

Alma Essentials: Fulfillment

HOLD SHELF

Hello, in the last two sessions you learned how to create pick slips and scan in requested items. In this tutorial you will learn how to manage the hold shelf including active and expired items.

Once an item is scanned in at the destination circulation desk, as you saw in the last session, the item is placed on the hold shelf. To see active holds, you'll go to Fulfillment > Active Hold Shelf.

You can sort the Active hold shelf list by: Requester Name, Requester ID, Title of Item, Call Number, Hold Shelf Expiry Time – which is when the hold will expire, and Hold Shelf Placement time – which is when the item was originally placed on the hold shelf. Let's filter by "Hold Shelf Expiry Time".

If you have the Requests Operator role you will have the ability to update the Expiration date by clicking "Update Expiry", as well as "Cancel Request", and "Mark as Missing".

Please note that if the item is not checked out before the hold shelf expiry date, it will still appear on the Active Hold Shelf list and can be checked out to the requesting patron.

You now need to determine which hold shelf items have expired and need to be pulled. You'll go to Fulfillment > Expired Hold Shelf.

Each expired item will appear in a tab that indicates its next step: Reshelve, Send to Circulation Desk, Send to Library, and Activate Next, assuming the patron does not check out the item in the meantime. Now you can use the "Sort by" drop down and select "Requester Name". Click each tab that has a number shown for any items that need to be pulled.

The Reshelve tab shows all expired requests for items belonging to the current circulation desk for which there are no other requests.

The Send to Circulation Desk tab contains expired requests for items that need to be transferred to a different circulation desk in the same library, either for reshelving or to be placed on the hold shelf there for the next patron in the queue. This list is empty because there are no other circulation desks for an item to be transferred to at the Main Library where you are currently working.

The Send to Library tab contains expired requests for items that need to be put in transit to a different library, either to be reshelved or placed on the hold shelf.

And lastly, the Activate Next tab contains expired requests that have a queued request to be fulfilled at the current circulation desk.

Now you'll go pull the items that appear on these tabs from the hold shelf.

Once you have the expired items in hand, in order to move them to their next destination either to be reshelved, placed in transit, or put on hold for the next patron you can use the "Scan In Items" page, that you learned about in the last session, by going to Fulfillment > Scan in items.

Simply scan or enter in the barcode, and the next step for the expired item will be shown on screen.