Alma Training
Student Library Assistants
Wilson Dental Library and Learning Center

Introduction

All USC Libraries use Ex Libris’ Alma as their Integrated Library System (ILS). This means that while using Alma you will be able to view all USC Libraries’ items as well as search all USC patrons. We take the privacy of all of our patrons very seriously. We request that you do not alter records or discuss patron records with anyone but full time staff. Alma is a web-based system that is accessible via any browsers (currently bookmarked via Chrome on circulation computers).
Logging In and Out of Alma

Alma requires you to log in using your USC NetID and password.

Once logged in, you should see your name in these two locations:

You should be sure to sign out of Alma when your shift ends; however, you still need to close the browser after your shift to ensure you do not remain logged in for the next student.

Upon first log in, you will be prompted to select your circulation desk. You should always select “Wilson Dental Library – Circulation Desk” for both Library and Learning Center shifts.
Patrons

Alma will be automatically updated with USC patron information. **ONLY take the USC ID Card** and not Dental Clinic Badges. Students were permitted to use both with our previous system.

**To Find a Patron:**

1. Go the Alma button at the top left of the Alma home page. Go to Fulfillment → Checkout/Checkin → Manage Patron Services.

2. Scan their USC ID.
**Patrons with Fines and/or Blocks:**

After you scan a patron ID, you will see the below pop up window if there is a fine and/or block on their account.

![Pop up window](image)

**At this point in the transaction, alert a Staff member as student library assistants are not allowed to handle fines.**

A patron’s fine amount is listed as their Active Balance.
Checking a Patron’s Loans:

To view ALL loans on a patron’s account, select All from the Loan Display drop-down menu.

This view will tell you:

- Title
- Due Date
- Barcodes
- Fines
- Loan Date (date the item was originally checked out)
- Loan Status (examples: normal, renewal, lost, etc.)
- Item Policy
- Library
Check Out:

1. Make sure you are at the Manage Patron Services page and scan patron’s USC ID.
2. Scan item’s barcode.

As you scan items for check out, you will see them correctly registering as the titles, due dates, barcodes are generated. Do not forget to remind patrons of their due date.

_We do not print receipts. Receipts and notices are sent directly to patron’s USC email address in Alma._
Check In:

There are two ways to check in items.

1. If you are already in the patron’s record, you can use the Returns tab to scan in items.
   a. As you scan in items, you will see if fines were accrued and under Next Step, you will see what to do next. Next Step will tell you to Reshelve the item, Place on Hold Desk, etc,

1. Go to the Alma button and go to Fulfillment → Checkout/Checkin → Return Items. Beginning scanning barcodes of returned items.
Renewals:

1. Pull up a patron record by going to Manage Patron Services and scan their ID (as described above).
2. Change the Loan Display to All so you can see all items they have checked out.
3. From this window, you can check the box next to **WDL's items** the patron wants to renew.

A successful renewal will provide a status report like the image below.

Each item will also either give a green check mark for successful renewals or a red exclamation point for failed renewals. New due dates will be listed as well.
**Activity Reports:**

Alma does not print receipts or manually send out notices to patrons. This can be managed from the patron’s account and will result in the patron getting an email notice.

- **Send Activity Report:** This sends a report detailing their activity (loans, overdues, and fines) from all libraries.
- **Send Return Receipt:** This sends a report of what the patron just returned.
- **Send Loan Receipt:** This sends a report of what the patron has just checked out (will only include the most recent patron transaction; not a total list of items checked out on their account).
- **Send Requests Report:** This sends a report detailing the status of their hold requests (whether they are on the hold shelf or still unavailable for pick up).
Searching:

Quick Item Search:

1. Type your search term in the quick search box next to the Alma button. Click magnifying glass or hit “enter”. By default, this will conduct an All Titles search.

2. You can limit your results from three different areas:
   a. Find (highlighted in green): will let you choose between seeing All Titles, or only Physical or Electronic Titles. It will also let you change the search to keyword, subject, etc.
   b. Sort by (highlighted in blue): will let you sort results by rank, title, publication date, etc.
   c. Limit results to (highlighted in red: will let you limit result by material type, language, publication year, etc.

3. Now that you have limited your results and have found the items you were looking for. You need to determine their availability and location.
   a. Availability: Each item with have Availability listed to show if the items are available physically or online.
b. Location: If the items are available physically, the library code (DEN for Wilson Dental Library) will appear, along with the call number.

4. For this example, let’s say you were looking at result #2 from the above image. Select items (highlighted in green)

5. From this page, you will be able to determine: library (red), shelving location (blue), call number (green), status (yellow), and process type (pink). The status will tell you if the item is in place or not. Process Type will tell you if the item is Lost, Damaged, On Loan, etc. If it is blank in the Process Type box, then the item should be available for circulation.