Fulfillment and GIL Express: Reviewing the Fundamentals

GIL Users Group Meeting

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Fulfillment in Alma

Fulfillment Basics

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.

9	☐	Circulation Desk Manager	Fulfillment	Gwinnett Campus	Gwinnett Desk
10	☐	Circulation Desk Manager	Fulfillment	Griffin Georgia Experiment Station	Griffin Circulation
11	☐	Circulation Desk Operator	Fulfillment	Main Library	Main Library Circulation, Main Library Reserves
12	☐	Circulation Desk Operator	Fulfillment	Science Library	Science Library Circulation

Managing Patron Accounts

Finding Patrons

Using Advanced Search for Patrons

User Information

Finding Titles

More Information on Finding Titles

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

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.

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 * | My institution | ▼ |
| Scan item barcode * | 32108060829713 | ✕ ☰ OK |

Override return date and time: 05/13/2019 24:00 ✕ 📅

- 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

Scan in Items | Change Item Information

Change Type	Temporary ▼	Due Back		📅
Location	2Reserves Main ▼	Item Policy	2 hour Course Reserves ▼
Call Number Type	Library of Congress classification ▼	Call Number	
Reading List		☰		
New Barcode				
Scan item barcode *		☰ OK		
Check Requests	☑			

Creating On-the-Fly Records

On-the-Fly Record Information

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

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.

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.

Physical Item Requests

Pick From Shelf

Cancelling Items from Pick From Shelf

Customizing Request Cancellation Reasons in Alma

Active Hold Shelf

Active Hold Shelf Items

| Active Hold Shelf Items |

Sort by : [Look-up or select ▼]   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

1   research and learning styles define teaching competencies / Donna Walker   Cancel Request   Update Expiry   ···

Held For: ▮▮▮▮▮▮▮▮▮▮▮▮   Place in Queue: 0
Preferred Identifier: 810134541
Held Since: 05/12/2023
Held Until: 05/22/2023

2   ng.   Cancel Request   Update Expiry   ···

- 3rd

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

Expired Hold Shelf

- **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

- GIL General Information – GA-G2ALL@LISTESERV.UGA.EDU

- GIL Express Courier Information – GIL-COURIER-L@LISTSERV.UGA.EDU

- To subscribe to the email lists go to the website - listserv.uga.edu

- **Or**, email helpdesk@usg.edu

GIL Express Website

http://gil.usg.edu/gil_express

GALILEO Interconnected Libraries

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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

GIL Express
GALILEO Interconnected Libraries
Cooperative Borrowing

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/**

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Voyager Access Reports ODBC Drivers and Instructions	ODBC Drivers and instructions for installing them.	Voyager Reports
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
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
Next Generation ILS Documents	This folder contains various documents related to GIL's next gen ILS initiative.	Next Ge
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

Support dropdown menu:
- GIL Status
- Training
- Downloads & Docs
- Ex Libris Customer Center
- Listservs
- Z39.50 Settings
- RDA Toolkit

Documents Google Drive

GIL Training Wiki – GIL Express

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

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

GIL Express Pick From Shelf

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

21   Atlanta unbound : enabling sprawl through policy and planning / Carlton Wade Basmajian.   Update Expiry   ew 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

| 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 <u>Send to Institution</u>
- Click the <u>Transit</u> link associated with the relevant item or, to send multiple items, select the <u>Select All</u> check box, click <u>Transit</u>.
- The item is put in **transit** and a transit slip will print.

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.

- 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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