

## PolyConnect Alma Training

Open a browser, click on the **ALMA** bookmark in the bookmarks bar:

**ALMA** <http://onesearch.calpoly.edu/alma>

### Login:

- **User ID & Password** are your Cal Poly portal credentials.
- **Sign out** (right click on your name) when done and **CLOSE BROWER WINDOW!**
- The main Alma menu is the **blue Alma box** at the top of the page (click on the down arrow).

### Patron records and information about patron account:

- Viewing patron information (loans, fines, notes, blocks, etc.)
  - **ALMA Menu** → **FULFILLMENT** → **Manage Patron Services**
  - Change Loan Display to **All** to see all items that are checked out.
  - Click on Active Balance, Notes, if needed

### Loans (Check out items):

- Go to **ALMA Menu** → **FULFILLMENT** → **Under Checkout/Checkin** → **Manage Patron Services**
- Scan patron barcode
- Scan item barcode
  - Pop up note lists what pieces to check for
  - Check that all pieces are present and show patron
  - Confirm
- You must click on **Done** to finish the transaction
- An email is automatically sent to the patron telling them that they checked out that item. Make sure to tell the patron that this will happen.

### Returns (Check-in items):

- Go to **ALMA Menu** → **FULFILLMENT** → **Under Checkout/Checkin** → **Return Items**
- Scan item barcode
  - Pop up note listing what pieces to check for
  - Check that all pieces are present
  - Confirm
- Again an email will be sent to the patron saying that the item has been returned

### Inventory Checklist Report (For closing shifts):

- To run the inventory report half an hour before closing:
  - While logged into ALMA, go to **Alma Menu** → **Administration** → **Manage Sets**
  - Click on **Public Sets**, find the **POCO Inventory List**. Click on the **Actions** button, then click on **Results**
  - A list will generate, but you need the Excel version so right click on **Tools** and then click on **Excel**. It will download below. Minimize the browser to show the desktop.
  - Then go to the green shortcut on the desktop called **PocoList.exe**. Click on it and the temp downloads file will open. Scroll down to the bottom of the Temp file to a document called **results.xlsx** and click **Open**. A pop-up will say **Generating List...One Moment...**
  - Once it loads, then print the **Inventory List**. A copy of this list will appear on the desktop in case you need to reprint it. That copy will disappear once the computer restarts.