Contents

SECTION 1: LOGGING INTO ALMA ........................................................................................................... 2
SECTION 1: SEARCHING ALMA MENU AND SETTING FAVORITES ......................................................... 4
SECTION 2: CHARGING ITEMS .................................................................................................................. 6
SECTION 3: ITEM RENEWALS ................................................................................................................ 10
SECTION 4: RETURNING ITEMS .............................................................................................................. 12
SECTION 5: PATRON SEARCH ................................................................................................................ 18
SECTION 6: ADDING NOTES .................................................................................................................... 19
SECTION 8: PLACING REQUESTS AND HOLDS ..................................................................................... 24
SECTION 9: CREATING USER CARDS ..................................................................................................... 28
SECTION 10: ADDING FINES ................................................................................................................... 30
SECTION 11: ALMA DELETION/WITHDRAWAL PROCEDURE .................................................................. 33
SECTION 12: LOST-DELETED ITEMS ..................................................................................................... 34
SECTION 13: REMOVING FINES ............................................................................................................. 35
SECTION 14: LOST/Paid .......................................................................................................................... 38
SECTION 15: RESERVES ......................................................................................................................... 48
SECTION 16: ADDING COLLECTION ITEM TO READING LISTS ............................................................. 57
SECTION 17: CHANGE ITEM INFORMATION .......................................................................................... 60
SECTION 18: MANAGING SETS- ITEMIZED ............................................................................................ 61
SECTION 19: MANAGING SETS- LOGICAL ............................................................................................ 62
SECTION 20: CHECKING PERIODICALS FOR MISSED DELETIONS ..................................................... 64
SECTION 21: PERSONALIZING ALMA .................................................................................................... 65

ANY QUESTIONS THAT YOU HAVE CAN BE ANSWERED BY THE MANAGERS. IF YOUR CIRC MANAGER IS NOT AVAILABLE CALL ONE OF THE OTHER CAMPUS MANAGERS. THEY WILL BE HAPPY TO HELP.
SECTION 1: LOGGING INTO ALMA

1. Browser Method

Pull up a browser and enter this address:

http://lib-serv.tccd.edu/alma

http://library.tccd.edu/alma

Note: browsers Chrome and Firefox work best

Type in your assigned username and password and click Login.

2. Shortcut method

If you have a desktop shortcut, just double click it, and then login as usual.
SECTION 1: LOGGING INTO ALMA

NOTE: Be sure your current location is accurate.

After you have saved your location, it will look like this.

If your location is not correct, please see management.
SECTION 1: SEARCHING ALMA MENU AND SETTING FAVORITES

NOTE: Click on the >> Arrows by the main menu to search for a menu link.

Insert the desired action into the search field and hit enter.

Then choose the correct link and you will be taken to that page.

**Note:** Click the star next to the link in order to add it to favorites.
SECTION 1: SEARCHING ALMA MENU AND SETTING FAVORITES

Once you selected all of the items, you would like as "favorites" your menu will look like this
SECTION 2: CHARGING ITEMS

Select “Manage Patron Services” to open the patron search bar.

Scan the patron’s TCC ID with the barcode reader to begin.

You may also type the number in manually to pull up a student’s account.

This will pull up the student account. Put the cursor in the “Scan item barcode” field.
SECTION 2: CHARGING ITEMS

Scan in the item barcodes.

Make sure that each item appears in the field below and that the due date is correct.

If necessary to change the date, click the checkbox next to the left of the title. Then click the “Change due date” button. You will get this screen:
SECTION 2: CHARGING ITEMS

Either enter the date or use the calendar to select the new date, then click “Change due date.”
SECTION 3: ITEM RENEWALS

Pull up the patron’s record. Under loan display click to show the drop-down menu. Choose all loans.

This shows all items the patron currently has checked out. Click in the box next to the title you wish to renew.
SECTION 3: ITEM RENEWALS

Click on the ellipsis button to pull up the menu. Click on “Renew”. The item will now show the new due date.

A renewal is only allowed if the item has no existing hold/request. Holds cannot be overridden in ALMA, even by a manager. The workaround is to remove the hold, do what’s needed, then replace the hold for the student; however this is not recommended as except in emergency situations.
SECTION 4: RETURNING ITEMS

From the main menu or from your quick links, choose Return Items.

Put the cursor in the "Scan Item Barcode" field.

Scan in the items (or type the barcodes if necessary). Twice for each item.

Make sure that each item appears in the field below.
SECTION 4: RETURNING ITEMS

LOOK FOR THE FOLLOWING PROBLEMS.

1. Lost item returned

If you see this, click on the Patron name to go to the Patron account screen. You will see this pop-up note. Click OK.

If the item is lost and needs to go to another campus please send an email informing that campus manager and their Circ. group that the fine was forgiven along with the name and the id number of the student.

You will see the Patron account screen. Either do a screenshot or write down the patron’s name and student ID number. Place this information with the lost item(s) and give to the manager,
SECTION 4: RETURNING ITEMS

2. Fines

User [Redacted] Is Blocked

- Patrons card has expired [Overrideable]
- Cash - Limit of 10.00 USD exceeded. User has 100.00 USD. [Overrideable]
- Overdue - Limit of 0.0 exceeded. User has 1. [Overrideable]

Click OK, and then follow the steps above to record patron information.
SECTION 4: RETURNING ITEMS

3. **Fulfillment notes.**

Fulfillment notes will contain information about the item, such as number of pieces. Be sure to count before you click OK.

Fulfillment notes also contains information about damaged items. **Read the screen** carefully before clicking ok.
SECTION 4: RETURNING ITEMS

Transit Pop-up

The print slip (see example below) is sent to the Circulation outlook email. Please print it and place it with item to be returned.

Transit Letter 05/21/2018

Print Date: 05/21/2018 - 16:10:17 CDT

Request ID: 237707411630001641

Item Barcode: 3500100089131

We are transferring the item below:

From: South - Jenkins Garrett Library - South Circulation Desk
To: Trinity River - Trinity River Library
Transfer Date: 05/21/2018
Material Type: Book

Statistics for people who (think they) hate statistics / By: Salkind, Neil J.,

Owning Library: Trinity River - Trinity River Library
SECTION 5: PATRON SEARCH

From your main menu or quick links choose “Manage Patron Services”.

Enter the patron’s ID number or name in the search field and click Go.

This will pull up the patron’s account.
SECTION 6: ADDING NOTES

1. Patron Notes

Pull up the patron’s record. Click on the patron’s ID number.

This brings up the patron’s user details. Notice the tabs, choose the tab titled “Notes”.

From this tab you can view already existing notes and add a new note. To add a new note click “Add Note”.

This is the Note input field. Insert text into the note box. Please include your initials, campus, and date. Choose the appropriate note type.

In Alma you can allow the patron to view any notes placed on his/her account. Simply check the box called “User Viewable”. If you do NOT want the note viewable please make sure the box is unchecked.
SECTION 6: ADDING NOTES

The note is complete. Choose “Add and Close”.

2. Patron Pop-up Notes

Pull up patron record. Click on the patron Id number. Choose the “Blocks” tab.
SECTION 6: ADDING NOTES

Click “Add Block.”

Click in the note box and type text. Please include your campus, initials, and the date. Click “Add and Close”.

3. Item Notes
SECTION 7: REPOSITORY QUICK SEARCH

For the quickest way to search for physical items within the library’s collection, enter a barcode, title, keyword, etc. into the search field and click the magnifying glass to get results.

Searching by “Physical Titles” allows you to bring up every item record. Once you have searched for your item a list will appear. Click on the Items button to select the specific item you are looking for.

After clicking on items, each item will appear sorted by barcode. To choose a specific item record, click on the hyperlinked barcode.
SECTION 7: REPOSITORY QUICK SEARCH

Note the drop-down menu reading “keywords” you can change this to help refine your search.
SECTION 8: PLACING REQUESTS AND HOLDS

1. Placing Requests

Search for the desired item in the keyword search field. This search allows you to search by barcode, title, keyword, etc.

Scroll down to the desired book and click “Request”.

After clicking “Request” you will see this screen. Choose the drop-down menu under Request Type and choose “Patron physical item request”.

[Image of search screen]

[Image of request screen]
SECTION 8: PLACING REQUESTS AND HOLDS

Enter the patron’s ID number into the “Requester” field and WAIT for it to populate with the patron’s information in all caps, scroll down until the patron’s name is highlighted and click.

Under the “Pickup At” field use the drop-down menu to select the campus where the patron would like to pick up the items.
SECTION 8: PLACING REQUESTS AND HOLDS

Choose Submit
SECTION 8: PLACING REQUESTS AND HOLDS

You should see the screen below. The request was successful. Please let the patron know that when the item is received at the receiving campus they will receive an email from TCC.

2. Placing Holds

Holds are item requests where the item status is “Item not in place”. The procedure is the same as placing requests.
SECTION 9: CREATING USER CARDS

TYPE IN ALL CAPS

1. Creating a Courtesy Card

We create a courtesy card for both community patrons and TexShare members of other institutions. Make sure to check Alma/Colleague (Datatel) for an existing record for the user!

From your main menu or quick links go to “Manage Patron Services”. On the far right click “Register New User”.

Enter information into the field in ALL CAPS. Enter data in the highlighted fields only.

Expiration date should be the start of the next semester.

User password formula. Your campus + user primary identifier. EX: Trcc0001310

From this drop down box choose Courtesy Card.

The user’s primary identifier is inserted for you automatically. Use Colleague ID# when available.

Purge date should be a year to the day of the expiration date.
Enter information continued...

Choose update user to save new user to Alma.
SECTION 10: ADDING FINES

To add fines open Analytics and run the correct report by choosing “Open”.

Choose dates and your campus.
SECTION 10: ADDING FINES

Here is what your report will look like within Analytics.

Export the report into Excel by choosing “Export” and “Excel 2007+”
SECTION 10: ADDING FINES

Finish the report by adding all fines for a student to one line and email to Business Services.
SECTION 11: ALMA DELETION/WITHDRAWAL PROCEDURE

Tabled for Policy Manual

1. Open a new Excel spreadsheet. Type “Barcodes” in the first cell and scan in the barcodes of the items you want to delete into the first column (one barcode per line).

2. Email the completed file to jana.murphy@tccd.edu. Jana will use your barcodes to create an itemized set. She will then generate a detailed spreadsheet of the items in the set and will email the spreadsheet back to you.

3. Verify that the items on the spreadsheet match your desired deletions.

4. Email the spreadsheet to the person authorized to sign deletes for your campus library. Your library should keep a copy of the spreadsheet for your records.

5. The person authorized to sign deletes will formally request the deletion by emailing the spreadsheet to jana.murphy@tccd.edu

6. After you receive notification that the items have been successfully deleted discard the items that you have withdrawn.
   • After the items have been officially deleted, remove the barcode and stamp “Discard” on the title and other pages and on the edge if there is enough room.

7. Non-collection items that were previously on reserve and now being added to permanent collection must be first reported for deletion through the established procedure to facilitate accurate accounting and reporting.

District Library policy allows for the distribution of withdrawn library materials to other TCCD units. Criteria for doing so are: the materials must be for appropriate use (consistent with district policy) within the district; must be requested in writing to the Library Director; and must be approved, at a minimum, by a department head. All other withdrawn library materials must be placed in recycling bins with precautions taken to ensure that neither library staff nor any other individual remove items from the recycling bin. The Library Director will review transfer requests and if appropriate, will authorize the transfer of withdrawn materials.
SECTION 12: LOST-DELETED ITEMS

Go to the loan on the patron’s record and choose from action buttons the “Delete Loan” function. This removes the item from the fine and places the item in missing status.

Add a note and include the reason for the loan deletion and the title and barcode of the item to the patron’s account. For note type choose “Circulation”. Copy your note from the patron record.

Make sure that the items barcode makes it on a deletions list, see manager for questions.
SECTION 13: REMOVING FINES

Returning lost items looks like this:

After Analytics updates this student would show up on the remove report. Find needed report and click open

Choose your campus and the previous days date and today’s date.
SECTION 13: REMOVING FINES

This is what the report looks like within Analytics. Now we need to export it to Excel.

Choose the “Export” link and then choose the Excel 2007+. The report should open up in a new excel spreadsheet.
SECTION 13: REMOVING FINES

Combine amounts if a student has more than one item. Fill in the Colleague Invoice Number for the Fine. Check and make sure the amount corresponds to the report. Email your Business Services group.

When items that were lost are returned to another campus please be sure to include an email to the campus the item belongs to.
SECTION 14: LOST/PAID

1. Select Manage Patrons Services

2. Type in patron Identification number

Once you select, a pop-up window will appear with a block. Select ok.

Select “Loan Display” and choose “All Loans” in drop menu.
Choose the item “Paid” for, then go to Action (three dots to the right). In the drop down menu, select “Delete Loan”.

Once the loan is detached from the patron, the item is placed in “Missing” status, instead of “Lost”.

Go back to patron screen as seen below. Click on Active balance dollar amount

The fines/fees page will open. Choose item that has been paid for, then select “Waive” from drop down menu
When you enter “waive” the below window will open

Under “waiving reasons” choose “other”
In “comment” section, place note describing reason waiving, patron ID# and item information. Place your initials and campus. Copy this note to be pasted on patron note and item note.

Hit “Save”
Dialog box will appear to confirm your actions. Hit “confirm”

Hit “Done.” Go back to “manage patron services” and click on Patron ID #
Select note field.

Choose “add” note. Select “circulation” under “type” drop down and then choose “Add and Close”
Hit “Done”

Go to Physical Items and type in item barcode. Click on hyperlinked barcode.
Click ‘note” tab
Paste same note copied into “fulfillment note” and hit “save”

A message will appear that a successful update has been made, as shown in dialog box below
SECTION 15: RESERVES

To create a new course, choose “Courses” from your main menu or quick link.

Once the screen has opened, please choose the “Add Course” option.
SECTION 15: RESERVES

Fill out all fields marked with stars.

Select previous day to make active immediately.

Fill out the fields marked with starts with the information needed. Note that the end date should be far in the future; we have chosen 2025.

Note that you can add more than one instructor to a course after clicking on the “Instructors tab” which is starred above. Please do so to create a course that multiple instructors teach.

Course will be shown as “active” once saved. Be sure to click “save”!
Once the course is created, you can search for it by using the search bar under “Course Code”.

Once your course comes up, use the Action button to pull up your possible actions. Choose “Reading List”.

SECTION 15: RESERVES
Click on the “Add Reading List” button. Fill in the Code Field, using the formula “Campus initials + Course Letters and numbers + Faculty name (if known)” (EX: SO HIST 1301 SMITH). Fill in the name of the course (can be found in WebAdvisor under Undergraduate course description), Due Back Date of 12/31/2025, and change Status to Complete. The reading list will now show up under the Course.

To add an item to a reading list, click on the action button, and click “Work On”.

When the reading list opens, click “Add Citation”, and for a new item, choose “Add Brief”. (New item has never been catalogued before)
A box will pop-up, and for most items you will choose “Physical Book”.

- Physical Book
- Physical Article
- Electronic Book
- Electronic Article
Fill out the starred Fields. Make sure all fields are entered correctly before hitting save. Once you hit save, the record is created and you will not be able to make any edits.
Once the record is created, click the action button and choose “Item”.

Click the Action button and choose “Edit” from the action options.

Fill in the Replacement Cost and Pieces fields. Click Save.
If you have successfully updated the cost and pieces in the record, you should see this message. If you have questions, see your manager.

Return to item record and click “Set Complete.” (This allows the item to be searchable in Primo.) Once you hit “Set Complete” the Request Status field will be updated to say Complete.
DUPLICATING ITEMS: If you are adding more than one copy of the exact book (same ISBN) to the system, we can duplicate the record from the original item record by clicking the Action menu and choosing “Duplicate”.

Add in a new barcode and notate which copy number (ex. 2, 3, 4). The rest of the information should auto fill.
SECTION 16: ADDING COLLECTION ITEM TO READING LISTS

In the Fulfillment menu, click “Scan In Items”.

Click the Change Item Information tab. In “Change Type” drop-down menu choose Temporary. In “Location” drop down, choose the temporary location (Circulation Desk/Reserves). From the “Item Policy” drop-down menu, choose the reserve checkout period.
Next, choose the reading list by typing the exact title of your reading list, or by searching through the “Reading Lists Task List” (3-lined button next Reading List Field).

If searching through “Reading List Task List,” choose reading list by clicking on it.
Next, Scan item barcode and hit enter.

You must still go into the reading list and change the status from Prepared to Complete.

<table>
<thead>
<tr>
<th>Code</th>
<th>TR HIST 2381 Blank</th>
<th>Status</th>
<th>Being Prepared</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>African American History</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Due Back Date</td>
<td>12/31/2020</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Owners</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
SECTION 17: CHANGE ITEM INFORMATION

Changing locations in ALMA is done through the Change Item Information. To change items between temporary locations choose from the drop down menus and input the barcodes. You can do with multiple barcodes. You can also put in a new barcode for an existing item. This is sometime necessary due to damage to the old barcode, replacing destroyed book cover/DVD cases, attempted theft, etc.
To create the set, choose add set. Choose what kind of set you want to create. A logical set is an “active” set, which items added to the collection appear on your set. An Itemized set is a simple barcode list of items that can be saved as a group.
Your set name should begin with your Campus Initials + subject matter.

To add items to your set, you can do it two ways. You can upload an excel spreadsheet that has the barcodes in a vertical column. You can also add items by creating the set and adding items to it by searching.

SECTION 19: MANAGING SETS- LOGICAL

Logical sets are created differently. They are based on a specific set of search results. For example if I want a running title list of books in our district that are in Spanish. We can do an advance search specifying the criteria and save it as a set. This would mean as the district purchases new titles, if they fulfill the search requirements they are automatically added to the set.
Once you have your results you need to save your query.

Now you create your set with the results already attached. As additional titles are added to the collection they appear on your set.
Creating a set of issues based on location and receiving can give us a list of items that possibly were missed in our normal deletions procedure. To check your campus, run the above set adjusting for campus, location, and dates.

Once done, you would want to export it to Excel. The page icon with an arrow pointing to the right is the export function.

**Physical Items (21 - 40 of 4,020)**
where (Current library equals (Southeast - Southeast Campus Library)) AND Current location equals ((Southeast - Southeast Campus Library : SE Periodicals)) AND Material type equals "Issue" AND Tag Suppressed (Title) equals "No" AND Receiving date before "2015-12-01"
SECTION 21: PERSONALIZING ALMA

IF you have your own log in for ALMA you can personalize your search results and the order of how actions appear. To do this look for the gear icon.

I’ve also found that rearranging the available action buttons is useful in search results and pick up items.

****DO NOT CHANGE SETTINGS ON THE GENERAL CIRC LOGINS****