

ALMA training session with Melissa Pierce, Brenda Sturtz and Sylvia Wiegel
4-12-17

Melissa suggests that we bookmark the ALMA website on the Circulation Desk computer in whatever browser(s) the students typically use. We should also bookmark it on our computers at our desks.

Currently employees will log onto ALMA using their **Employee ID# plus FirstLast1**. This will eventually be changed so we will use our fristinitiallastname@clarion.edu and the corresponding password.

Students are to use **Suhrcirculation**, Student1. Students are identified as Circulation Desk Operator with limited roles. They can check item out and in and do a Repository Search.

ALMA	=	VOYAGER
Resource Management	=	Cataloging
Fulfillment	=	Circulation
Repository Search	=	CAT search within the Fulfillment area (like searching for an item in Voyager Circ)
Primo	=	Pilot

Administration – to find/add/edit users (patrons)

There will be no receipt printers. Everything will be sent via email.

Offline circulation will be running from April 25 – April 27. During this time only one circulation computer should be designated for offline charges.

April 28 we will begin using ALMA live.

Juvenile books and media will both have month long loan periods in ALMA.

TO ADD A NOTE TO A PATRON RECORD:

Pull up the user record. Click on the NOTES tab. Add a note.

Do not click "External". Choose "Circulation" as note type, Add, Save.

If you want the user to be able to see the note when they log into Primo, put a check mark in the "User Viewable" box. (Example: library needs new phone number)

TO ADD A NEW USER

Find and manage users.

Add user – always chose "Public"

Password = Password1. This password is given to all new users

Check the box "Force change on next log-in" which will let them pick their own password when logging into Primo.

This user record will show that it was created internally (by library staff).

If the user is a student and the information needs to be overwritten by SIS, change the user group if needed (maybe patron was a community user and is now a student), click Toggle Account Type, continue. Record will now show "External"

SIS uploads will be happening much more frequently (daily?) and the user's account will be overwritten by SIS during the next upload.