

How to Manage Item Holds

This workflow explains how to process items with hold requests. It covers when to send items to the hold shelf, how to manage active and expired holds, and how to reshelve, forward, or activate subsequent requests.

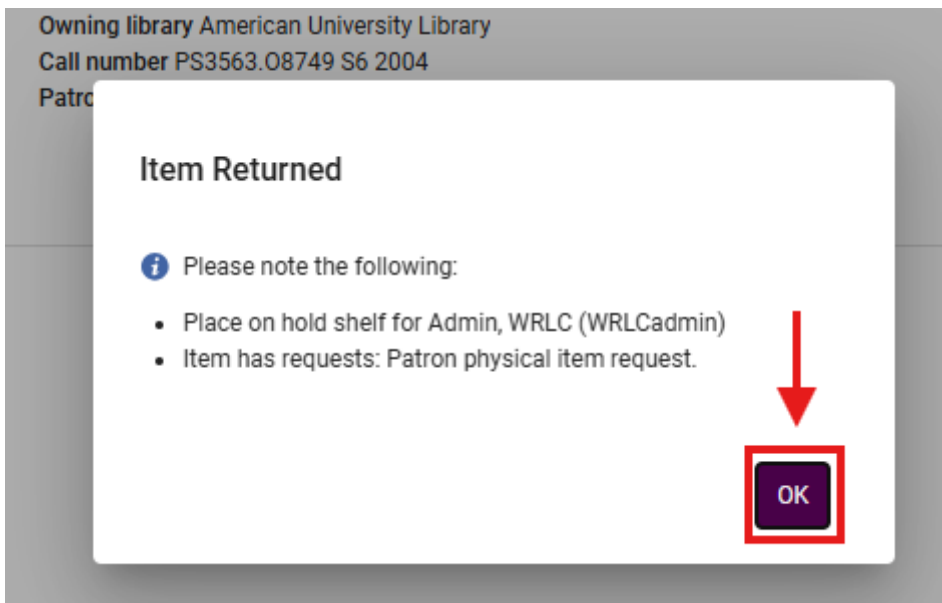
When to Reference This Document:

- When checking in items that trigger hold requests.
- When reviewing and managing materials currently on the hold shelf.
- When processing expired holds or activating next-in-line requests.

Required Roles

- Fulfillment Operator
- Circulation Desk Manager

1: Identify Items to Send to the Hold Shelf During check-in, if an item has a hold, a pop-up alert will appear indicating the destination (the hold shelf).



- Click <OK> to confirm the message and continue processing.

Why This Matters: This pop-up is Alma's prompt that a pending request exists. Routing it correctly ensures the request is fulfilled and the item doesn't re-enter general circulation.

2: Review Request Details On the Manage Item Returns screen, a <Requests> button appears next to items with active holds. The "Next step" column indicates where each item should be sent.

Manage Return Items (1 - 1 of 1)

Clear List Go to Patron Services Done

My institution Scan Item Barcode Override return date and time MM/dd/yyyy hh:mm

1 Song of Solomon / Toni Morrison ; [with a new foreword by the author].
Barcode 31194011820699
By Morrison, Toni,
Loan date 11/10/2025
Due date 11/15/2025 06:00 PM EST
Return date 11/10/2025 04:13 PM EST
Next step On Hold Shelf

Owning library American University Library
Call number PS3563.O8749 S6 2004
Patron WRLC Admin , Angeliq...
Requests (1)
Manage patron services

Work Order Change Return Date ...

- Click <Requests> to view detailed information about the hold.

3: Place the Item on the Hold Shelf After verification, place the item on your library's hold shelf following local procedures (e.g., alphabetical by patron last name or request number).

4: Manage Active Holds To view and manage all current holds, navigate to Fulfillment > Resource Requests> Active Hold Shelf> the Active Hold Shelf Items screen opens.

Alma Sandbox

Collection Development

Acquisitions

Resources

Discovery

Fulfillment

Admin

Analytics

Checkout/Checkin
Manage Patron Services
Return Items

Resource Requests
Pick From Shelf
★ Scan In Items
Expired Hold Shelf
Active Hold Shelf
Manage In Process Items
Deliver Digital Documents
Approval Requests List
Monitor Requests & Item Processes

Course Reserves
Courses
Reading Lists
Citations

Resource Sharing
Lending Requests
Borrowing Requests
Receiving Items
Shipping Items
Partners
Rota Templates

Advanced Tools - Loans
Fulfillment Configuration Utility
Bulk Change Due Dates
View Overdue and Lost Loan Jobs
Offline Circulation

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Create
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Loans

- Available actions include:
 - **Sort items:** Use the <Sort by> drop-down to reorder the list by call number, date received, or patron

Active Hold Shelf Items

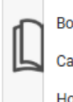
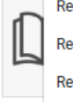

Active Hold Shelf Items

Sort by: **Title** 1 - 20 of 102

-  **18 Minutes of Midway**
Barcode: 39072040284238
Location: American University Library - rs borrowing location
Material Type: Other
-  **A cup of news : the life of Thomas Nashe / Charles Nicholl.**
Institution: Georgetown University
Barcode: 39020006255767
Location: Lauinger Library - Off-Campus Shelving
Call Number: PR2326.N3 Z78 1984
Item Call Number: R22M24S10T12 BC
Material Type: Book

Active Hold Shelf Items

Sort by: 1 - 20 of 102

-  **18 Minutes of Midway**
Barcode: 39072040284238
Location: American University Library - rs borrowing lo
-  **A cup of news : the life of Thomas Nashe / Charles Nicholl.**
Institution: Georgetown University
Barcode: 39020006255767
Location: Lauinger Library - Off-Campus Shelving
Call Number: PR2326.N3 Z78 1984
Item Call Number: R22M24S10T12 BC
Material Type: Book
-  **A lover's discourse : fragments /**
Barcode: 30239875749309
Location: American University Librarv - rs borrowina lo

- **Cancel a hold:** Click <Cancel Request> in the item line.
 - In the confirmation pop-up, choose a cancellation reason, optionally add a note, uncheck Notify user if appropriate, then click <Confirm>

Confirm Request Cancellation

Cancellation reason

Cancellation note
Booking request passed its release time

Notify user

- Cancelled at patron's request
- Cannot be fulfilled
- Date needed by has passed
- Duplicate request
- Time to pick up resource from hold shelf has passed
- Failed to locate potential suppliers
- Items moved
- Item is already available
- Item is missing
- Item is needed for Course Reserves
- Items withdrawn
- Patron no longer interested
- Library will try to purchase the resource
- Supplier rejected the request
- Request expired

Confirm Request Cancellation

Cancellation reason


Cancellation note

Notify user

Back

Held Until: 10/11/2025

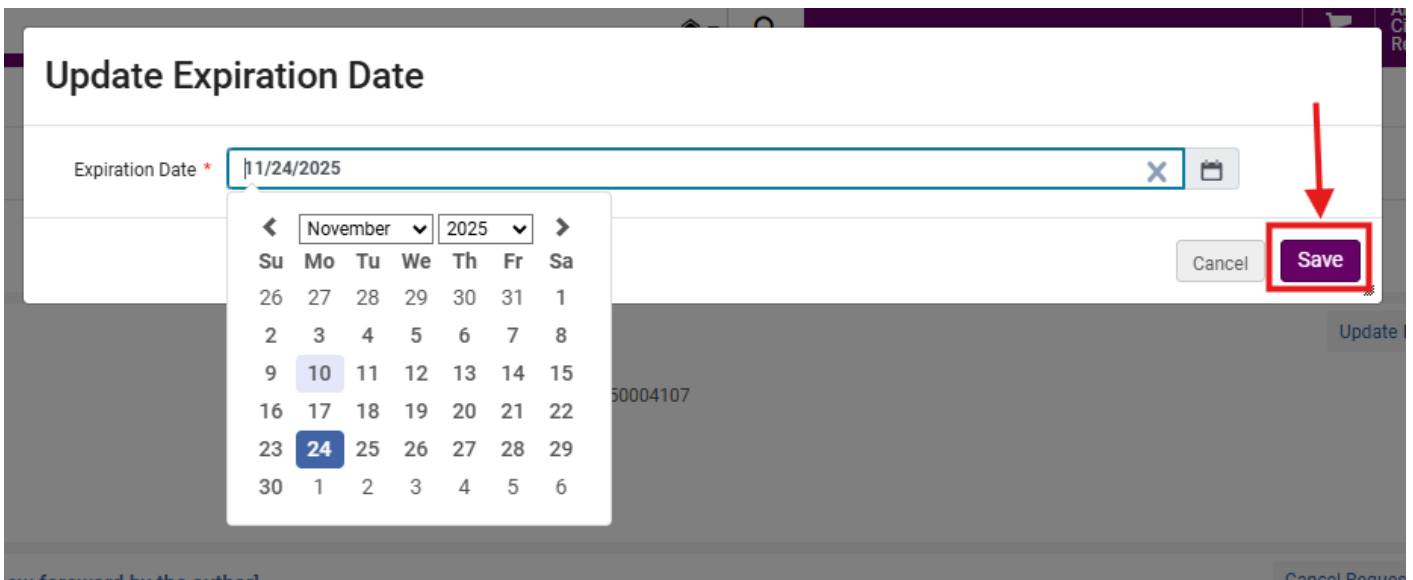
- **Change expiration date:** Click <Update Expiry>, enter or select the new expiration date, then click <Save>.

2  Song of Solomon / Toni Morrison ; [with a new foreword by the author].
 Barcode: 31194011820689
 Location: American University Library - Library Stacks
 Call Number: PS3563.O8749 S6 2004
 Material Type: Book

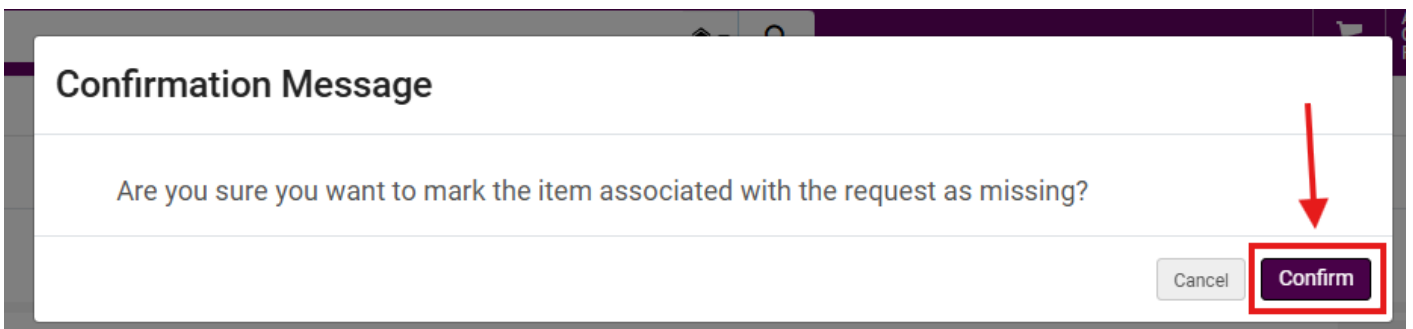
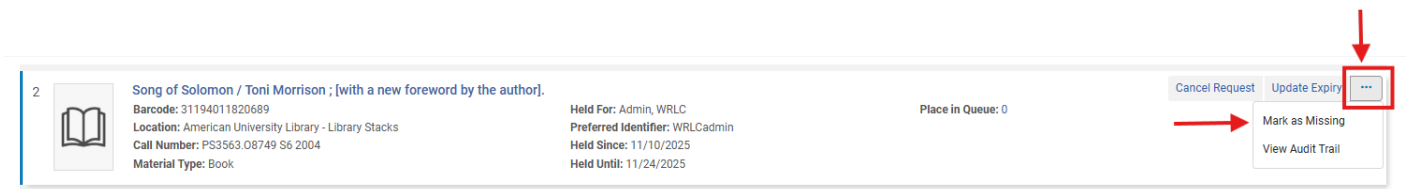
Held For: Admin, WRLC
 Preferred Identifier: WRLCadmin
 Held Since: 11/10/2025
 Held Until: 11/24/2025

Place in Queue: 0

Cancel Request ...



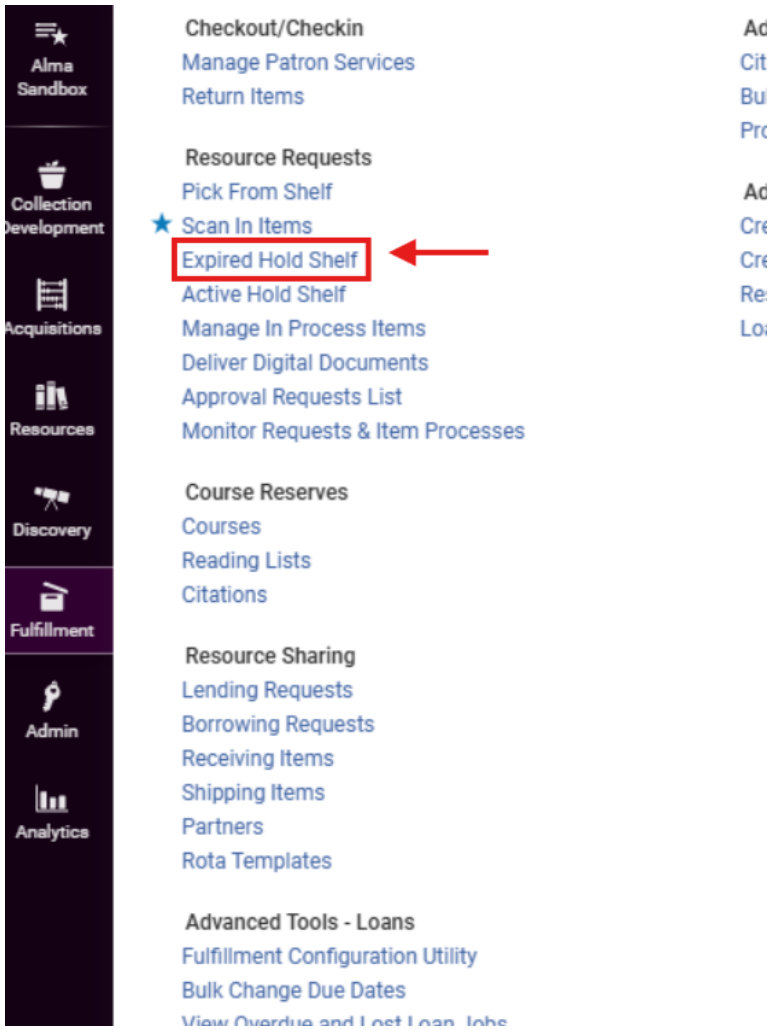
- **Mark as missing:** From the row action menu ellipses (...), select <Mark as Missing>, then click <Confirm> in the pop-up message.



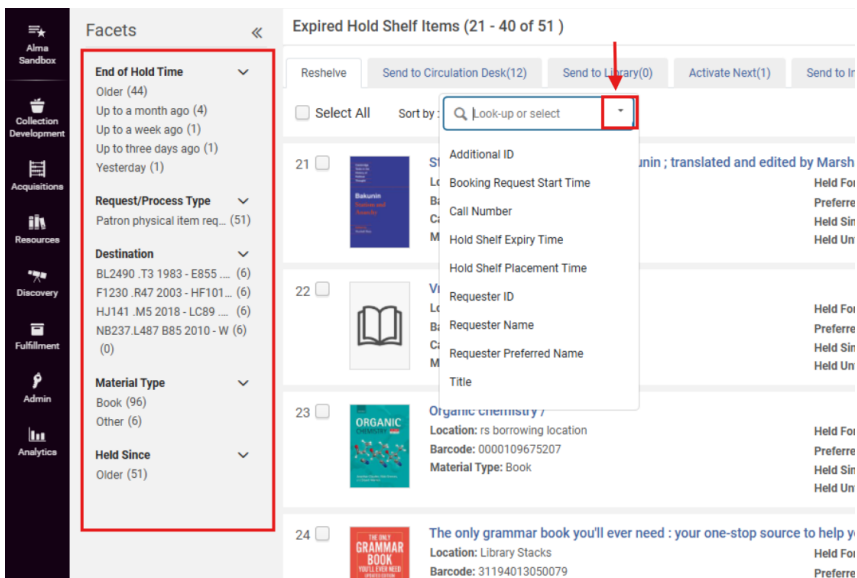
5: Manage Expired Holds

Navigate to Fulfillment > Resource Requests> Expired Hold Shelf

- The Expired Hold Shelf Items screen opens, showing items whose hold period has lapsed.



- Available actions include:
 - **Sort or filter:** Use Facets or the <Sort by> drop-down to organize items.




- **Reshelve:** Click <Reshelve> for individual items

Expired Hold Shelf Items (21 - 40 of 51) Back

Reshelve Send to Circulation Desk(12) Send to Library(0) Activate Next(1) Send to Institution (38)

Select All Sort by: Requester Name Reshelve 📄 ⚙️




21		Statism and anarchy / Michael Bakunin ; translated and edited by Marshall S. Shatz. Location: Library Stacks Barcode: 31194011468836 Call Number: HX833 .B317513 1990 Material Type: Book	Held For: ██████████ (A) Preferred Identifier: ██████████ Held Since: 07/31/2025 Held Until: 08/14/2025	Reshelve Update Expiry ⋮
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- or select multiple items using check boxes and click the primary <Reshelve> button; this updates item status from On Hold Shelf to Item in Place

Facets Expired Hold Shelf Items (21 - 40 of 51) Back

Reshelve Send to Circulation Desk(12) Send to Library(0) Activate Next(1) Send to Institution (38)

Select All Sort by: Requester Name Reshelve 📄 ⚙️



2		Statism and anarchy / Michael Bakunin ; translated and edited by Marshall S. Shatz. Location: Library Stacks Barcode: 31194011468836 Call Number: HX833 .B317513 1990 Material Type: Book	Held For: ██████████ (A) Preferred Identifier: ██████████ Held Since: 07/31/2025 Held Until: 08/14/2025	Reshelve Update Expiry ⋮
2		Vremia Andropova / Nikita Petrov. Location: Library Stacks Barcode: 31194013193648 Call Number: DK275 .A53 P48 2023 Material Type: Book	Held For: ██████████ (A) Preferred Identifier: ██████████ Held Since: 08/09/2025 Held Until: 08/23/2025	Reshelve Update Expiry ⋮
2		Organic chemistry / Location: rs borrowing location Barcode: 0000109675207 Material Type: Book	Held For: ██████████ (A) Preferred Identifier: ██████████ Held Since: 04/21/2025 Held Until: 08/05/2025	Reshelve Update Expiry ⋮

- **Update expiration date:** Click <Update Expiry>, choose a future date, and click <Save> to extend the hold.

Facets Expired Hold Shelf Items (1 - 20 of 51) Back

Reshelve Send to Circulation Desk(12) Send to Library(0) Activate Next(1) Send to Institution (38)

Select All Sort by: Requester Name Reshelve 📄 ⚙️

1		The literature review : a step-by-step guide for students / Diana Ridley. Location: Library Stacks Barcode: 3119400994934 Call Number: LB2369 .R525 2008 Material Type: Book	Held For: ██████████ (A) Preferred Identifier: ██████████ Held Since: 07/29/2025 Held Until: 08/12/2025	Reshelve Update Expiry ⋮
2		Family properties : race, real estate, and the exploitation of Black urban America / Beryl Satter.		Reshelve Update Expiry ⋮

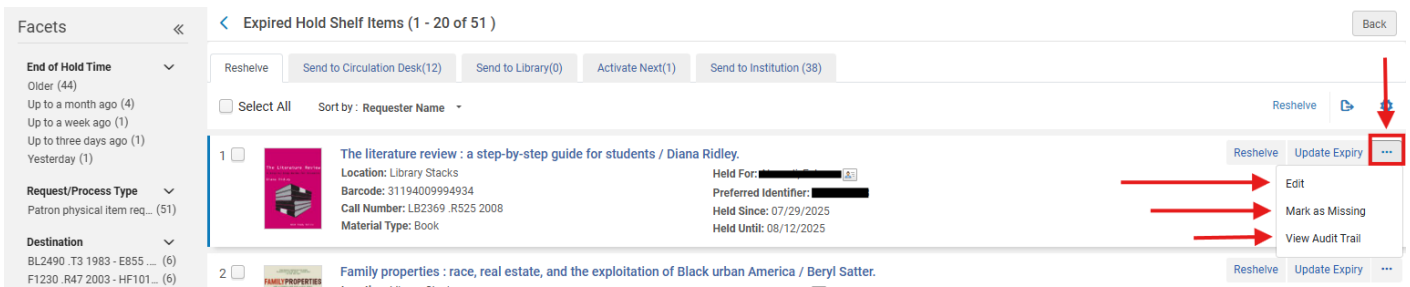
Update Expiration Date

Expiration Date * Cancel Save

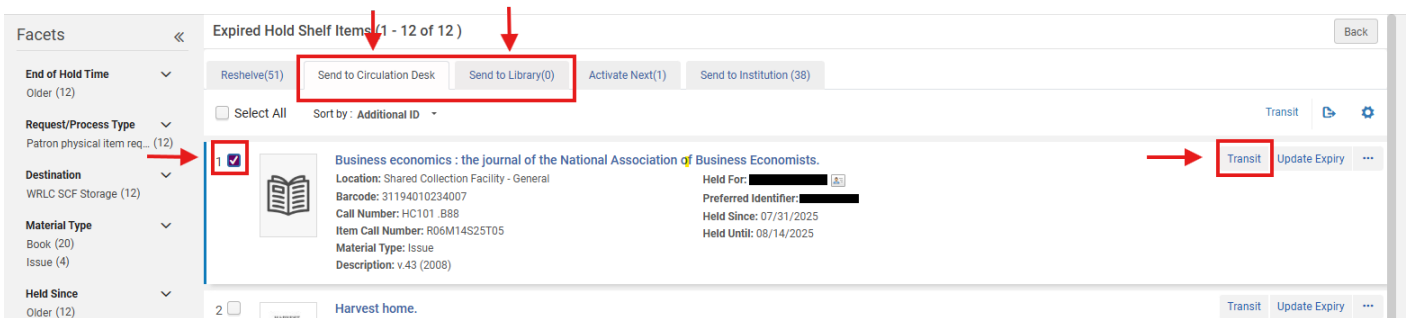
<	August	>	2025	<		
Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

- **Additional actions:** From the row action menu (⋮), you can:
 - Edit the hold record
 - Mark the item as missing

- o View the audit trail



- **Forward items:** Items needing transfer to another desk or library will appear under <Send to Circulation Desk> or <Send to Library> tabs.
 - o Similar to the <Reshelve> function, Click <Transit> to initiate the transfer.



- **Activate the next hold:** Items with queued requests appear under the <Activate Next> tab.
 - o Select the item(s) and click <Activate Next> to process the subsequent request.



Frequently Asked Questions

- *When should I send an item to the hold shelf?*
 - o Whenever the pop-up during check-in or the “Next step” field directs you to do so.
- *What if the pop-up doesn't appear but a request exists?*
 - o Verify the item's process type in <Manage Item Returns>. If the <Requests> button appears, follow its guidance to route correctly.
- *Can I cancel a hold from the Active Hold Shelf screen?*
 - o Yes. Click <Cancel Request>, choose a reason, and confirm. Alma logs all cancellations for audit tracking.
- *How long do items remain on the hold shelf?*
 - o Until the expiration date passes. The date is determined by your fulfillment configuration and can be extended via <Update Expiry>.
- *What should I do with items under the Expired Hold Shelf that patrons never collected?*

- Reshelve them, forward them to the appropriate location, or activate the next hold using the corresponding tab.
 - *What if a held item goes missing?*
 - From the row action menu (⋮), select <Mark as Missing>. This updates Alma's status and removes it from the hold queue.
 - *Will Alma notify patrons when a hold is ready?*
 - Yes. Alma automatically sends pickup notices through the Fulfillment notification job when items move to the hold shelf.
 - *Can I view previous hold shelf actions?*
 - Yes. Use <View Audit Trail> from the row action menu (⋮) to review routing and cancellation history.
 - *How do I handle items that need to move between WRLC libraries?*
 - Use <Transit> under <Send to Library> or <Send to Circulation Desk> tabs to ensure correct cross-institution delivery.
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Revision #2

Created 10 November 2025 21:04:29 by Angelique Carson

Updated 19 November 2025 15:18:30 by Angelique Carson