

The background of the slide shows the spines of several books in a library. The books are arranged vertically, and their spines are slightly blurred, creating a sense of depth. The text on the spines is faint and mostly illegible, but some words like 'first', 'legal', 'said', and 'open' are visible. The overall lighting is soft, highlighting the texture of the book covers.

# Fulfillment and GIL Express: Reviewing the Fundamentals

GIL Users Group Meeting

May 17, 2023

Mary Poland and Viki Timian

University of Georgia Libraries

# Fulfillment in Alma

# Fulfillment Basics

The screenshot displays the Alma Fulfillment interface. At the top, there is a navigation bar with a search bar containing 'Physical titles' and 'Barcode', and a user profile section for 'Main Library - Main Library Circulation'. The left sidebar contains navigation options for Alma PRODUCTION, Fulfillment, Admin, and Analytics. The main content area is divided into several sections:

- Checkout/Checkin:** Manage Patron Services, Return Items.
- Resource Requests:** Pick From Shelf, Scan In Items, Expired Hold Shelf, Active Hold Shelf, Manage In Process Items, Deliver Digital Documents, Approval Requests List, Monitor Requests & Item Processes.
- Course Reserves:** Courses, Reading Lists, Citations.
- Advanced Tools - Loans:** Fulfillment Configuration Utility, Offline Circulation.
- Advanced Tools - Requests:** Items Requiring Action.
- Advanced Tools - Reading Lists:** Citation Alternate Suggestions, Bulk Citation Copyright Recalculate, Process and Enrich Citations.
- Advanced Tools - General:** Create Fines And Fees Report, Create Fulfillment Sets.

The main content area features an 'Organization Calendar' for 'Main Library' showing a weekly view for May 11-14. Below the calendar is a 'Discovery Search' bar. The bottom right section displays a 'Fulfillment - campus branch loans comparison' table with a 2-month widget.

Library Name	Material Type	Current Month	Previous Month
		Loans (In House + Not In House)	Loans (In House + Not In House)
Art Library	Book	166	139
	Journal	1	2
	Visual material		1
Curriculum Materials Library	Book	41	206
	Visual material	5	3
Miller Learning Center	Book	223	625

# Working in Alma

- The functions you have access to in Alma are based on your User Role(s).
- You need the role(s) for each location where you will be working.
- These roles are assigned by the Alma Administrator for your library/department.

					Reserves	
9	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Circulation Desk Manager	Fulfillment	Gwinnett Campus	Gwinnett Desk
10	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Circulation Desk Manager	Fulfillment	Griffin Georgia Experiment Station	Griffin Circulation
11	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Circulation Desk Operator	Fulfillment	Main Library	Main Library Circulation, Main Library Reserves
12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Circulation Desk Operator	Fulfillment	Science Library	Science Library Circulation

# Managing Patron Accounts

Manage Patron Services | Pick From Shelf | Active Hold Shelf | Scan In Items | Expired Hold Shelf

Patron Identification Go to Return Items Register New User

Find user in other institution

Scan patron's ID or search for patron \*

Use proxy

# Finding Patrons

The screenshot displays the Alma library system interface. At the top, there is a navigation bar with a search icon, a dropdown menu set to 'Users', and a search input field containing 'Email'. To the right of the search bar, it says 'Main Library - Main Library Circulation'. Below the navigation bar, there is a sidebar on the left with icons for 'Alma PRODUCTION', 'Fulfillment', 'Admin', and 'Analytics'. The main content area is titled 'Patron Identification' and features a search input field with a magnifying glass icon and the text 'Search...'. Below the search field, there are several search criteria listed with circular refresh icons: 'Email', 'Last name', 'User general information', and 'Phone'. A 'Go' button is located to the right of the 'Phone' criterion. At the bottom of the search criteria list, there is a section with 'All', 'Email', 'First name', 'Identifiers', 'Job category', 'Last name', 'Middle name', 'Phone', 'Primary identifier', and 'User general information'. On the right side of the main content area, there are two buttons: 'Go to Return Items' and 'Register New User'.

# Using Advanced Search for Patrons

The screenshot displays the Alma Advanced Search interface for Patrons. The top navigation bar includes the Alma logo, a search icon, and dropdown menus for 'Users' and 'Email'. The right side of the header shows 'Main Library - Main Library Circulation' with a dropdown arrow. A left-hand navigation sidebar contains icons and labels for 'Alma PRODUCTION', 'Fulfillment', 'Admin', and 'Analytics'. The main search area is titled 'Search in: Users' and features a search input field with a placeholder 'Look-up or select', a dropdown arrow, and a 'Search' button. Below the input field is a list of search criteria: First name, Birth date, Campus, Create date, Email, Expiration date, Fine/Fee total sum, First name, Has block type, Has identifier type, Has note type, Identifiers, Job category, Last activity date, and Last name. To the right of the search input is a dropdown menu set to 'Equals', a 'Clear form' button, and a 'Search' button. The right side of the interface contains two buttons: 'Go to Return Items' and 'Register New User'.

# User Information

[User Details](#)

[Toggle Account Type](#) [Open For Update](#) [Cancel](#) [Save](#)

[General Information](#) [Contact Information](#) [Identifiers](#) [Notes](#) [Blocks](#) [Fines/Fees](#) [Statistics](#) [Attachments](#) [Proxy For](#) [History](#)

User Information

First name *	<input type="text" value="Mary"/>	Middle name	<input type="text" value="W"/>
Last name *	<input type="text" value="Poland"/>	Preferred first name	<input type="text"/>
Preferred middle name	<input type="text"/>	Preferred last name	<input type="text"/>
Primary identifier *	<input type="text" value="REDACTED"/>	Title	<input type="text"/>
PIN number	<input type="text"/> <a href="#">Generate</a>	Job category	<input type="text" value="Please select a value"/>
Job description	<input type="text"/>	Gender	<input type="text"/>
User group *	<input type="text" value="Faculty"/>	Campus	<input type="text"/>
Website URL	<input type="text"/>	Preferred language	<input type="text" value="English"/>

**Poland, Mary**

ID

Record type  
Public

**Account Type**  
External

User group  
Faculty

Identity Service  
Not Used

Owner  
SIS

# Finding Titles

The screenshot displays the Alma library system interface. At the top, there is a navigation bar with several tabs: 'Most Visited', 'Getting Started', 'Release Notes - Ex Libr...', 'UGA Elements - Home', 'GALILEO Interconnect...', and 'Welcome to Traf-Sy'. Below this is a dark blue sidebar with navigation options: 'Alma PRODUCTION', 'Fulfillment', 'Admin', and 'Analytics'. The main content area features a search bar with a magnifying glass icon and a dropdown menu currently open to 'Physical titles'. The dropdown menu lists various title types: 'All titles', 'Physical titles', 'Physical holdings', 'Physical items', 'Electronic titles', 'Electronic portfolios', 'Electronic collection', 'Digital titles', 'Digital files', and 'Collection'. To the right of the search bar, there are tabs for 'Active Hold Shelf', 'Scan In Items', and 'Expired Hold Shelf'. Below these tabs, the date '05/15/2023' is displayed. Further down, there are three buttons: 'Analytics', 'Pick From Shelf Fulfillment', and 'Monitor Requi Fulfillment'. On the far right, there is an 'Organizatio' section with a 'Select Libran' dropdown menu showing 'Main Libran' selected, and a date/time display for 'May 15 Monday' with the time '07:30 - 23:5'.

# More Information on Finding Titles

The screenshot displays the Alma library system interface. On the left is a dark sidebar with navigation icons for Alma PRODUCTION, Fulfillment, Admin, Analytics, and Show MDE. The main content area features a search bar at the top with a magnifying glass icon and a dropdown menu currently set to "Physical titles". Below the search bar, there are sections for "Manage Patron Services", "Welcome, P...", "Recent Pa...", and "Tasks". The "Tasks" section lists various items with counts: 24 Other Reques, 121 DARA Recom, 9651 Electronic Re, 283 Reading Lists, and 237 Citations. A dropdown menu is open, listing search criteria such as Title, Barcode, Permanent call number, Creator, Keywords, Acquisition Note, Action note - authorization, Action note - note, Barcode, Call number prefix, Call Number Type, Control number (Holdings), Creator, DOI - Digital Object Identifier, Edition, Fulfillment Note, Government Document Number, Holdings note, Holdings PID, Internal note 1, ISBN, and ISSN. A red box highlights the magnifying glass icon in the search bar. Below the search bar, there are search filters: "Search in: Physical titles", "Zone: Institution" (selected), "Network", and "Community". Below these are two dropdown menus: "Title: Accompanying Material" and "Contains Keywords".

# Tips for Alma Fulfillment Borrowing

- Click on the “Done” button when you finish checking items out. Patrons will not receive an email receipt unless you do this.
- When searching for a patron by name, you have to first select their name from the dropdown menu before clicking on the “Go” button or you will get a “Patron Not Found” error.
- Patrons receive emailed receipts when they check out books, when books are on hold, or when changes occur on their account. This is particularly important to remember for recalled or hold items because the person who placed the hold or recall will get an immediate notification that the book is ready for pickup.

# Hold Shelf Processing Configurations

- Hold Shelf Processing – YES - The item not yet ready for the hold shelf and is designated for hold shelf processing for a specific time before the hold is activated. After the designated time, the hold is activated and the On Hold Shelf Letter is sent to patron.
- Hold Shelf Processing – NO – Hold is activated immediately when the book barcode is scanned. Item 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

# Hold Shelf Configurations in Alma

Configuring: Main Library ▾

- Alma PRODUCTION
- Discovery
- Fulfillment
- General

**Library Management**

- Library Details
- Opening Hours
- Relationships
- Circulation Desks

**Locations**

- Physical Locations

**Physical Fulfillment**

- Fulfillment Units
- Terms of Use and Policies
- Item Policy
- Advanced Policy Configuration

Alma PRODUCTION

- Discovery
- Fulfillment
- General

## Circulation Desk - General Information

General Details | Physical Locations | Work Order Types | Operators | Automatic Printing

General Details

Name \*

Primary

Reading room desk

Picks from shelf

Supports personal delivery

Supports registering new users

Supports overriding return date

Time to reshelve (hours)

Delay for hold notification (minutes)

Additional Information

Description

Creates return receipts

Creates loan receipts

Loan receipt destination

Hold Shelf Information

Has hold shelf

Hold shelf sorting

Maximum time on hold shelf (Days)

Has hold shelf processing

Notify patron of canceling expired hold

Digitization Department

Supports Digitization

Work Time(days)

Payment Information

# List of Borrowed Items

Sometimes a patron may ask for a list of the books they have checked out. Click on the “Tools” button on the right above the list of books on loan. You can download the list into Excel and print it out.

Loans Returns Requests Network Activity

Item owner \* My institution Scan item barcode \* [input] [OK] Create Item

1 - 5 of 5 Search Renew Selected Renew All Change Due Date [Tools]

Loan Display : All loans

	Title	Due Date	Barcode	Loan Date	Loan Status	Author	Library	Call Number	
1	Pre-suasion : a revolutionary way to influence and persuade / Robert Cialdini.	11/14/2019 11:59:00 PM EST	32108057992532	11/14/2018	Normal	Cialdini, Robert B.,	Main Library	BF774 .C56 2016	...
2	Debt : the first 5,000 years / David Graeber.	12/11/2019 11:59:00 PM EST	32108048141603	12/11/2018	Normal	Graeber, David.	Main Library	HG3701 .G73 2011	...
3	Butter beans to blackberries : recipes from the southern garden / Ronni	04/14/2020 11:59:00 PM EST	32108030335221	04/15/2019	Normal	Lundy, Ronni.	Science Library	TX715.2 .S68 L8497 1999	...

Excel (current view)  
Excel (all fields)

# Return vs. Scan In

- Use Return if checking in items that need to be backdated and to see patron information.

Manage Item Returns Go to Patron services

---

Item owner \*

Scan item barcode \*

Override return date and time

- Scan In is used to move items from one workflow process to another. For example, changing an item to a temporary location like Course Reserves. It can also be used to create On-the-Fly records and to return items.

Scan In Items

---

Change Type

Location

Call Number Type

Reading List

New Barcode

Scan item barcode \*

Check Requests

Due Back

Item Policy

Call Number

# Creating On-the-Fly Records

[< Scan In Items](#)

[Manage In Pr](#)

Scan in Items

Change Item Information

Automatically print slip  Yes  No

Register in-house use

Item from another institution

Work Order Type

Scan item barcode \*

Scan request ID

Create Item

# On-the-Fly Record Information

The screenshot shows a modal dialog box titled "Choose Holdings Type" overlaid on a library cataloging interface. The dialog contains the following elements:

- A label "Choose Holdings Type \*" followed by two radio buttons: "Existing" (unselected) and "New" (selected).
- A label "Citation Type" followed by a dropdown menu with "Book" selected.
- At the bottom right, there are two buttons: "Cancel" and "Choose".

The background interface is partially visible, showing a sidebar with "Quick Cataloging" and "Pick From Shelf" options, and a main area with a "Save" button.

## Quick Cataloging

### Placement of new record

Placement of new record  Network  Institution

### Resource Information

Title \*

Author  Author initials

# More OTF Record Information

Course Restricted

Suppress from  
Discovery

## Item Information

Location \* **Main Library: 99Main On the Fly (Main\_OTF)** ▼

Barcode \*

Material Type  ▼

Item policy  ▼

Public note

# Monitor Requests & Item Processes

Manage Patron Services | Pick From Shelf | Active Hold Shelf | Scan In Items | Expired Hold Shelf

Alma PRODUCTION

Fulfillment

Admin

Analytics

Show MDE

Facets

- Pickup From Shelf (49)
- On Hold Shelf (209)
- Transit Item (1474)
- Undefined (93)
- In Process (12673)

**Request/Process Type**

- Acquisition te... (1205)
- Booking request (4)
- General hold req... (23)
- Google Book... (10108)
- route to ILS Mana... (2)
- digitization process (2)
- MLC Tech assess ... (6)
- Move temporarily (1)
- route to Music C... (69)
- Patron physical ... (410)
- Patron digitization... (2)
- route to Serials Ca... (9)
- Transit For Re... (1376)
- BindingPreser... (1281)
- Less

**Request Date**

- Today (307)
- Yesterday (216)
- Up to three day... (190)
- Up to a week ago (56)
- Up to a month ... (3576)
- Older (10153)

Resource Request Monitoring (1 - 20 of 14,498)

Activity Status : Active | Include Pending Resource Sharing Requests : Yes | Clear all

1  **Book of Hours (use of Rome) In Latin, illuminated manuscript on parchment** [Print Slip](#) [Update Exp](#)

**Request Type:** Transit For Reshelving  
**ID:** 7440181020002959  
**Creator:** [REDACTED]  
**MMS ID:** 9949072661502959  
**Pickup Location:** Special Collections Library

**Place in Queue:** 0  
**Call Number:** IN PROCESS  
**Request Date:** 09/07/2017  
**Material Type:** Book

**Workflow Step:** Transit Item  
**Process Status:** In Process  
**Managed By Department:** MAIN Acquisitions Department  
**Process Date:** 09/07/2017  
**Expiration Date:** 09/07/2017

2  **The beloved invader : a novel / Eugenia Price.** [Print Slip](#) [Update Exp](#)

**Request Type:** Transit For Reshelving  
**ID:** 7516484050002959  
**Creator:** [REDACTED]  
**MMS ID:** 9949072172302959  
**Pickup Location:** Special Collections Library  
**Barcode:** 2108058480362

**Place in Queue:** 0  
**Call Number:** Ga Room IN PROCESS  
**Request Date:** 09/13/2017  
**Material Type:** Book

**Workflow Step:** Transit Item  
**Process Status:** In Process  
**Managed By Department:** MAIN Acquisitions Department  
**Process Date:** 09/13/2017  
**Expiration Date:** 09/14/2017

3  **Film music / Mark Russell & James Young.** [Cancel](#) [Print S](#)

**Request Type:** route to Music Cataloging  
**ID:** 7542054930002959

**Place in Queue:** 0  
**Call Number:** Music Lib Media

**Workflow Step:** In Process

# Finding Recalled Items

- Books that are on loan can be recalled by multiple people. These books do not show up in the libraries' Pick From Shelf list. The only way to see them is to check Monitor Requests & Item Processes.

Facets << Resource Request Monitoring (41 - 60 of 83)

Type  
Request (83)

Material Type  
Book (6)  
Undefined (77)

Request Date  
Yesterday (1)  
Up to three days a... (3)  
Up to a week ago (2)  
Up to a month ago (23)  
Older (54)

Date Needed By  
Undefined (83)

Workflow Step Status  
Undefined (83)

Pickup Institution  
Georgia College & ... (1)

Activity Status : Active | Include Pending Resource Sharing Requests : Yes | Workflow Step : Undefined

Request/Process Type : Patron physical item request | Clear all

41  **The seven husbands of Evelyn Hugo : a novel / Taylor Jenkins Reid.** C  
Request Type: Patron physical item request **Place in Queue: 4**  
ID: 37392246420002959 Call Number: PS3618.E5478 S48  
Creator: System 2017  
MMS ID: 9949182474002959 Request Date: 02/16/2023  
Requester: [REDACTED]  
Pickup Location: Main Library

42  **The will to change : men, masculinity, and love / bell hooks.** C  
Request Type: Patron physical item request **Place in Queue: 1**  
ID: 37479538430002959 Call Number: HQ1090 .H66 2004  
Creator: System Request Date: 02/22/2023  
MMS ID: 9929952663902959  
Requester: [REDACTED]  
Pickup Location: McBay Science Library

# Status Change Issues in Alma

- When the loan status changes to Lost in Alma, Recall and Claims Returned statuses will be changed to Lost and you can no longer see that they had a different status.

The screenshot displays the Alma library system interface. At the top, there are tabs for 'Loans', 'Returns', 'Requests', and 'Network Activity'. Below these, there is a search bar with 'Item owner \* My institution' and a 'Scan item barcode \*' field. The main content area shows a table of loan records. The first record is for 'Cotton country.' with a due date of '01/27/2019 11:59:00 PM EST', barcode '321080104142...', loan date '01/19/2018', and status 'Lost'. A context menu is open over the 'Loan Notes' column, with 'View Notes' highlighted. A red arrow points to the 'View Notes' option. Below the table, there is a 'Loan Notes' section for 'Cotton country.' showing a barcode of '32108010414202' and a patron name. At the bottom, there is a table of loan notes with columns for 'Created On', 'Updated On', 'Updated By', and 'Note'. The first note is dated '01/24/2019' and contains the text 'Patron claims returned item in summer of 2018 (1/24/19 hl)'.

Title	Due Date	Barcode	Loan Date	Loan Status	Author	Library	Call Number	Loan Notes
1 Cotton country.	01/27/2019 11:59:00 PM EST	321080104142...	01/19/2018	Lost	Creekmore, Hubert,	Main Library	PS3505 .R398 F5 1950	✓

Created On	Updated On	Updated By	Note
1 01/24/2019	01/24/2019	[Redacted]	Patron claims returned item in summer of 2018 (1/24/19 hl)

# Physical Item Requests

The screenshot displays the Alma library management interface. The top navigation bar includes search filters for 'Physical titles' and 'Barcode', and the user is logged in as 'Main Library - Main Library Circulation'. The left sidebar contains navigation options: Alma PRODUCTION, Fulfillment, Admin, and Analytics. The main content area is titled 'Physical Item Requests' and includes a date filter for '05/11/2023'. A red arrow points to the 'Resource Requests' section in the sidebar, which includes options like 'Pick From Shelf', 'Scan In Items', 'Expired Hold Shelf', and 'Active Hold Shelf'. The main content area features an 'Organization Calendar' for 'Main Library' showing a schedule for May 11-14. Other widgets include 'Discovery Search' and a 'campus branches loans comparison 2 month widget' table.

Library Name	Material Type	Current Month Loans (In House + Not In House)	Previous Month Loans (In House + Not In House)
Art Library	Book	166	139
	Journal	1	2
	Visual material		1
Curriculum Materials Library	Book	41	206
	Visual material	5	3
Miller Learning Center	Book	223	625

# Pick From Shelf

The screenshot displays a library catalog interface for 'Pick Up Requested Resources (1 - 20 of 22)'. On the left, a 'Facets' sidebar is visible, with 'Request Date' and 'Request/Process Type' sections highlighted by red boxes. The 'Request Date' section includes options for 'Today (14)', 'Yesterday (1)', and 'Up to a Month Ago (7)'. The 'Request/Process Type' section shows 'Patron physical it... (22)'. Below these are 'Location' and 'Call Number' sections. The main content area shows a list of items, with a 'Sort by' dropdown menu open, listing options like 'Call Number - Asc', 'Call Number - Desc', 'Location Name - Asc', and 'Location Name - Desc'. A 'Print Slip Report' app card is overlaid on the right side of the screen, showing a bookshelf icon and the text 'Print Slip Report'. The background interface includes a top navigation bar with 'Cancel' and 'Print Slip Report' buttons, and a blue header bar with user profile and notification icons.

# Cancelling Items from Pick From Shelf

The screenshot displays a library management interface for 'Pick Up Requested Resources (1 - 20 of 29)'. The interface includes a search bar, a 'Select All' checkbox, and a 'Sort by: Location Name - Desc' dropdown. A list of resources is shown, with the first item being 'The concise Oxford dictionary of mathematics.' with location '9Repo 3' and call number 'Sci Ref QA5 .C53 2009'. A modal dialog box titled 'Confirm Request Cancellation' is open, featuring a search field with the text 'Look-up or select' and a list of cancellation reasons. The reasons include 'Request switched', 'Cannot be fulfilled', 'Requested material cannot be located', 'Cancelled at patron's request', 'Duplicate request', 'Booking request passed its release time', 'Date needed by has passed', 'Time to pick up resource from hold shelf has passed', 'Failed to locate potential suppliers', and 'Items moved'. A 'Confirm' button is visible at the bottom right of the dialog.

Cancelation reason	Notify user
Request switched	
Cannot be fulfilled	
Requested material cannot be located	
Cancelled at patron's request	
Duplicate request	
Booking request passed its release time	
Cancelled at patron's request	
Cannot be fulfilled	
Date needed by has passed	
Duplicate request	
Time to pick up resource from hold shelf has passed	
Failed to locate potential suppliers	
Items moved	

# Customizing Request Cancellation Reasons in Alma

Configuring: University of Georgia

- Alma PRODUCTION
- Acquisitions
- Resources
- Discovery
- Fulfillment**
  - User Management
  - General
  - Analytics
  - Library Management
    - Opening Hours
    - Transit Time
    - Reshelve Without Transit Rules
    - SIP2 Bin Configuration
  - Locations
    - Remote Storage
  - Physical Fulfillment
    - Fulfillment Units
    - Terms of Use and Policies
    - Block Preferences
    - Auto Loan Renewal Rules
    - Item Policy
    - Advanced Policy Configuration
    - Overdue and Lost Loan Profile
    - Loan Recalls Configuration
    - Loan Status Name
    - Request Task Name
    - Request Cancellation Reasons**
    - Request Pickup Configuration
    - Self Check Messages
    - Request Priorities
    - Scan In Messages Configuration
  - Patron Configurations
    - User Groups
    - Patron Limits

Code Table

	Enabled	Move Up	Move Down	Code	Description
21	<input checked="" type="checkbox"/>	▲	▼	DateNeededByPassed	Date needed by has passed
22	<input checked="" type="checkbox"/>	▲	▼	BookingReleaseTimePassed	Booking request passed its release ti
23	<input checked="" type="checkbox"/>	▲	▼	FailedToLocateSuppliers	Failed to locate potential suppliers
24	<input checked="" type="checkbox"/>	▲	▼	ItemAlreadyAvailable	Item is already available
25	<input checked="" type="checkbox"/>	▲	▼	ResourceFoundInInstitution	The resource sharing request was ca
26	<input checked="" type="checkbox"/>	▲	▼	PurchaseRequest	Library will try to purchase the resou
27	<input type="checkbox"/>	▲	▼	AdditionalReason01	Additional Reason 01
28	<input type="checkbox"/>	▲	▼	AdditionalReason02	Additional Reason 02
29	<input type="checkbox"/>	▲	▼	AdditionalReason03	Additional Reason 03
30	<input type="checkbox"/>	▲	▼	AdditionalReason04	Additional Reason 04

# Active Hold Shelf

## Active Hold Shelf Items

Active Hold Shelf Items

Sort by:

1 - 20 of 97



- Additional ID
- Booking Request Start Time
- Call Number
- Hold Shelf Expiry Time
- Hold Shelf Placement Time
- Requester ID
- Requester Name
- Requester Preferred Name
- Title

research and learning styles define teaching competencies / Donna Walker

Cancel Request Update Expiry ...

Held For: [Redacted] Place in Queue: 0  
Preferred Identifier: 8110134541  
Held Since: 05/12/2023  
Held Until: 05/22/2023



- Requester ID
- Requester Name
- Requester Preferred Name
- Title

ng.  
- 3rd

Cancel Request Update Expiry ...

Held For: [Redacted] Place in Queue: 0  
Preferred Identifier: 811366806  
Held Since: 05/08/2023  
Held Until: 05/18/2023

# Expired Hold Shelf

Facets << Expired Hold Shelf Items (1 - 1 of 1) Back

**End of Hold Time**  
Yesterday (1)

**Request/Process Type**  
Patron physical item ... (1)

**Destination**  
Art Lib N6494.M35 H... (1)

**Material Type**  
Book (2)

**Held Since**  
Up to a month ago (1)

Reshelve Send to Circulation Desk(0) Send to Library(2) Activate Next(0) Send to Institution (0)

Select All Sort by : Additional ID ▾ Reshelve

1  **Good mail day : a primer for making eye-popping postal art / Jennie Hinchcliff, Carolee Gilligan Wheeler ; photographs by Von Span.** Reshelve Update Expiry

**Location:** Art Library Stacks **Held For:** [REDACTED]  
**Barcode:** 32108062985570 **Preferred Identifier:** 810772270  
**Call Number:** Art Lib N6494.M35 H56 2009 **Held Since:** 04/27/2023  
**Material Type:** Book **Held Until:** 05/11/2023

- **Reshelve:** Items shelved at the current Alma library location
- **Send to Circulation Desk:** Items handled by another circulation desk within the same Library
- **Send to Library:** Items go to another library within your institution
- **Activate Next:** Items that have another request pending in the queue for pickup at that same circulation desk
- **Send to Institution:** Items go to another institution (GIL Express)

# GIL Express Basics

# GETTING STARTED WITH GIL EXPRESS

## Subscribe to these lists :

- GIL Fulfillment Community - [G2FULFILLMENT@LISTSERV.UGA.EDU](mailto:G2FULFILLMENT@LISTSERV.UGA.EDU)
- GIL General Information – [GA-G2ALL@LISTSERV.UGA.EDU](mailto:GA-G2ALL@LISTSERV.UGA.EDU)
- GIL Express Courier Information – [GIL-COURIER-L@LISTSERV.UGA.EDU](mailto:GIL-COURIER-L@LISTSERV.UGA.EDU)
- To subscribe to the email lists go to the website - [listserv.uga.edu](http://listserv.uga.edu)
- **Or**, email [helpdesk@usg.edu](mailto:helpdesk@usg.edu)

# GIL Express Website

[http://gil.usg.edu/gil\\_express](http://gil.usg.edu/gil_express)

GALILEO Interconnected Libraries

[About GIL](#) ▾

[Events](#) ▾

[GIL Alma Implementation](#)

[Support](#) ▾

[Contact](#) ▾

## About

### GIL EXPRESS

**GIL Express** is a service offered at [all libraries within the University System of Georgia \(USG\)](#). The service is an innovative resource sharing initiative that allows students, faculty and staff access to all eligible circulating material at all USG libraries. GIL Express is available to all eligible patrons through an on site (walk up) service.

**Who's eligible:** All currently enrolled students and currently employed faculty and staff who are in good standing at their Home Library are eligible to use GIL Express. Retired faculty and staff should check with their Home Library to determine if they are eligible to use this service.

**Scope:** Printed books (monographs) that are normally lent for the standard loan period at the Holding Library are available to be borrowed through GIL Express.

**Exceptions include, but are not limited to:**

- Reserve materials
- Reference materials or other materials that do not circulate without special permission
- Materials housed in any Special Collection
- Bound journals
- Journal articles
- Material that the Holding Library designates as not eligible for GIL Express loans

**Borrowing materials not available through GIL Express:** Materials that are not available through GIL Express (i.e. journal articles) may be available through Interlibrary Loan. To



MORE INFORMATION

[General Information](#)

[FAQ for GIL Express](#)

[STAT Courier](#)

[STAT Mailing Instructions](#)

[GIL Express Policies](#)

[Documents for GIL Express](#)

# GIL Express Documents

- <https://gil.usg.edu/>

GALILEO Interconnected Libraries About GIL ▾ Events ▾ GIL Alma Implementation **Support ▾** Contact

Voyager Access Reports ODBC Drivers and Instructions	ODBC Drivers and instructions for installing them.	Voyager Reports	GIL Status
Voyager Access Reports Virtual Machine	This is a virtual machine that comes pre-loaded with Voyager Access Reports. We typically use this as a last resort option when Voyager Access Reports does not work on a particular workstation. You need to request permission to view this folder. Simply click the download link and then click "Request Access".	Voyager Reports	Training <b>Downloads &amp; Docs</b>
Gary Strawn Tools	Gary Strawn from Northwestern University Library has created utilities, including the Cataloger's Toolkit, to help fill various gaps in Voyager functionality. While we don't officially support these tools, we know they can be helpful when performing batch-tasks... just handle with care.	Voyager party to	Ex Libris Customer Center
Next Generation ILS Documents	This folder contains various documents related to GIL's next gen ILS initiative.	Next Ge	Listservs Z39.50 Settings RDA Toolkit
GIL Support User Guide	This document was created to help staff find information about common GIL-related topics. It was originally created to distribute to people who attended our "All About GIL" GUGM session in 2014. It's ever-evolving, so it is best to continue to view it online than to print it out.	GIL General	
GIL Server Layout	This Google Spreadsheet shows which institutions are running on which servers. You need to request permission to view this document. Simply click the download link and then click "Request Access".	GIL General	
GIL Fact Sheet	An informational document about GIL. This is several years out of date, but still contains some useful info.	GIL General	
Gil Express Documents	These documents contain information and files related to GIL Express, including mailing labels and instructions.	GIL Express	

# Documents Google Drive

My Drive > Gil Express >



Folders

Name ↓

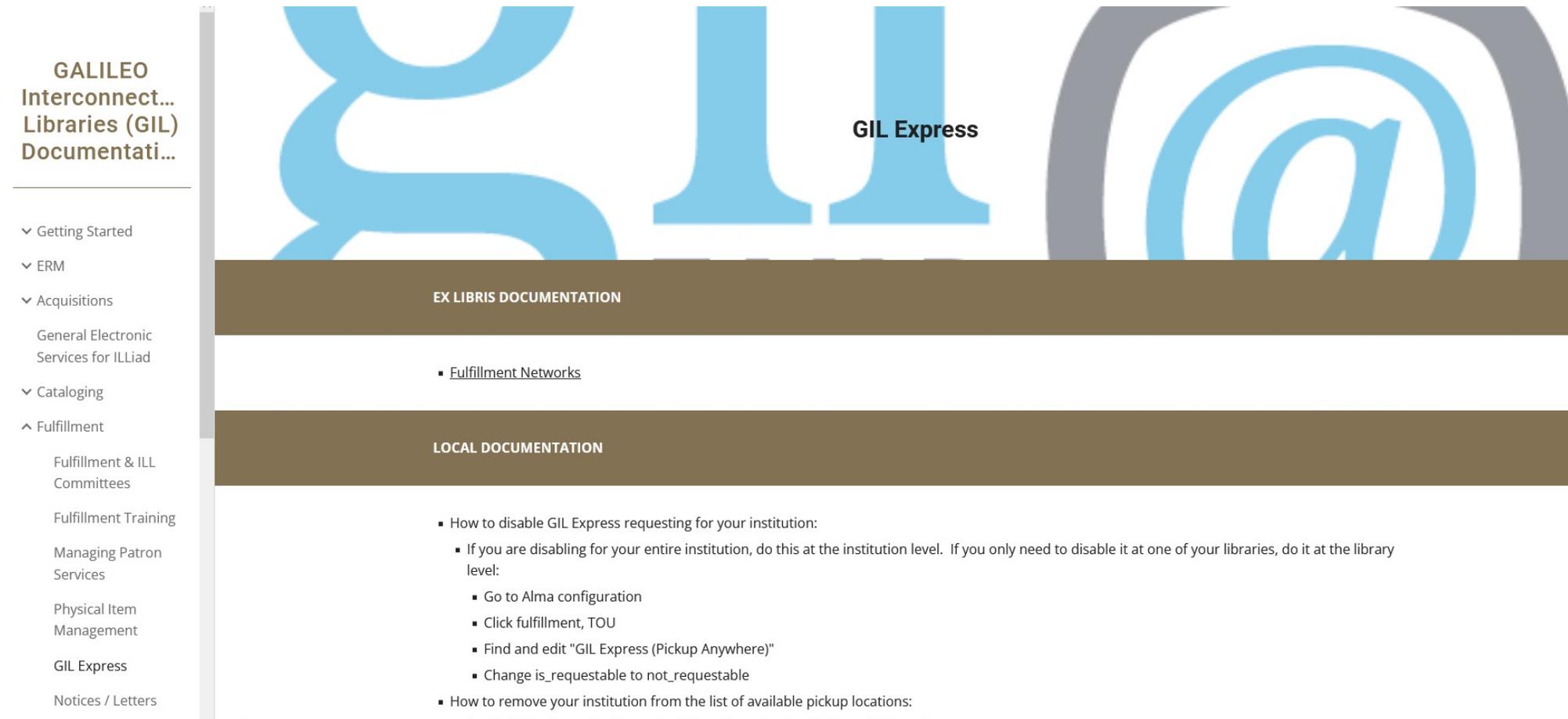
- Stat Xcelerator Tracking
- STAT Logsheets
- Stat ILL Labels 2018
- GIL Express Blocking
- GE Stat Labels 2018
- DO NOT USE-Old Stat Couri...
- AutoFulfillment Network (A...
- ARCHE Labels as Docs

Files

GIL Express Contact List	GE_Courier Delivery Locatio...	GE_address_with_codes_20...	Copy of GIL Express Blocki...	Claim Form.doc	Blocking in Alma.docx
2020 Jan_May_chart.docx	2019Institutional Billing Ins...	2019GIL Express_Institutio...	2018GIL route codes_revis...		

# GIL Training Wiki – GIL Express

- <https://sites.google.com/view/g3almatraining/fulfillment/gil-express>



**GALILEO Interconnect... Libraries (GIL) Documentati...**

- ▼ Getting Started
- ▼ ERM
- ▼ Acquisitions
  - General Electronic Services for ILLiad
- ▼ Cataloging
- ▲ Fulfillment
  - Fulfillment & ILL Committees
  - Fulfillment Training
    - Managing Patron Services
    - Physical Item Management
    - GIL Express**
    - Notices / Letters

## EX LIBRIS DOCUMENTATION

- [Fulfillment Networks](#)

## LOCAL DOCUMENTATION

- How to disable GIL Express requesting for your institution:
  - If you are disabling for your entire institution, do this at the institution level. If you only need to disable it at one of your libraries, do it at the library level:
    - Go to Alma configuration
    - Click fulfillment, TOU
    - Find and edit "GIL Express (Pickup Anywhere)"
    - Change is\_requestable to not\_requestable
- How to remove your institution from the list of available pickup locations:

# Viewing GIL Express Activity in Alma

- GIL Express information, including the Hold status, is located under the “Network Activity” tab on the Patron’s Account

The screenshot displays the Alma system interface. At the top, there are navigation tabs: 'Loans', 'Returns', 'Requests', and 'Network Activity'. The 'Network Activity' tab is selected and highlighted with a black box. Below the tabs, there is a dropdown menu labeled 'Display information from institution'. Below this, there are two main sections, each with a red box around its header:

- Patron Requests**: This section shows a list of two requests. The first request is from Georgia State University for 'The hum and the shiver / Alex Bledsoe.' with a request type of 'Patron physical item request' and a status of 'On Hold Shelf'. The second request is from the University of West Georgia for 'The wrong end of time.' with a request type of 'Patron physical item request' and a status of 'Transit Item'.
- Patron Loans**: This section shows a list of two loans. The first loan is from Abraham Baldwin Agricultural College for 'The ship beyond time / Heidi Heilig.' with a due date of '06/10/2019 08:00:00 PM EDT' and a status of 'Renewed'. The second loan is from the University of North Georgia for 'Muse of nightmares / Laini Taylor.' with a due date of '05/29/2019 06:00:00 PM EDT' and a status of 'Renewed'.

# GIL Express Pick From Shelf

The screenshot displays the Alma library system interface for 'Physical titles'. The main content area is titled 'Pick Up Requested Resources (1 - 20 of 85)'. A list of resources is shown, including 'Crash : cinema and the politics of speed and stasis / Karen Beckman.', 'Teaching and learning Chinese in global contexts : multimodality and literacy in the new media age / edited by Linda Tsung and Ken Cruickshank.', 'Victorian Sappho / Yopie Prins.', and 'The hounds of no / Lara Glenum.'. Each resource entry includes a checkbox, a small image, the title, author, edition, location, call number, and the number of requests. Action buttons like 'Cancel Request' and 'Mark as Missing' are visible for each item.

On the left side, there is a 'Facets' panel with several filters. The 'Pickup Institution' filter is highlighted with a red box and contains the following options:

- Augusta University (2)
- Columbus State U... (2)
- Georgia Highlands... (1)
- Georgia Tech (1)
- + More (3)

Other filters in the 'Facets' panel include 'Call Number', 'Destination', and 'Material Type'. The top navigation bar shows 'Physical titles' and 'Title' dropdowns, a search icon, and the text 'Main Library - Main Library Circulation'. A 'Print Slip Report' button is located in the top right corner.

# Processing Pick From Shelf

- Books are pulled from the shelf and scanned in Alma. Always use the Scan In function for GIL Express books. Scan In moves items from one workflow process to another and automatically generates a Transit Slip. Transit slips are placed in the books being sent to other libraries.
- GIL Express books are sent to other USG libraries through STAT courier. USG institutions who are members of ARCHE (Atlanta Regional Council for Higher Education) can use the ARCHE van for deliveries to other member institutions.
- PDF labels for STAT Courier are located on the GIL Express website. Books are placed in secure bags for delivery.
- Books that are not found should be marked as missing and the request should be cancelled.

# Receiving Requested Material

- Scan in each item to determine how to process
- When scanned, the item is routed to another location. This could happen for several reasons: patron cancelled item, item sent to the wrong location, etc. Send the item to the specified location and contact the owning library if necessary.
- Holds expire after 10 days. Then the record moves to the Expired Hold shelf.

# Managing the Hold Shelves

- Patron doesn't want the item – cancelling an active hold

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Atlanta unbound : enabling sprawl through policy and planning / Carlton Wade Basmajian.

Update Expiry

New Audit Trail

- Go to the Active Hold Shelf
- For Gil Express items, Update Expiry is the only option available to change
- Update expiration date to a past date
- This action sends the record to the Expired Hold Shelf
  
- Patron doesn't pick up and item - hold expires
- Record is moved to the Expired Hold Shelf

# Expired Hold Shelf

- **Send to Institution:** Items to go to another institution (GIL Express)

Expired Hold Shelf Items Back

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Reshelve   Send to Circulation Desk(0)   Send to Library(0)   Activate Next(0)   **Send to Institution (0)**

Select All   Sort by : Additional ID ▾ Reshelve

- **Reshelve:** Items handled by your “currently at” location’s circulation desk
- **Send to Circulation Desk:** Items handled by another circulation desk within the same Library
- **Send to Library:** Items to go to another library within your institution
- **Activate Next:** Items that have another request pending in the queue for pickup at that same circulation desk

# Processing GIL Express Expired Holds

- On the Expired Hold Shelf page, select Send to Institution
- Click the Transit link associated with the relevant item or, to send multiple items, select the Select All check box, click Transit.
- The item is put in **transit** and a transit slip will print.

The screenshot displays the Alma library system interface. At the top, the navigation bar includes 'Alma' and various service links: 'Manage Patron Services', 'Scan In Items', 'Pick From Shelf', 'Expired Hold Shelf', and 'Main Library - Main Library Circulation'. Below the navigation bar, the search area shows 'Physical items' and 'Barcode' filters. The main content area is titled 'Expired Hold Shelf Items' and features a 'Back' button and a 'Transit' button. Below this, there are several action buttons: 'Reshelve(0)', 'Send to Circulation Desk(0)', 'Send to Library(0)', 'Activate Next(0)', and 'Send to Institution'. The 'Send to Institution' button is highlighted with a red box. Below the buttons, there is a 'Select All' checkbox, which is also highlighted with a red box. The item details for 'Caliban and the witch / Silvia Federici' are displayed, including the institution 'Georgia Southern University', library 'Zach S. Henderson Library', location 'Stacks 4th Floor', call number 'HQ1147.E85 F444 2004', barcode '0200105385948', material type 'Book', held for information, preferred identifier '1695761270002950', held since '10/16/2017', and held until '10/19/2017'. The 'Transit' link is highlighted with a red box.

# Renewals

- **Books are automatically renewed for 84 days.**
- **Books are renewed on the day before the due date.**
- **This can result in a third short renewal of 1-3 days.**



# GIL Express Blocking

- A GIL Express Blocking report is emailed to specific people at each USG library. If you should be added to the list of people at your library who receive this report, please contact GIL Support at [helpdesk@usg.edu](mailto:helpdesk@usg.edu).
- When a patron keeps a GIL Express book past the final due date, they are added to the GIL Express Blocking Report. There is a 7 day grace period before patrons are added to the report.
- Detailed instructions on blocking patrons in Alma are available on the GIL Express website. The GIL Express Block is added by the system. At UGA, we place a hold on the patron's account in Banner and add a second (Demerit) block and a note about the hold to their library account.
- When the person is removed from the blocking list, the GIL Express Block is automatically removed. We manually remove the Demerit Block and remove the hold in Banner.

# Institutional Billing

- Institutional Billing occurs once a year. The accounting period is July 1 through June 30 of each year.
- Detailed instructions for Institutional Billing are located on the GIL Express website noted at the beginning of this presentation. The instructions are updated for each billing cycle.
- Not everyone who works with GIL Express will be involved with Institutional Billing. Contacts for billing may not be the same as those listed on the GIL Express Contact List.

# Questions?

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