Fulfillment and GIL Express: Reviewing the Fundamentals

GIL Users Group Meeting
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University of Georgia Libraries
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.
Managing Patron Accounts
Finding Patrons
Using Advanced Search for Patrons
# User Information

## User Details

<table>
<thead>
<tr>
<th>User Information</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name</td>
<td>Mary</td>
</tr>
<tr>
<td>Last name</td>
<td>Poland</td>
</tr>
<tr>
<td>Preferred middle name</td>
<td></td>
</tr>
<tr>
<td>Primary identifier</td>
<td></td>
</tr>
<tr>
<td>PIN number</td>
<td></td>
</tr>
<tr>
<td>Job description</td>
<td></td>
</tr>
<tr>
<td>User group</td>
<td>Faculty</td>
</tr>
<tr>
<td>Website URL</td>
<td></td>
</tr>
<tr>
<td>Middle name</td>
<td>W</td>
</tr>
<tr>
<td>Preferred first name</td>
<td></td>
</tr>
<tr>
<td>Preferred last name</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td></td>
</tr>
<tr>
<td>Job category</td>
<td>Please select a value</td>
</tr>
<tr>
<td>Gender</td>
<td></td>
</tr>
<tr>
<td>Campus</td>
<td></td>
</tr>
<tr>
<td>Preferred language</td>
<td>English</td>
</tr>
</tbody>
</table>

## Account Type

- Type: External
- Record type: Public
- User group: Faculty
- Identity Service: Not Used
- Owner: SIS
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.

- 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.
Creating On-the-Fly Records
On-the-Fly Record Information
## More OTF Record Information

<table>
<thead>
<tr>
<th>Course Restricted</th>
<th>Suppress from Discovery</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Item Information

<table>
<thead>
<tr>
<th>Location</th>
<th>Material Type</th>
<th>Barcode</th>
<th>Item policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Library: 99Main On the Fly (Main_OTF)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public note</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
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
Cancelling Items from Pick From Shelf
Customizing Request Cancellation Reasons in Alma
### Active Hold Shelf Items

<table>
<thead>
<tr>
<th>#</th>
<th>Title</th>
<th>Requester ID</th>
<th>Requester Name</th>
<th>Requester Preferred Name</th>
<th>Hold For:</th>
<th>Place in Queue:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>3</td>
<td></td>
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</tr>
</tbody>
</table>
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@LISTSERV.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

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 (e.g., journal articles) may be available through interlibrary loan. To...
GIL Express Documents

- [https://gil.usg.edu/](https://gil.usg.edu/)
GIL Training Wiki – GIL Express

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

- 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
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
  - 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)

  - **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.
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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