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TOPICS

A) Getting Started
- Login & Select Service Desk

B) Patron Related Activities
- Search for patron record
- Loan Display
- Borrow Items
- Return Items
- Return Display
- Backdate return
- View email notifications
- Renew Items
- Change Due Date
- Check Fines
- Fines Payment
- User Block

C) Item Related Activities
- Search for item
- View Item Status (Process Type = Loan/Missing/Acquisition)

D) Reservation
- Item Reservation
- Check Requested Item in Patron record
- Cancel Reservation

E) Daily Tasks
- Clear Expired Holdshelf
- Sorting of items
- Scan In Items (In-house use/Browse Count)
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F) Other useful functionalities
   - Add widget to dashboard (eg. Primo)
   - Set up quick links
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LOGIN & SELECT SERVICE DESK

Click on the “Location” icon on the top right hand corner

Choose the Service Desk which you are currently located

SEARCH FOR PATRON RECORD

Fulfillment menu --> Manage Patron Services --> Scan patron's ID or search for patron --> GO
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BORROW ITEMS

Fulfillment menu --> Manage Patron Services --> Scan patron's ID or search for patron --> GO

Scan item barcode --> OK
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LOAN DISPLAY

Loan Display ---> All loans
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RETURN ITEMS

Fulfilment menu ---> Return Items ---'> Scan item barcode ---'> OK

Look out for “Next Step”.

<table>
<thead>
<tr>
<th>Title</th>
<th>Return Date</th>
<th>Due Date</th>
<th>Barcode</th>
<th>Lended Date</th>
<th>Patron</th>
<th>Next Step</th>
<th>Owned By Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economics / Matthew Forsdike, introduction by James Rollin</td>
<td>20/06/2017</td>
<td>04/07/2017</td>
<td>8140992</td>
<td>25/06/2017</td>
<td>NG ZHENG HAN</td>
<td>On Hold Shelf</td>
<td>Li Ka Shing Library</td>
</tr>
</tbody>
</table>
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RETURN DISPLAY

Fulfilment menu ---> Manage Patron Services ---> Scan patron's ID or search for patron ---> GO

Returns Display ---> All (ie. List of reading history)
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BACKDATE RETURN

Fulfilment menu ---> Return Items ---> Scan Item barcode ---> OK

Click … (more actions) ---> Select Return Date

Select the return date ---> Submit
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VIEW EMAIL NOTIFICATIONS

Fulfilment menu ---> Manage Patron Services ---> Scan patron's ID or search for patron ---> GO

Click on the ID

Click Attachments
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Click ... (more actions) ---> View

Email that was sent to user
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RENEW ITEMS

Fulfilment menu --- Manage Patron Services --- Scan patron's ID or search for patron --- GO

Loan Display --- All

Select the items to be renewed. Click on “Renew Selected”.

<table>
<thead>
<tr>
<th>Title</th>
<th>Due Date</th>
<th>Barcode</th>
<th>Title</th>
<th>Due Date</th>
<th>Barcode</th>
<th>Title</th>
<th>Due Date</th>
<th>Barcode</th>
</tr>
</thead>
<tbody>
<tr>
<td>to kill a mockingbird / based on the novel by Harper Lee; study guide by Patricia Mills</td>
<td>11/07/2017</td>
<td>U00078247</td>
<td>to kill a mockingbird / based on the novel by Harper Lee; study guide by Patricia Mills</td>
<td>11/07/2017</td>
<td>U00078247</td>
<td>to kill a mockingbird / based on the novel by Harper Lee; study guide by Patricia Mills</td>
<td>11/07/2017</td>
<td>U00078247</td>
</tr>
</tbody>
</table>
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CHANGE DUE DATE

Fulfilment menu ---> Manage Patron Services ---> Scan patron's ID or search for patron ---> GO

Loan Display ---> All
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Click ... (more actions)/Select books ---> Change due date

Select the due date ---> Change due date
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**CHECK FINES**

Fulfilment menu --> Manage Patron Services --> Scan patron's ID or search for patron --> GO

Click on the amount in the Active Balance

A breakdown of the fines will be listed
FINES PAYMENT

Fulfilment menu --- Manage Patron Services

Scan patron’s ID or search for patron --- GO

Look for the active fines --- Pay
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Choose NETS Cash Card. Enter payment amount ---> Send

Confirm and fine will be cleared in Alma.
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USER BLOCK

Fulfilment menu ---> Manage Patron Services

Scan patron’s ID or search for patron ---> GO

Patron Identification

User Notes

Click on ID.

Blocks ---> Add Block & Save
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Choose the reason for the block --- Add and Close

Confirmation page: Check that the active button is turned on.
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ITEM SEARCH

All titles search

Search box ---> Select “All titles” from dropdown list

Physical titles search

Search box ---> Select “Physical titles” from dropdown list (This allows search by Call #)
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VIEW ITEM STATUS

Search box ---> Select “Physical items” from dropdown list (This is useful if we want to view item status)
Enter title/barcode in the search box ---> GO

<table>
<thead>
<tr>
<th>Item is available</th>
<th>(No process type; Status = Item in place)</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="" /></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item on loan</th>
<th>(Process type = Loan; Status = Item not in place)</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image2" alt="" /></td>
<td></td>
</tr>
</tbody>
</table>

Check Status ---> Click on Process type to view borrower

More information on loan

<table>
<thead>
<tr>
<th>On Loan Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
</tr>
<tr>
<td>Description</td>
</tr>
<tr>
<td>Borrower</td>
</tr>
<tr>
<td>Loan Date</td>
</tr>
<tr>
<td>Due Date</td>
</tr>
<tr>
<td>Loan status</td>
</tr>
<tr>
<td>Process ID</td>
</tr>
<tr>
<td>Booking loan?</td>
</tr>
</tbody>
</table>
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Missing Item (Process type = Missing; Status = Item not in place)

- **Introductory statistics / Hwee-Kwan Chow ... [et al.]**
- **Book**: By Chow, Hwee Kwan. (Singapore: Pearson/Prentice-Hall 2007+)
- **Barcode**: A007937098
- **Update Date**: 13/08/2015
- **Library**: Li Ka Shing Library
- **Process type**: Missing
- **Permanent Location**: Books Level 3
- **Call Number**: QA276.12 .158 2007
- **Call Number Type**: Library of Congress classification
- **Alternative Call Number Type**: Library of Congress classification
- **Status**: Item not in place
- **Material Type**: Book
- **Description**: CD-ROM 2
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ITEM RESERVATION

Search box --- Select “Physical items” from dropdown list
Enter title/barcode in the search box --- GO

Request --- Request Type = Patron physical item request
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Enter Requester name/ID --- Select pickup location

(Note: May need to click on “Override on Shelf Request Policy” before you are able to select pickup location)

Confirmation of request being processed successfully

![Image of request creation interface]

The request was successfully submitted; request id = 1604002370002601
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Fulfillment menu ---> Scan in Items

Scan item barcode ---> OK

Destination should indicate “On Hold Shelf”
Requestor’s Record

Fulfillment menu ---> Manage Patron Services ---> Scan patron's ID or search for patron ---> GO

Patron Identification

Request Tab ---> Check through requests

Once a borrowed item is reserved, the loan period for the current borrower will be reduced to 2 weeks from the day of reservation and non-renewable (For loan period with less than 2 weeks to due date, no change of due date for current borrower)
**CANCEL RESERVATION**

Fulfilment menu --> Manage Patron Services --> Scan patron's ID or search for patron --> GO

Indication in Notes field: *User has 2 item(s) waiting for pickup at this desk*

Click on “Request” Tab to see the reserved item

Click on “…” --> Select “Cancel”.

---

<table>
<thead>
<tr>
<th>Title</th>
<th>Request Type</th>
<th>Request Date</th>
<th>Start Time</th>
<th>End Time</th>
<th>Expiry Date</th>
<th>Title Status</th>
<th>Process Date</th>
<th>Managed By</th>
<th>Place in Queue</th>
<th>Resource Sharing</th>
</tr>
</thead>
<tbody>
<tr>
<td>To kill a mockingbird / Harper Lee.</td>
<td>Patron physical item request</td>
<td>29/06/-</td>
<td>-</td>
<td>27/06/-</td>
<td>On Hold Shelf</td>
<td>29/06/-</td>
<td>Li Ka Shing Library Service Desk</td>
<td>(0) No</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Economics / Mathew Forstater : Introduction by James Roll.</td>
<td>Patron physical item request</td>
<td>29/06/-</td>
<td>-</td>
<td>27/06/-</td>
<td>On Hold Shelf</td>
<td>29/06/-</td>
<td>Li Ka Shing Library Service Desk</td>
<td>(0) No</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Who moved my cheese? : an amazing way to deal with change in your work and in your life / Spencer Johnson.</td>
<td>Patron physical item request</td>
<td>29/06/-</td>
<td>-</td>
<td>27/06/-</td>
<td>Not Started</td>
<td>29/06/-</td>
<td>Li Ka Shing Library Service Desk</td>
<td>(0) No</td>
<td>-</td>
<td></td>
</tr>
</tbody>
</table>
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Select cancellation reason and click “Confirm”
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CLEAR EXPIRED HOLD SHELF

Fulfilment menu --> Expired Hold Shelf

Look at “Reshelve” & “Activate Next” tabs
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Reshelve Tab

Activate Next Tab
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SORTING ITEMS

IMPORTANT: Ensure the right location is selected.

Fulfilment menu ---> Scan In items

Set automatically print slip to “Yes”

Scanning in items ---> Sort the items based on their Destination and placed on the trolleys accordingly in processing room
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IN HOUSE USE/BROWSE COUNT

Fulfilment menu ---> Scan In items

Set automatically print slip to “No” and check “Register in-house use” ---> Scan In items
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OTHER USEFUL FUNCTIONALITIES

Add Widget to Dashboard

Home page --> Add Widget

Select the Widget
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Widget added
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**Set Up Quick Links**

Click on the star to choose your desired quick link

![Diagram of quick links setup](image)

To access quick links, click on the star on the main menu bar

![Diagram of quick links on main menu bar](image)

**Quick links tab**

![Diagram of quick links tab](image)