

Alma Circulation Activities - 6/13/2015 (Test Phase)

- Work Orders - see http://knowledge.exlibrisgroup.com/Alma/Training/Alma_Essentials/Resource_Management/05_Work_Orders (training next week)
- Circulation rules are NOT yet set up. Due dates will not be accurate.
- Note that all loan activity present in the system is OLD. It was current at the time that the data was loaded in May, but is no longer expected to be accurate. For example, you may see items that show as “item in place” that are actually currently checked out in Millennium; you may see items not in place / on loan that are currently available in Millennium. The data is not in sync and will remain out of date until next June.

Login to Alma:

1. Checkout an item
2. Check the item back in
3. Search for an item using the quicksearch bar at the top, and mark an item as missing (use “Toggle Missing Status”). Remove the missing status.
4. Edit your patron record to update your address.
5. Look at the full user screen for your user account. Use “Open for update”. Say “No” to the popup asking if you would like to prevent these fields from being overridden by the next patron load.
6. Place a hold request using your account on *Harry Potter and the Order of the Phoenix* (the Loaned copy in TCC).
7. Place a hold request using your account on any item that is currently on the shelf. Override the loan policy to place an on-shelf hold.
8. Look at the active hold shelf. Sort by requester name.