



Managing the Active and Expired Hold Shelves

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Agenda


- Why you need to manage hold shelves
- Roles needed to manage hold shelves
- Types of holds on hold shelf lists
- Hold Shelf settings
- Managing the Active Hold Shelf
- Managing the Expired Hold Shelf

Why Do I Need to Manage My Hold Shelves?

- All holds have expiration dates
- Alma does not automatically delete holds once they expire
- Expired holds need to be manually deleted
- Users will sometimes need you to extend hold periods

Roles Needed to manage Hold Shelves

- Role needed: **Requests Operator**
- Must be scoped to library and circulation desk



SUNY, SLC i v

ID	slc	Account Type	Internal	Identity Service	Used
Record type	Staff	User group	Faculty/Staff		

Role information v

Role name	Requests Operator	Scope	Peter J. Cayan Library, SUNY Polytechnic Institute v
Status	Active v	Expiry Date	<input type="text"/> 📅

Role parameters v

[+ Add Circulation Desk](#) 🔗 ⚙️

Name	
1	Default Circulation Desk ⋮

Types of Holds

- Local Hold Requests
- Resource Sharing Requests
- Both types of holds appear in the hold shelf lists
- Hold Shelf lists do not display hold type, but you can tell local holds from resource sharing holds by looking at barcode and location

Hold Shelf Settings

- Hold Shelf settings configured in General Details tab of Circulation Desk
- Configuration done at library level, not institution level
- Configuration | Fulfillment | Library Management | Circulation Desks

Hold Shelf Settings

- **Has Hold Shelf:** determines whether items can be held at the circulation desk
- **Hold Shelf Sorting:** determines the order in which holds are displayed in the Hold Shelf lists
- **Maximum time on hold shelf:** determines the number of days an item is kept on hold
- **Has hold shelf processing:** determines whether an item is placed on hold immediately after being scanned in
- **Notify patron of canceling expired hold:** determines whether the user is notified when a hold expires

Hold Shelf Settings

Hold Shelf Information

Has hold shelf	<input checked="" type="checkbox"/>
Hold shelf sorting	<input type="text" value="Requester Name"/>
Maximum time on hold shelf (Days)	<input type="text" value="7"/>
Has hold shelf processing	<input checked="" type="checkbox"/>
Notify patron of canceling expired hold	<input type="checkbox"/>

Hold Shelf Settings

- Hold Shelf Period also defined in Request TOUs
- Alma will look at both TOU Hold Shelf Period and the circulation desk's Maximum Time on Hold Shelf setting and use the lower value
- ILLiad borrowing requests use the item's due date as the hold until date, not the number of days listed in the Maximum time on hold shelf setting
- You can change this by changing the **ignore_lender_due_date** setting from false to true, but that will cause all ILLiad borrowing requests being given your standard RS loan period in Alma (Configuration | Fulfillment | General | Other Settings)

Managing the Active Hold Shelf

- Shows a list of all active holds at a particular circulation desk
- Expired holds are included
- You will need to be logged into that circulation desk to see its active holds
- Navigate to Fulfillment | Resource Requests | Active Hold Shelf
- Allows you to cancel requests, update the expiry date, and declare items missing

Managing the Active Hold Shelf




< Active Hold Shelf Items

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Active Hold Shelf Items

Sort by: Requester Name ▾ 1 - 3 of 3



- | | | | | |
|---|---|--|--------------------------|--|
| 1 |  <p>The Beatles / by Hunter Davies.
Barcode: 30264001621149
Location: Peter J. Cayan Library, SUNY Polytechnic Institute - CIRCULATING COLLECTION
Call Number: ML421.B4 D38 1978
Material Type: Book</p> | Held For: Jackson, Timothy
Preferred Identifier: tj0807
Held Since: 01/27/2020
Held Until: 01/21/2020 | Place in Queue: 0 | Cancel Request Update Expiry ⋮ |
| 2 |  <p>All together now : the first complete Beatles discography, 1961-1975 / by Harry Castleman & Walter J. Podrazik.
Barcode: 302691093422+
Location: Peter J. Cayan Library, SUNY Polytechnic Institute - CIRCULATING COLLECTION
Call Number: ML156.7.B4 C36 1976
Material Type: Book</p> | Held For: Jackson, Timothy
Preferred Identifier: tj0807
Held Since: 01/27/2020
Held Until: 02/03/2020 | Place in Queue: 0 | Cancel Request Update Expiry ⋮ |
| 3 |  <p>The girl who sang with the Beatles, and other stories.
Barcode: 302691040660.
Location: Peter J. Cayan Library, SUNY Polytechnic Institute - CIRCULATING COLLECTION
Call Number: PS3558.E479 G525
Material Type: Book</p> | Held For: Jackson, Timothy
Preferred Identifier: tj0807
Held Since: 01/27/2020
Held Until: 02/03/2020 | Place in Queue: 0 | Cancel Request Update Expiry ⋮ |



Managing the Expired Hold Shelf





- Shows a list of all expired holds at a particular circulation desk
- You will need to be logged into that circulation desk to see its expired holds
- Navigate to Fulfillment | Resource Requests | Expired Hold Shelf
- Allows you to reshelve items, transfer items to other circulation desks or libraries, activate the next hold in the queue, and mark items as missing

Managing the Expired Hold Shelf

Expired Hold Shelf Items (1 - 2 of 2) Back

Reshelve Send to Circulation Desk(0) Send to Library(0) Activate Next(1)

Select All Sort by : Additional ID Reshelve  

1 <input type="checkbox"/>		Wildflowers of the Adirondacks / by Anne McGrath with Joanne Treffs. Location: CIRCULATING COLLECTION Barcode: 302691025102V Call Number: QK177 .M3 Material Type: Book	Held For: Jackson, Timothy  Preferred Identifier: tj0807 Held Since: 01/27/2020 Held Until: 01/26/2020	Reshelve Update Expiry ...
2 <input type="checkbox"/>		The ancient Adirondacks / by Lincoln Barnett and the editors of Time-Life Books. Location: CIRCULATING COLLECTION Barcode: 3026910168845 Call Number: F127.A2 B24 1974A Material Type: Book	Held For: Jackson, Timothy  Preferred Identifier: tj0807 Held Since: 01/27/2020 Held Until: 01/26/2020	Reshelve Update Expiry ...

FAQs

- Active Hold Shelf:
 - <https://slcny.libanswers.com/faq/281639>
- Expired Hold Shelf:
 - <https://slcny.libanswers.com/faq/281684>