

Alma Essentials: Fulfillment

BOOKING REQUESTS MANAGEMENT

Hello, in the last session you learned what booking requests are and how to create a request on behalf of a patron. In this tutorial you learn how to monitor and view current requests, as well as how to manage specific requests.

You can monitor Booking Requests by going to Fulfillment > Monitor Requests and Item Processes.

Once the page loads you can use the facets to filter to only see Booking Requests. Here you can view, edit or cancel any active requests.

Now you need to fulfill a booking request for a patron. You'll go to Fulfillment > Manage Patron Services... and enter in your patron's barcode or search for their user record. Once their account opens, click on the "Requests" tab. Here you can see all of their active requests; and individual requests can be cancelled or edited to change the start and end date and time. If needed, you can use the drop down menu to filter to only see a particular type of request.

To fulfill the request you'll go to the "Loans" tab, and scan in the item. The book is now checked to Sarah, just like any other loaned item, however, the due date is the end date and time of the booking request.

The item can be returned as any other loaned item would be, by scanning it in on the Returns tab in the patron's account... or by going to "Fulfillment" > "Return Items".

Items with a booking request cannot be loaned or requested by another patron during the booking period. For example if you go back to the "Loans" tab and try to check out an item to Sarah that has an existing Booking Request on it, Alma will display a "Loan blocked" error.

However, if an item is checked out before a booking request period, but with a due date that would normally end during a booking timeframe, a "Loan blocked" message will appear with the ability to override with a shortened due date.