

How to Bring Up a Patron Record and Check Items Out

This workflow guides WRLC library staff through the process of locating a patron record and checking items out in Ex Libris Alma, including both local and consortium patrons.

Required Roles

The options available under the Fulfillment menu are dependent upon your assigned user roles. Your list of options may be different than the screenshots included below. If you do not have the necessary options, you will need to work with your institution's User Administrator to be assigned the appropriate roles for your work.

To complete Fulfillment tasks outlined in this document, you must have one or more of the following roles:

- Circulation Desk Manager
- Circulation Desk Operator
- Circulation Desk Operator - Limited
- Physical Inventory Operator

1: Log in and Select Circulation Location Log into Alma and select the correct Circulation Desk location for your workstation.

Why This Matters: *The active desk determines which loan policies, printers, and analytics records apply; an incorrect desk can cause checkouts to route to the wrong library or cause print slip failure*

2: Navigate to Manage Patron Services In the left-hand menu, click Fulfillment> Checkout/Checkin> Manage Patron Services.



Welcome, Admin, WRLC

10/09/2025

Alma Production

Acquisitions

Resources

Discovery

Fulfillment

Recent Pages

Run a Job Administration

Manage Administration

In Transit Report

Open in a new window

In Transit Books within IZ

Transit Start Date

Permanent Call Number

Barcode

Title (Complete

The screenshot shows the Alma Production interface. On the left is a dark navigation sidebar with icons and labels for 'Alma Production', 'Acquisitions', 'Resources', 'Discovery', and 'Fulfillment'. The main content area has a green header with a search icon, 'Users' dropdown, and 'All' dropdown. Below the header is a list of menu items: 'Checkout/Checkin', 'Manage Patron Services' (highlighted with a red arrow), 'Return Items', 'Resource Requests', 'Pick From Shelf', 'Scan In Items', 'Expired Hold Shelf', 'Active Hold Shelf', 'Deliver Digital Documents', 'Approval Requests List', 'Monitor Requests & Item Processes', 'Course Reserves', 'Courses', and 'Reading Lists'.

- The **Patron Identification** screen will open

Patron Identification

Find user in other institution

Scan patron's ID or search for patron *

☰ Go

Use proxy

3: Locate the Patron Record Patron records can be retrieved in one of three ways:

- Scan the patron's ID barcode
- Search by patron name
- Search by identification number

If the patron is a local user, proceed to Step 8

If the patron is from another WRLC institution, continue with Step 4

4: Search for a Patron from Another Institution

- Check the <Find user in other institution box>

Patron Identification

Find user in other institution ←

Institution

Scan patron's ID or search for patron * Find User

Use proxy

- Click the dropdown arrow beside the <Institution> field to view the list of WRLC member libraries.

Patron Identification

Find user in other institution

Institution

Scan patron's ID or search for patron * Find User

Use proxy

Patron Identification

Find user in other institution

Institution

🔍 Look-up or select

Scan patron's ID or search for patron *

Use proxy

American University
American University Washington College of Law
Catholic University of America
Gallaudet University Library
George Washington University
George Washington University Himmelfarb Health Sciences Library
George Washington University Jacob Burns Law Library
Georgetown University
Georgetown University Law Library
Howard University
Marymount University
Shared storage institution
The University of the District of Columbia
University of the District of Columbia Law School

- Select the appropriate institution

Patron Identification

Find user in other institution

Institution

Howard University

Scan patron's ID or search for patron *

Use proxy

Find User

- Enter the patron's name or identification number, then click <Find User>

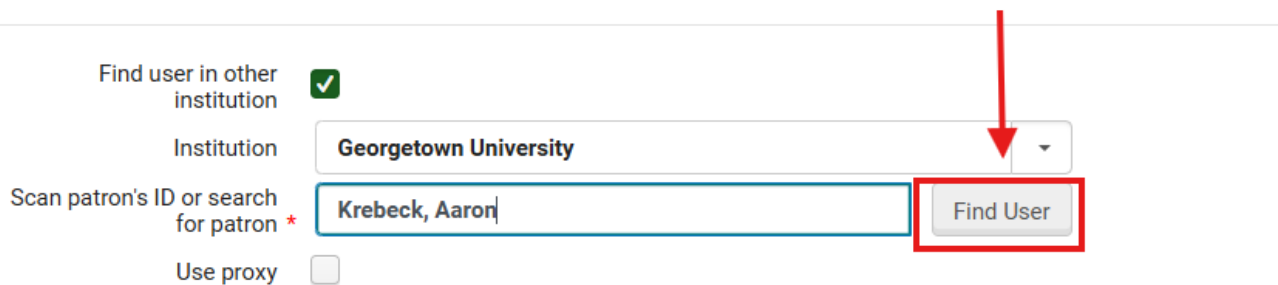
Patron Identification

Find user in other institution

Institution

Scan patron's ID or search for patron *

Use proxy



Note:

- When searching cross-institutionally, the name or ID must match exactly and must be unique within that institution; it should not apply to more than one account at that institution.
- If a patron has a common name, use their Primary ID, Institution ID, or Barcode for accuracy
- Scan IDs wherever possible instead of using typed name searches, as it reduces match failures

6: Trinity University Patrons Similar to WRLC's Health and Law professional libraries, Trinity University does not lend its materials to other WRLC institutions. However, under its WRLC agreement, Trinity University patrons may borrow from participating AFN libraries, and courier deliveries include Trinity University.

- TU patrons are expected to follow the same Circulation and Borrowing policies as fellow AFN libraries.
- To facilitate lending, TU faculty, staff and student patrons are uploaded as patrons within the SCF IZ.
- Select <Shared Storage Institution> for Trinity University patrons

Patron Identification

Find user in other institution

Institution

Scan patron's ID or search for patron *

Use proxy

- Howard University
- American University
- American University Washington College of Law
- Catholic University of America
- Gallaudet University Library
- George Washington University
- George Washington University Himmelfarb Health Sciences Library
- George Washington University Jacob Burns Law Library
- Georgetown University
- Georgetown University Law Library
- Howard University
- Marymount University
- Shared storage institution ←
- The University of the District of Columbia
- University of the District of Columbia Law School

7: Handling New or Unsaved Patron Records If the WRLC patron already exists in your Institution Zone, their record will open automatically to the Loans Loans tab, proceed to Step 8

If the patron *does not exist* locally:

- The Quick User Management screen opens.
- Verify all fields with a red asterisk (*) are filled in correctly, including expiration date, user group, and email address
- Click Update User to create a temporary local copy of the user record.

Why This Matters: *Quick User Management creates a temporary local instance of the remote record, allowing immediate checkout. This avoids unnecessary network delays and keeps circulation seamless*

8: Open the Patron's Loans Tab Once the user record loads, the Loans tab will display automatically- you are now ready to perform checkout actions.

The screenshot displays the Alma library system interface. At the top, there is a navigation bar with 'Physical items' and 'Barcode' dropdown menus, a home icon, and a search icon. On the left, a vertical sidebar contains navigation options: Alma Production, Acquisitions, Resources, Discovery, Fulfillment, Admin, and Analytics. The main content area is divided into two sections. The left section shows the patron's profile for 'WRLC, Admin' with ID 12749236380004105. It includes a 'Done' button and a list of activity counts: Loans (0), Returns (0), Requests (0), and Fines and Fees. Below this, there are sections for 'User group wrlc user' showing an active balance and accrued fines of 0.00 USD, 'System notes' (none found), and 'User notes' with a 'Manage notes' link. The right section is titled 'Loans' and features a search bar with 'My institution' and 'Scan Item Barcode' options, an 'OK' button, and a '+ Create Item' button. Below the search bar, there is a filter dropdown set to 'This Session' and a 'Clear All' button. The main area of the Loans list is empty, displaying a message: 'No records were found.' with a list icon.

9: Check Out Items to the Patron Items may be checked out using one of the following methods:

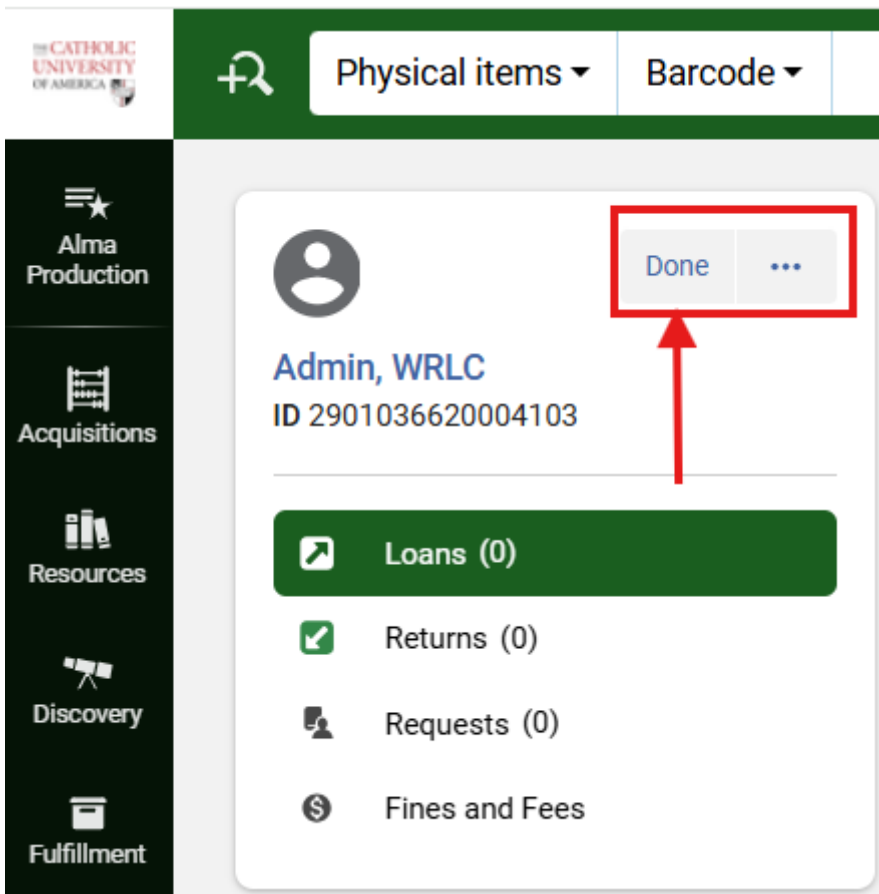
- Scan the item's barcode (recommended)
- Manually enter the barcode
- Search for the item in the catalog

Once the item is identified, click OK to confirm the checkout. The item will appear under the patron's Loans list.

Note: You are strongly encouraged to scan physical item barcodes to ensure Alma recognizes the correct copy and location. Manual entry increases the chance of transposition errors

10: Complete the Session When all items have been checked out, click Done to close the patron record and end the session.

Why This Matters: *Closing the session resets the workstation for the next user and prevents accidental checkouts under the wrong patron name.. This is particularly critical in shared circulation environments*



Frequently Asked Questions

- *What if a patron from another WRLC library cannot be found using <Find user in other institution>?*
 - Check spelling and capitalization. If still unsuccessful, verify the institution selected. If unresolved, contact the patron's library for assistance; WRLC.org> Programs> Services Portal> WRLC Library Staff Intranet> Categories> Resource Sharing> [Consortium Loan Services \(CLS\) Contact List](#)
- *Can temporary local users borrow electronic materials?*
 - No. Quick User records enable physical loans only. E-resource access remains tied to the patron's home institution.
- *What happens if I check out an item under the wrong patron?*
 - The transaction must be manually reversed by returning the item and re-checking it out under the correct account.
- *Are checkout rules (loan length, renewal limits) the same for all WRLC patrons?*
 - No. They depend on each library's Fulfillment Unit Rules and Patron Group Policy; WRLC.org> WRLC Intranet> Categories (upper right hand menu ribbon)> Policies and Documentation> [Borrowing and Consortium Loan Service \(CLS\) Policies](#)

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