1 - 20 of **1,001**) Contains Phrase "SB 1"

An alternative is to use Advanced Search: Physical Items - Barcode - Equals - [barcode]. This should yield a single, exact match in all cases, without the need for quotation marks. But, it does take more clicks than a simple search.

Physical items Barcode Search Home

Search in: Physical items Zone: ☒ Institution ☐ Network ☐ Community X

Barcode Equals **SB 1** + Copy

Clear form Search

Physical Items (1 - 1 of **1**) where (Barcode equals "SB 1")

☒ Institution ☐ Network ☐ Community

☐ Select All Sort by: Rank Secondary Sort by: Rank

- ☐ **A pride of prejudices.**
Book By Royster, Vermont, (New York : Knopf, 1967.)
Barcode: **SB 1**
Library: Northern Regional Library Facility
Creation Date: 04/30/2009 17:00:00 PDT
Modification Date: 07/11/2021 17:10:56 PDT
Expected Arrival Time: -
On Hold Expiration Date: -
Due Date: -
Needed By: -
Until: -
Permanent Location: NRLF (UCB Business & Economics)

[Other details](#)

Searching for proceedings in Primo

Agypptologische Tempeltagung is a series of conference proceedings, each of which has a specific title. Searching the UC Berkeley catalog for "Any field contains 'Tempeltagung'" yields four results. But limiting the search to material type "books" gives only one result, the 10th proceedings volume, which has been categorized as a book; the other three are "conference proceedings" and excluded.

Checking in paged materials in Alma (use "scan in items")

It has been discovered that you should use the "Scan in Items" function when checking in paged materials instead of the "Return Items" function.

- Click your location icon
 - Click "Always show current location" check box
 - Click "enable quick printing" check box
- Fulfillment > Scan in Items
- Automatically print slips? Yes
- Make sure "Register in-house use" is unchecked
- Proceed to scan each barcode
- If the slip does not print automatically, you can click the ellipsis and select "print slip" for each item

Emailing Receipts

Users will only get an automated receipt when:

- We click "**Done**" after checking out books to them
- We click "**Done**" after checking in returned books using the Return tab directly from their patron's account (***This sends one receipt***)
- We click "**Exit**" after checking in returned books using the Return Items function (***This sends a receipt for every book checked in***)

To view letters users have been receiving including cancelled hold notices

- Pull up the user's account
- Click their ID number from the right hand column
- Click the "Attachment" tab
 - To view the message on the letter, click the ellipsis and click view

Helpful Configurations for SLEs

1. You can bookmark quick links at the top
 - a. Fulfillment > hover and click the star next to each function (i.e. "Manage Patron Services")
 - i. Some useful ones are "Manage Patron Services", "Return Items", "Scan In Items", "Expired Hold Shelf", "Fulfillment Configuration Utility"
 - b. Click "Alma Production"
 - c. Rearrange the Quick links menu to your liking by dragging
 - d. Click "Pin Quick Links Menu"
2. You can change the configuration for the view window when doing **Physical Titles** searches so that the 2 visible options to the right of the title are **Items** and **Requests** rather than Holdings and Items - that would be more useful for circ desks. You can also customize the configuration for **Physical Items** and **All titles** searches as well
 - a. Simply click the screw icon and choose by dragging
3. To add widgets to the home page, click the "+" on the right hand corner
 - a. Simply click the ones you desire
 - i. Some useful ones are "Organization Calendar", "Discovery Search", and "Keeping up with Alma"
4. To change the column displayed on the checkout window
 - a. Change **Loan Display** to **All Loans**
 - b. Click the screw icon from the top right hand corner
 - c. Select other column headings of choice (i.e. Call Numbers)

- d. Scroll down and click **Done** (must do this or your configuration won't be saved)

Checking in AFN material (Inter-Library Lending)

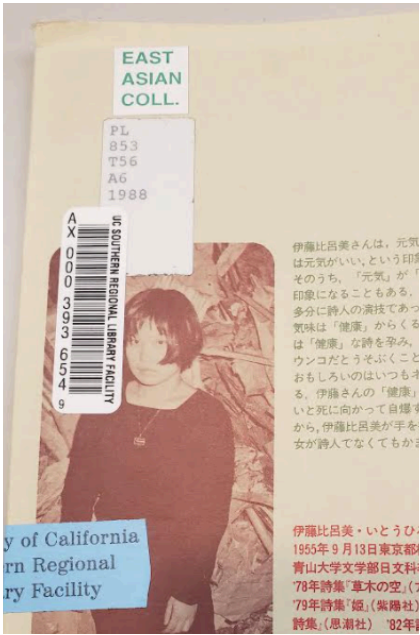
Alma allows patrons to request material from the other UC campuses and pick it up locally at UC Berkeley. At present, these items are being hand-delivered to the desk by ILL staff. When the item arrives, you will use "**Scan in Items**," check the box for "Item is from another institution," select the correct institution from the drop-down menu, scan the book barcode, and print the hold slip.

DO NOT use "Return items" to scan the barcode as it will re-route the item back to the owning location without triggering the hold.

When you check the item out to the patron, you will again need to select the correct owning institution prior to scanning the barcode. Use the drop-down menu for "Item owner" to select the appropriate campus. Leave both the transit slip and the hold slip in the book, so it's clear which institution owns the item when we check it out.

We currently use a few different models of scanners in our libraries, some of which will not scan barcodes from every other campus. If you encounter this problem, enter the barcode number manually.

Checking out books from *UC Southern Regional Library Facility (SRLF)*?

	UC Southern Regional Library Facility (SRLF) is owned by UCLA. Be sure to change the institution to UC Los Angeles before scanning the SRLF specific barcode.
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Finding usage statistics for specific physical items in Alma

If you want to get usage counts for particular physical items, when multiple copies of the title exist, *what* you get depends on *how* you got there.

For example, assume there are three copies of one title at three different libraries.

If you do an "All title" search for the title in the persistent search bar, you'll get a record with a link below the bibliographic information that shows the number of physical items available. Click the link and you'll see the three locations that have physical copies of the title.

If you want to see what the circulation numbers are, you can click the "Other details" link and you'll display a section that includes counts for "Number of loans," say, 20. But that figure is the total for all locations with these physical items in Alma.

If you want to see the statistics for the copy at only one library, you might think you can click the "Items" button in the upper right to display information for each individual item. However, this will show you holdings information, but not circ statistics.

If you want to see the statistics for each unit's copy, you must go back to the search blank and run specifically a "Physical items" search. Then you can click the "Other details" tab for each item and see both the circulation count and last loan date for each.