Managing the Active and Expired Hold Shelves

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Agenda

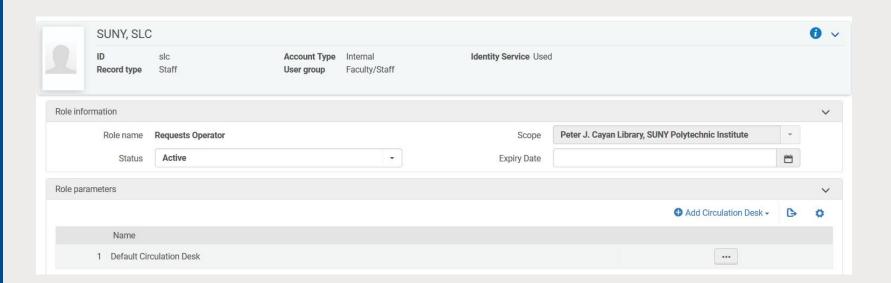
- Why you need to manage hold shelves
- Roles needed to manage hold shelves
- Types of holds on hold shelf lists
- Hold Shelf settings
- Managing the Active Hold Shelf
- Managing the Expired Hold Shelf

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

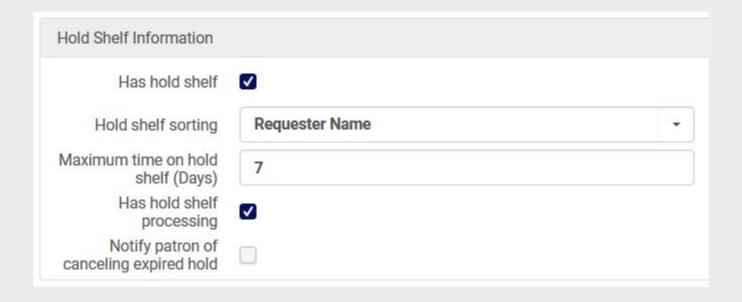


Types of Holds

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

- 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

- 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

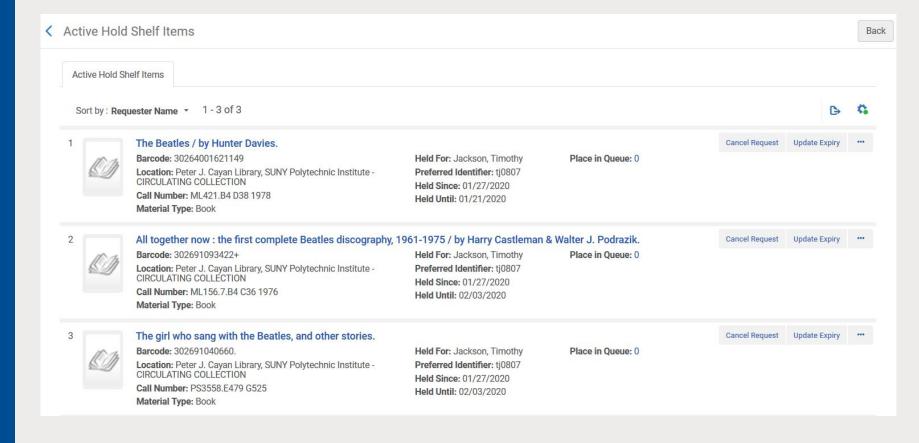


- Hold Shelf Period also defined in Request TOUs
- Alma will look at both TOU Hold Shelf Period and the circulation desk's Maximum Time on Hold Shelf setting and use the lower value
- ILLiad borrowing requests use the item's due date as the hold until date, not the number of days listed in the Maximum 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

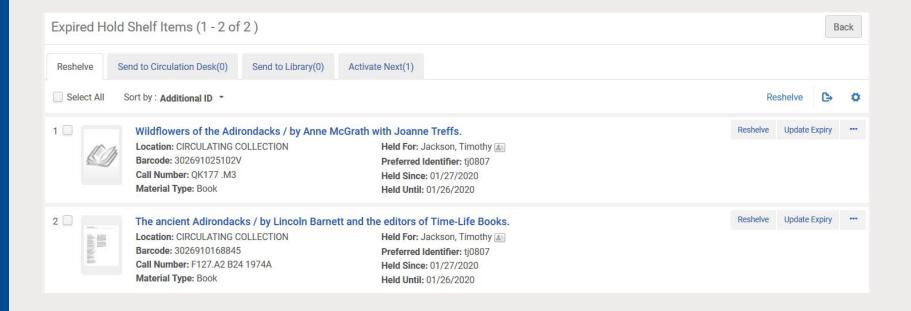
Managing the Active Hold Shelf



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



FAQs

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