Equipment and Booking

GU currently has three collections of audiovisual equipment in Alma and uses booking for one collection of equipment and also our Digital Media Studio room reservations.

This documentation includes the cataloging, fulfillment policies, and suggested workflows from our internal staff wiki.

- Configurations
- Terms of Use and Rules
- Booking request creation
- Booking workflows for staff
- Equipment cataloging
- Resources

Configurations

Initial setup pieces like cataloging template, local thumbnail configuration, and custom resource type setup.

Alma Setup

Booking-related parameters

Configuration > Fulfillment > General > Other Settings

- allow_same_day_booking : false (not the default)
- enable_booking_workflow : true (this is the default)

Cataloging

Equipment

New location: steq - Stacks Equipment (assigned to the Short Loan Fulfillment Unit)

Digital Media Studios

New location: studios - Digital Media Studios (assigned to the Short Loan Fulfillment Unit)

New item policy: Studio

Equipment Bib record template

The LDR and 008 values were from the existing Books template, so it's not properly correct from a cataloger point of view. These records are saved to our IZ only and not shared with the NZ.

245 10 $$a [name of the equipment]
500 __ $$a [any notes/descriptive information about brand/model/etc. that you want in the record to help patrons find it and know they have the right thing]
956 42 $$u [URL of a thumbnail image; if you don't have one, delete this field]
996 __ $$a equipment

Fulfillment

New Overdue and Lost Loan Profiles

Specifically for the Stacks Equipment location and Equipment item policy

- Overdue notices at 1 day & 6 days overdue
  - 1 Day overdue also applies "Overdue Item" block to the patron's account
- Lost at 7 days overdue
  - When the item becomes lost the Overdue block is removed but the patron is now blocked due to owing the replacement cost

For Studios: Lost Loan Profile

Name : Lost Lau Studio Key
Description : Lost if not returned before close
Active : Yes
Profile Type : Change to lost
Create Overdue Notification Fee : No
Days After Due Date : 0 Days
Days After Status Date : 0 Days
Loan Status : [blank]
User Group : [blank]
Library : Lauinger Library
Locations : Lauinger Library - Digital Media Studios (studios)
Item policy : [blank]
Material Type : [blank]
Letter send format : Mail

Request Pickup Configuration

Name: Booking requests for Digital Media Studios
Input Parameters:
Request Type = Booking
Location = Lauinger Library - Digital Media Studios

Output Parameters:

- Consider as missing when expired = Never
- Show in 'Pick From Shelf' list = False
- Expiry time for 'Pick From Shelf' (in days) = -
- Calculate expiry time in open days = No

--

Name: Booking requests for Lau Equipment
Input Parameters: Request Type = Booking

Output Parameters:

- Consider as missing when expired = Never
- Show in 'Pick From Shelf' list = True
- Expiry time for 'Pick From Shelf' (in days) = 3
- Calculate expiry time in open days = Yes

Process Type Exception rules

Added at the top of the list of Booking rules to prevent requests on lost/missing items

Name: missing exception for studios
Description: prevent bookings on missing keys

Input Parameters:

- Location = Lauinger Library - Digital Media Studios
- Process Type InList Lost, Lost and paid, Missing

Output Parameters: Default terms of use (not bookable)

--

Name: process type exception [equipment]
Description: prevent bookings on lost/missing items

Input Parameters:

- Process Type InList Lost, Lost and paid, Missing
- Location = Lauinger Library - Stacks Equipment

Output Parameters: Default terms of use (not bookable)

Request Reminder Notice

We've adapted the Ful Requests Report Letter to send a daily reminder to patrons of their upcoming reservations for equipment and our digital media studios.

Configuration > Fulfillment > General > Fulfillment Jobs Configuration > Requests - Send report job, select all request types:

- Non active requests
- Requests in process
- Requests on hold shelf

> The requests letter XSL includes a terminate clause for non-booking requests, so the job always reports "Completed with Errors"

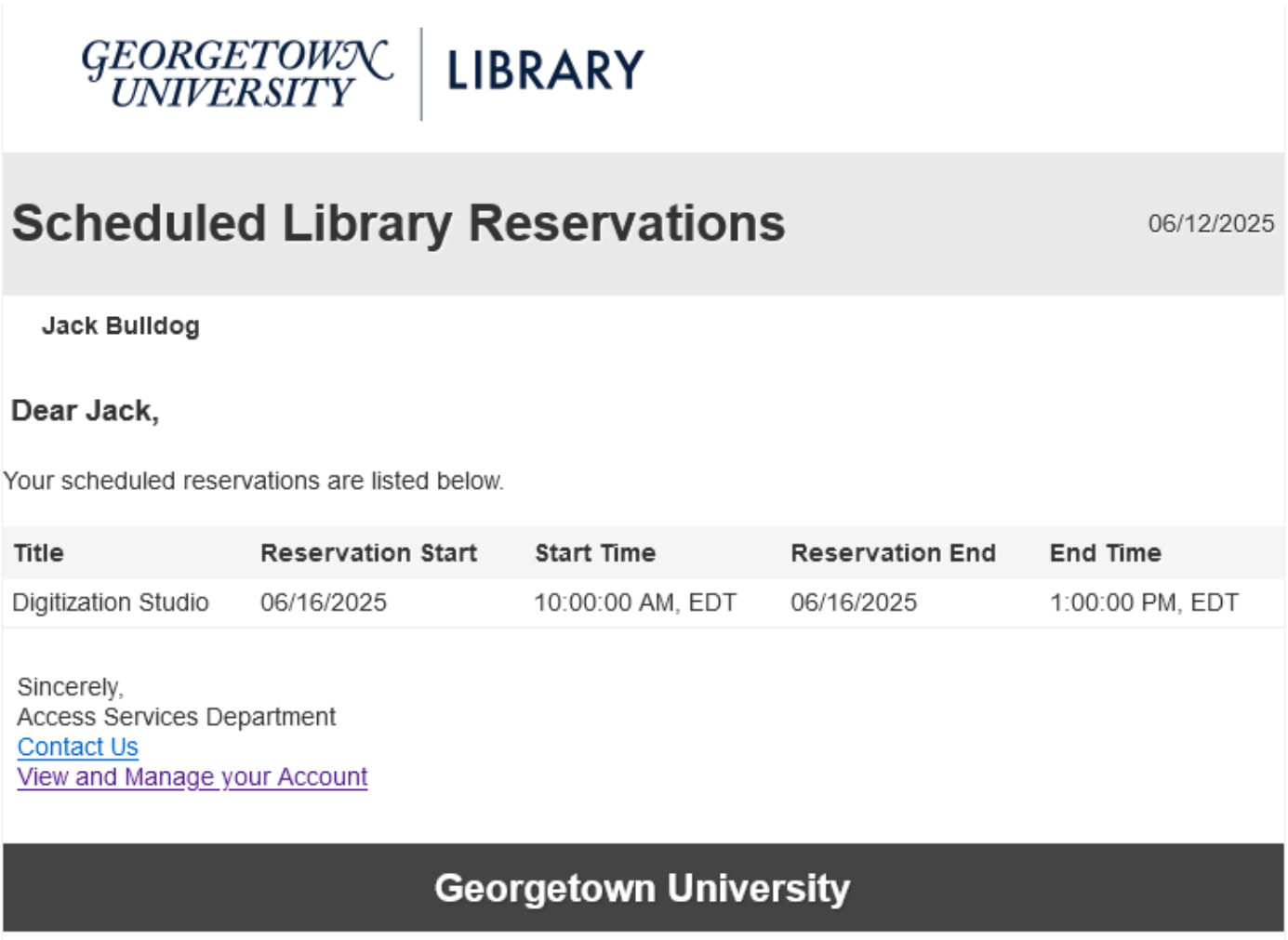
Letter XSL was heavily customized to remove the distinctions between types of requests and list the requests by start date/time.

Ful Requests Report Letter full XSL

```
<?xml version="1.0" encoding="utf-8"?>

<xsl:stylesheet version="1.0"
xmlns:xsl="http://www.w3.org/1999/XSL/Transform">

<xsl:include href="header.xsl" />
<xsl:include href="senderReceiver.xsl" />
<xsl:include href="mailReason.xsl" />
<xsl:include href="footer.xsl" />
<xsl:include href="style.xsl" />

<xsl:template match="/">
   <html>
         <xsl:if test="notification_data/languages/string">
            <xsl:attribute name="lang">
               <xsl:value-of select="notification_data/languages/string"/>
            </xsl:attribute>
         </xsl:if>

      <head>
            <title>
               <xsl:value-of select="notification_data/general_data/subject"/>
            </title>

      <xsl:call-template name="generalStyle" />
      </head>

      <body>
         <xsl:attribute name="style">
            <xsl:call-template name="bodyStyleCss" /> <!-- style.xsl -->
         </xsl:attribute>
```

```
            <xsl:call-template name="head" /> <!-- header.xsl -->
            <xsl:call-template name="senderReceiver" /> <!-- SenderReceiver.xsl -->

            <xsl:call-template name="toWhomIsConcerned" />
            <div class="messageArea">
            <div class="messageBody">
<!-- Don't send notice for non-booking requests  -->
<xsl:choose>
<xsl:when test="(notification_data/non_active_requests/ful_request_interpated/request_type =
'BOOKING') or (notification_data/process_requests/ful_request_interpated/request_type
='BOOKING') or (notification_data/hold_shelf_requests/ful_request_interpated/request_type
='BOOKING')">
            <h>@@please_find_below@@</h>
</xsl:when>
<xsl:otherwise>
<xsl:message terminate="yes">this is not a booking request!</xsl:message>
</xsl:otherwise>
</xsl:choose>
            <br />
            <br />
            <table role='presentation'  cellspacing="0" cellpadding="5" border="0"
class="listing">
                <xsl:attribute name="style">
                   <xsl:call-template name="mainTableStyleCss" />
                </xsl:attribute>
                <tr>
                  <xsl:attribute name="style">
                      <xsl:call-template name="headerTableStyleCss" /> <!-- style.xsl -->
                   </xsl:attribute>
                            <th>@@title@@</th>
                            <th>Reservation Start</th>
                            <th>Start Time</th>
                            <th>Reservation End</th>
                            <th>End Time</th>
                </tr>
                   <xsl:for-each
select="notification_data/hold_shelf_requests/ful_request_interpated|notification_data/process_
requests/ful_request_interpated|notification_data/non_active_requests/ful_request_interpated">
                      <xsl:sort select="start_time" />
                      <xsl:if test="request_type='BOOKING'">
                <tr>
                      <td><xsl:value-of select="title_display"/></td>
                      <td><xsl:value-of select="start_time"/></td>
                      <td><xsl:value-of select="booking_start_time"/></td>
```

```
                    <td><xsl:value-of select="end_time"/></td>
                    <td><xsl:value-of select="booking_end_time"/></td>
                </tr>
                </xsl:if>
                  </xsl:for-each>
              </table><br />
            <table>
              <tr><td><xsl:call-template name="signature" /></td></tr>
            </table>
              </div>
              </div>
            <xsl:call-template name="lastFooter" /> <!-- footer.xsl -->
          </body>
      </html>
</xsl:template>

</xsl:stylesheet>
```



GEORGETOWN UNIVERSITY | LIBRARY

Scheduled Library Reservations

06/12/2025

Jack Bulldog

Dear Jack,

Your scheduled reservations are listed below.

Title	Reservation Start	Start Time	Reservation End	End Time
Digitization Studio	06/16/2025	10:00:00 AM, EDT	06/16/2025	1:00:00 PM, EDT

Sincerely,
Access Services Department
Contact Us
View and Manage your Account

Georgetown University

On Hold Shelf notice booking-specific text for equipment

required WRLC ticket, as the On Hold Shelf Letter is controlled centrally

```
<xsl:when test="contains(notification_data/request/delivery_address, 'Lauinger')">

<xsl:choose>

<xsl:when test="contains(notification_data/request/request_type, 'BOOKING')">

Your booked item will be held until the circulation desk closes on your requested pick up day.

</xsl:when>

<xsl:otherwise>

     @@note_item_held_until@@ <xsl:value-of
select="notification_data/request/work_flow_entity/expiration_date"/>.

</xsl:otherwise>

</xsl:choose>
```

Loan and Booking Terms of Use

(see Terms of Use page for details)

Loan Receipt studio-specific text

(excerpt from the full Loan Receipt Letter)

```
      <xsl:if
test="(/notification_data/loans_by_library/library_loans_for_display/item_loans/overdue_and_lost_loan_notification_display/item_loan/physical_item/item_policy='studio')">
          <tr><td bgcolor="yellow">
NOTE: You will be charged for any damage to the room and/or any items removed from the space. If there is any damage to the space, or missing equipment, at the start of reservation, please report it to digitalscholarship@georgetown.edu immediately to avoid being charged.<br/>
          </td></tr>
       </xsl:if>
```

(then comes the list of loaned items)

Primo Configurations

Equipment local resource type (996)

Configuration > Discovery > Display Configuration > Resource Types Configuration > Add/Edit Resource Type Configuration > Custom Local Resource Types tab

Code : equipment
Display Singular Label : Equipment
Display Plural Label : Equipment
MARC mapping : 996 $a equipment (Use Regular Expression : false)

Thumbnail template configuration (956)

Configuration > Discovery > Display Configuration > Thumbnail configuration > Add New Template

Template Name : local thumbnail
Template : $$LinkingParameter1
LinkingParameter Configuration
Field : 956 | Ind1 : 4 | Ind2 : 2 | Subfield : u
Use Field : Always
Normalization : No normalization

> This setup is the most basic possible configuration and also allows us to selectively override book cover images that are incorrect.

Labels

Configuration > Discovery > Display Configuration > Labels > Request labels

- almaRequest.startDate : Reservation Start
- almaRequest.endDate : Reservation End
- almaRequest.checkAvailiability : Check Availability Calendar [adds space between the link and the rest of the request form]
- 400307 : Same day requests cannot be accepted. Please choose a date in the future.

Considering adding a form description specifically to the booking form (almaBookingRequest.formDescription), but haven't so far.

Additional Considerations

Library Hours

The time our service desk opens varies depending on the day of the week, which caused some unexpected issues with the booking duration initially selected (3 days). This is why the booking duration currently in use for equipment is 76 hours instead of 72.

We also set our service desk hours in Alma to begin 30 minutes after staff are scheduled to arrive so that patrons aren't expecting to pick up their equipment (or check out the Digital Media Studio keys) the instant the library opens.

Title-level vs. Item-level requests

One of the goals of setting up our equipment in Alma was to allow patrons to place requests without needing to select a particular item. This also allows requests to be filled by whichever item is currently on the shelf automatically. Having it work this way REQUIRES that nothing be put into the Item Description field. As soon as you put anything in the Description, even if multiple items have the same Description, that changes the request process to be item-specific.

Terms of Use and Rules

Terms of Use and Rules used for equipment for each of the libraries: Lauinger & Capitol Campus, GU-Q (Qatar), and SCS. Lauinger & Capitol Campus are the only ones using Booking.

Lauinger & Capitol Campus

Summary: Most items are bookable (requestable for specific dates, up to 3 days at a time), all are loanable (i.e. do not require a booking to borrow the item, though bookings are recommended).

Booking (Requesting)

Equipment Hour-based Loan Items (2-Hour, 4-Hour)

Chargers, power banks, etc. = Not Bookable

Name	Operator	Value
Item Policy	In List	4-Hour Reserve, Overnight ; 2-Hour Reserve, No overnight
Location	In List	Lauinger Library - Stacks Equipment, Capitol Campus Library - Equipment
Output		Default terms of use (not bookable)

Equipment 3-Day Items

Name	Operator	Value
Location	In List	Lauinger Library - Stacks Equipment, Capitol Campus Library - Equipment
User Group	In List	Continuing Ed & Prof Development, Graduate Student, Library Staff, Non-Tenure Line Faculty, Senior, Staff, Staff/AAP Retiree, Tenure Line Faculty/Emeritus Faculty, Undergraduate
Item Policy	=	Equipment
Output		Lau Equipment 3 day Booking ToU

Equipment 3 day Booking ToU Output terms

- Booking release time : 25 Hours
- Is item bookable : Item is bookable
- Maximum allowed booking length : 3 Days(ish) Allowed (3 days + 4 hours for circ desk opening time variations)
- Preview period : 24 Hours
- Pickup locations : Pickup only in owning library
- Future limit : 30 Day Future Limit
- Back to back booking : No limit
- Purged request fee : No purged request fee
- Booking resolution : Days plus overnight
- Closed library booking management : Attempt expanding if within maximum allowed booking length

Lauinger Digital Media Studios

Name	Operator	Value
Location	=	Lauinger Library - Digital Media Studios
User Group	In List	Continuing Ed & Prof Development, Graduate Student, Library Staff, Non-Tenure Line Faculty, Senior, Staff, Staff/AAP Retiree, Tenure Line Faculty/Emeritus Faculty, Undergraduate, Visiting Researcher
Output		Lau Room 3 hour booking

Lau Room 3 hour booking Output terms

- Booking release time : No booking release time
- Is item bookable : Item is bookable
- Maximum allowed booking length : 3 Hours booking
- Preview period : 30 minutes
- Pickup locations : Pickup only in owning library
- Future limit : 30 Day Future Limit
- Back to back booking : No limit
- Purged request fee : No purged request fee
- Booking resolution : Default booking resolution - Minutes
- Closed library booking management : Adjust booking time to be during open times only. When the Library is closed during the entire requested booking period, the request will be blocked.

Loan

Equipment 2-Hour Items

Currently only used for power banks

Name	Operator	Value
Item Policy	In List	2-Hour Reserve, No Overnight
Location	In List	Lauinger Library - Stacks Equipment, Capitol Campus Library - Equipment
User Group	In List	Continuing Ed & Prof Development, Graduate Student, Library Staff, Non-Tenure Line Faculty, Senior, Staff, Staff/AAP Retiree, Tenure Line Faculty/Emeritus Faculty, Undergraduate
Output		2-Hour Lau Equipment Loan

2-Hour Equipment Loan Output terms

- Is Loanable : Loanable
- Is Recallable : No Recall
- Due Date : 2 Hours loan
- Lost Item Fine : No Lost Item Fine
- Lost Item Replacement Fee : 200.00 Lost Item Replacement Fee
- Lost Item Replacement Fee Refund Ratio : 100 Percent Lost item refund
- Maximum Fine : 70.00 Maximum Fine
- Overdue Fine : 1.00 Open Hours overdue fine
- Grace Period : No Grace
- Is Renewable : Not Renewable
- Closed Library Due Date Management : Move Due Time to Upcoming Closing Time

Equipment 4-Hour Items

e.g. charging cords

Name	Operator	Value

Item Policy	In List	4-Hour Reserve, Overnight
Location	In List	Lauinger Library - Stacks Equipment, Capitol Campus Library - Equipment
User Group	In List	Continuing Ed & Prof Development, Graduate Student, Library Staff, Non-Tenure Line Faculty, Senior, Staff, Staff/AAP Retiree, Tenure Line Faculty/Emeritus Faculty, Undergraduate
Output		4-Hour Lau Equipment Loan

4-Hour Equipment Loan Output terms

- Is Loanable : Loanable
- Is Recallable : No Recall
- Due Date : 4 Hours loan
- Lost Item Fine : No Lost Item Fine
- Lost Item Replacement Fee : 200.00 Lost Item Replacement Fee
- Lost Item Replacement Fee Refund Ratio : 100 Percent Lost item refund
- Maximum Fine : 70.00 Maximum Fine
- Overdue Fine : 1.00 Open Hours overdue fine
- Grace Period : No Grace
- Is Renewable : Not Renewable
- Closed Library Due Date Management : Move Due Time to Next Open Time

Equipment 3-Day Loan

Cameras, microphones, cables, etc.

Name	**Operator**	**Value**
Item Policy	In List	Equipment
Location	In List	Lauinger Library - Stacks Equipment, Capitol Campus Library - Equipment
User Group	In List	Continuing Ed & Prof Development, Graduate Student, Library Staff, Non-Tenure Line Faculty, Senior, Staff, Staff/AAP Retiree, Tenure Line Faculty/Emeritus Faculty, Undergraduate
Output		3-Day Lau Equipment Loan

3-Day Equipment Loan Output terms

- Is Loanable : Loanable
- Is Recallable : No Recall
- Due Date : 3 Days (Exact Days)
- Lost Item Fine : No Lost Item Fine
- Lost Item Replacement Fee : 200.00 Lost Item Replacement Fee
- Lost Item Replacement Fee Refund Ratio : 100 Percent Lost item refund
- Maximum Fine : 70.00 Maximum Fine
- Overdue Fine : 1.00 Open Hours overdue fine
- Grace Period : 1 Hour grace period
- Is Renewable : Not Renewable
- Maximum Renewal Period : 9 Day Renewal (3-day loan + 2 renewals) (Note: this allows staff discretion to renew items by overriding the ‘not renewable’ block)
- Closed Library Due Date Management : Move due time to next open time

Lauinger Digital Media Studios Loan

Name	Operator	Value
Location	=	Lauinger Library - Digital Media Studios
User Group	In List	Continuing Ed & Prof Development, Graduate Student, Library Staff, Non-Tenure Line Faculty, Senior, Staff, Staff/AAP Retiree, Tenure Line Faculty/Emeritus Faculty, Undergraduate, Visiting Researcher
Output		3-Hour Loan, No Overnight

3-Hour Loan, No Overnight Output terms

- Is Loanable : Loanable
- Is Recallable : No Recall
- Due Date : 3 Hours loan
- Lost Item Fine : No Lost Item Fine
- Lost Item Replacement Fee : 200.00 Lost Item Replacement Fee
- Lost Item Replacement Fee Refund Ratio : 100 Percent Lost item refund
- Maximum Fine : No maximum fine
- Overdue Fine : No overdue fine
- Grace Period : 30 minutes
- Is Renewable : Not Renewable
- Closed Library Due Date Management : Move Due Time to Upcoming Closing Time

GU-Q (Qatar)

Summary: Innovation Lab items do not circulate. Everything else does. No requesting/booking.

Request

Items are not requestable.

Loan

Innovation Lab non-circulating

Name	Operator	Value
Location	=	Qatar Library - Innovation Lab
Output		Non-circulating

Qatar Equipment 3-Day Loan

Name	Operator	Value
Item Policy	=	Equipment
Material Type	=	Equipment
Location	=	Qatar Library - Circulation Desk
Output		3-Day Loan (Qatar)

3-Day Loan (Qatar) Output terms:

- Is Loanable : Loanable
- Is Recallable : No Recall
- Due Date : 3 Days
- Lost Item Fine : No Lost Item Fine
- Lost Item Replacement Fee : 110.00 Lost Item Replacement Fee
- Lost Item Replacement Fee Refund Ratio : 100 Percent Lost item refund
- Overdue Fine : No Overdue Fine
- Grace Period : 1 Hour grace period
- Is Renewable : Not Renewable
- Closed Library Due Date Management : Move due time to next open time

Qatar Equipment 28-Day Loan

e.g. Kindles

Name	Operator	Value
Item Policy	=	Equipment
Material Type	=	E-reader
Location	=	Qatar Library - Circulation Desk
Output		4-Week Loan (Qatar equip)

4-Week Loan (Qatar equip) Output terms:

- Is Loanable : Loanable
- Is Recallable : No Recall
- Due Date : 28 Days (4 weeks; uses Days unit of measurement)
- Lost Item Fine : No Lost Item Fine
- Lost Item Replacement Fee : 110.00 Lost Item Replacement Fee
- Lost Item Replacement Fee Refund Ratio : 100 Percent Lost item refund
- Overdue Fine : No Overdue Fine
- Grace Period : 3 exact days grace period
- Is Renewable : Not Renewable
- Closed Library Due Date Management : Move due time to next open time

---

SCS

Summary: All items are loanable for 7 days. No requesting/booking.

Request

Items are not requestable.

Loan

Name	Operator	Value
User Group	In List	Continuing Ed & Prof Development, Graduate Student, Library Staff, Non-Tenure Line Faculty, Senior, Staff, Staff/AAP Retiree, Tenure Line Faculty/Emeritus Faculty, Undergraduate
Location	=	SCS Equipment
Output		7-Day SCS Equipment

7-Day SCS Equipment Output terms

- Is Loanable : Loanable
- Is Recallable : No Recall
- Due Date : 7 Days (Days unit of measurement)
- Lost Item Fine : No Lost Item Fine
- Lost Item Replacement Fee : 200.00 Lost Item Replacement Fee
- Lost Item Replacement Fee Refund Ratio : 100 Percent Lost item refund
- Maximum Fine : 70.00 Maximum Fine
- Overdue Fine : $25 / Calendar Day
- Grace Period : 5 Exact Days Grace Period (excluded from fine)
- Is Renewable : Not Renewable
- Closed Library Due Date Management : Move to next open day (same hour)

Booking request creation

Basic process and common errors for patron-created requests in Primo and staff-created requests in Alma.

as of 18 September 2025; Primo portions assume use of VE original UI, not NDE UI

Patron-created requests

Basic process in Primo

Navigate to an equipment record in HoyaSearch (Primo)

Patron needs to log in, if they haven't already

Click on the Georgetown Request link

Select the dates/times desired

- for equipment items, select the date range desired, up to three days
- for studios, select the date and times for the reservation, up to 3 hours

Click the Send Request button

If it worked, they'll receive the message, "Your request was successfully placed."

> If a patron wants to use multiple pieces of equipment, yes, they have to place a separate request on each piece of equipment.

Common problems/errors

No items can fulfill the submitted request.

This usually means the date range selected is too long. The system is very pedantic about date selection, so "three days" means the 14th to the 16th, for example.

This could also mean that all items are already booked for some portion of the date range selected. The patron can use the "Check Availability" link to see if part of the desired date range is blocked off as unavailable.

Request conflicts were found.

Some portion of the request conflicts with other requests already in the system. The patron can use the "Check Availability" link to see if part of the desired date range is blocked off as unavailable and adjust their request accordingly.

Note for Digital Media Studios: There needs to be a 30-minute buffer between reservations. This allows patrons time to get back up to the circulation desk and return the key without penalizing someone who will be using the room immediately afterward. So if there’s a reservation ending at noon, the next reservation can’t start until 12:30 p.m. Unfortunately this isn’t reflected on the availability calendar, so it can be confusing.

Please fill in the following mandatory fields to proceed: You must select time slot

[Digital Media Studios only] Either the Date, Hour, or Minutes fields were left empty. All three elements, date, hour, and minute, must be selected for both the Reservation Start and the Reservation End to define the desired reservation time. Depending on the size of the browser/screen, the Minute drop-down box may not be visible until after the Hour is selected because the submission form doesn't adjust well to some screen sizes.

The resource cannot be booked while the library is closed.

[Digital Media Studios only] The times selected are outside of the Service Desk hours; the studios can only be reserved when the Service Desk is open. Patrons can use the "Check Availability Calendar" link to see available times on the desired date.

Staff-created requests

Basic process in Alma

1. Perform a title search (All Titles or Physical Titles) in Alma
2. Click the three dots button and select Request
3. In the Request Type dropdown list, choose "Booking Request"
4. Fill in the "Requester", "Date Range", and "Pickup At" fields
5. NOTE: You can override the future limit and maximum allowed booking length by clicking the "Override Booking Policies" checkbox.

6. Click Submit
7. You should be taken back to your search results and see a green popup message "The request was successfully submitted : request id = [long string of numbers]".

> If a patron wants to use multiple pieces of equipment, yes, you have to place a separate request on each piece of equipment.

Common problems/errors

No items available for the request due to policy.

Some portion of the request contradicts what's allowed in the Alma terms of use (e.g. how long the booking will last).

If that's the desired outcome, check the "Override Booking Policies" checkbox to proceed with placing the request.

Request conflicts were found.

Some portion of the request conflicts with other requests already in the system. You need to adjust the request dates to avoid the conflict.

Note: Cindy has encountered at least one example where this message appeared even though there were no apparent conflicts, so there may be something in the settings that needs additional refinement? *In that case, use the "Override Booking Policies" checkbox to proceed with the new request, if able, then alert AlmaHelp of the issue and provide the new request ID so the "conflict" can be investigated.*

Booking workflows for staff

Staff workflows for handling booking requests in Alma: viewing upcoming requests, processing the request for the hold shelf, removing item from hold shelf if not checked out by patron.

Handling scheduled bookings

Viewing requests in advance

All scheduled bookings

Go to Fulfillment > Monitor Requests & Item Processes

In the Facets, find the Request/Process Type header and click Booking Request

Export the list using the icon if sorting/printing is desired

NOTE: Please make sure to delete/destroy the files and any paper copies after use for patron privacy! Future reporting needs can be handled via Alma and Analytics.

Bookings for a particular type of item

Physical Titles search > name of item (e.g. Canon DSLR Camera)

or

Physical Items search > barcode or name of item

When there are requests in the system, the result will have an entry "Requests: {#}" and the number of requests is clickable. (Results are sorted by Request Date, unfortunately, rather than anything useful. Removing the Request Date field display does not alter the sort.)

Note: Equipment bookings scheduled through HoyaSearch are not assigned to a specific barcode in advance. If a booking is manually scheduled by a staff member in Alma, it might be (erroneously) attached to a specific item.

Bookings for a specific patron

Manage Patron Services > lookup patron > Requests tab > filter to Request Type: Booking request (if the list is long) *--this will include both A/V equipment and studio reservations*

Handling on the day of a booking: Equipment

Booked items will (usually) appear in the Pick From Shelf list, and slips can be printed from there

Pull the item needed for the booking

Scan In the item to associate the barcode with the booking →this triggers an email to the requester that their item is on hold for them

When the requester arrives at the circ desk, check out the item as usual for a hold shelf item

Note: When there is one booking on a piece of equipment with multiple items, it's possible to loan all but one of the items to other patrons–the last available item is reserved by Alma for the booking even if the booking request is still on the Pick From Shelf list (i.e. no specific item has been put on the hold shelf for that request).

It is not possible to override the "Item cannot be loaned due to a booking request" block.

Handling on the day of a booking: Studios

Unlike the equipment, there is no special handling required before circulation to the patron with a reservation. These requests do NOT appear on the Pick From Shelf list.

Expected process:

- Patron arrives at the Service Desk and asks for the key
- Look up the patron in Manage Patron Services and verify which room they have scheduled for that date and time
- Retrieve the key from the lock box and check it out to the patron
- The Due date and time will correspond to what the patron selected when making their reservation → if they scheduled two hours, they will only get two hours, even though the maximum is three hours.

Note: There is a 30-minute buffer between scheduled reservations. If the key has already been returned by the prior room occupant, the next scheduled patron can check out the key up to 30 minutes early for their scheduled time.

It is not possible to override the "Item cannot be loaned due to a booking request" block, so the patron picking up the key MUST be the one who scheduled the room.

Handling items not picked up

Studios

If a patron schedules a studio and does not check out the key within 30 minutes of the scheduled start time, that room becomes available for use by other patrons automatically. Nothing needs to be done by library staff in this scenario.

Equipment

The Booking Release Time allows a booked item to be automatically available for circulation after a period of time (25 hours is the current setting for a/v equipment)–but it doesn't remove the item from the hold shelf.

A booked item not picked up from the hold shelf within the initial 25 hours of the booking can be handled as a non-expired but unwanted hold item.

One possible workflow:

- Do a Physical Items search for the barcode of the item being removed from the hold shelf.
- Click on the number following the label **Requests**.
- On the Resource Request Monitoring page, click the three dots button for the request that's on the hold shelf, choose "Update Expiry", then change the Expiration Date to yesterday.
- Fulfillment > Scan In Items > enter item barcode.
- If there was a waiting request, you'll see "Destination: On Hold Shelf" with the requester's name; click the three dots button and choose Print Slip to get a slip for the new request.

***When there are back-to-back requests and no items are available on the (regular) shelf, the request will not appear on the Pick From Shelf list*.** Using Scan In Items on items being removed from the hold shelf is the ONLY WAY found that provides the ability to print a slip for the next requester in this scenario.

If items remain on the hold shelf beyond the originally booked date(s), they will appear on the Expired Hold Shelf list. Equipment with pending requests will show up under the Activate Next tab; clicking the Activate Next button will print the slip for the next requester and produce a little popup message about what needs to happen with that item.

Possible messages:

- The next step for item: [item] is: On Hold Shelf
- To continue processing the item "[item]" it must be moved. The destination is: Reshelve Without Transit.

Equipment cataloging

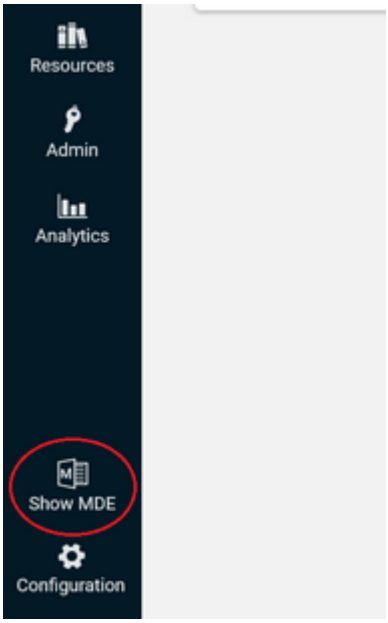
Covers creating new records and adding items, including required fields and selections for each library. Target audience is equipment managers who are unfamiliar with Alma and library functions like cataloging.

> These directions refer to an Equipment template that was created in the GT IZ for use by non-catalogers in creating new records, and also mention use of 956 (thumbnail URL) and 996 (resource type) local fields; configuration of the local fields for Primo is covered elsewhere.

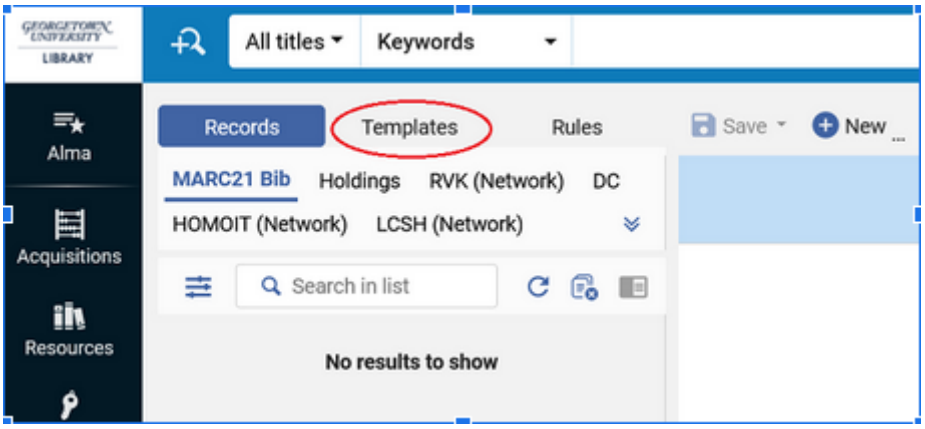
as of 18 September 2025

Creating a new record

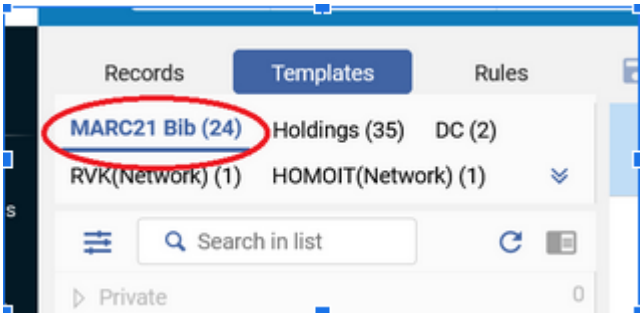
The easiest way to get into the Metadata Editor (MDE) is to click the shortcut near the bottom left corner of the Alma screen (keyboard shortcut: Alt + M):



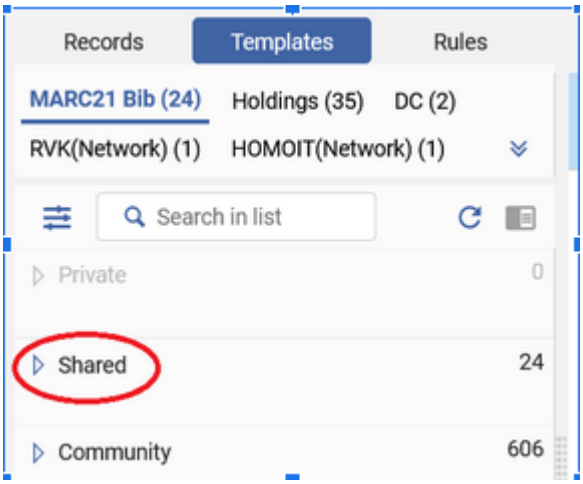
When the MDE is open, click on Templates:



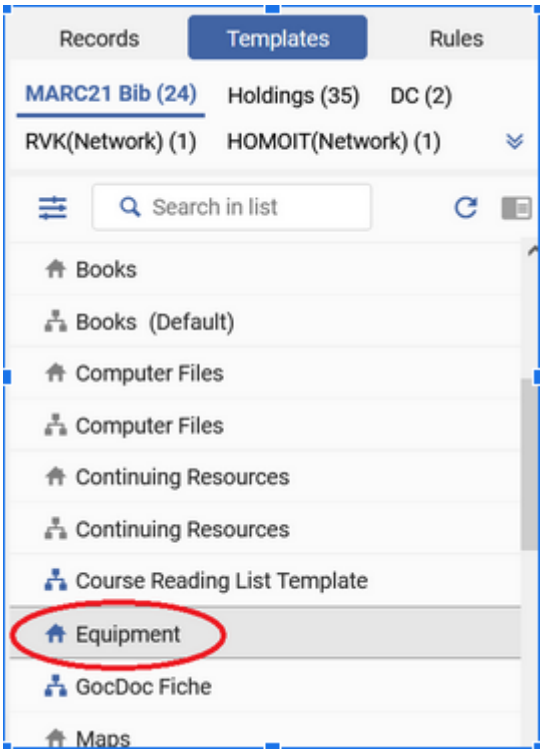
Then click on "MARC21 Bib" if it isn't selected already:



Click to open the Shared section:



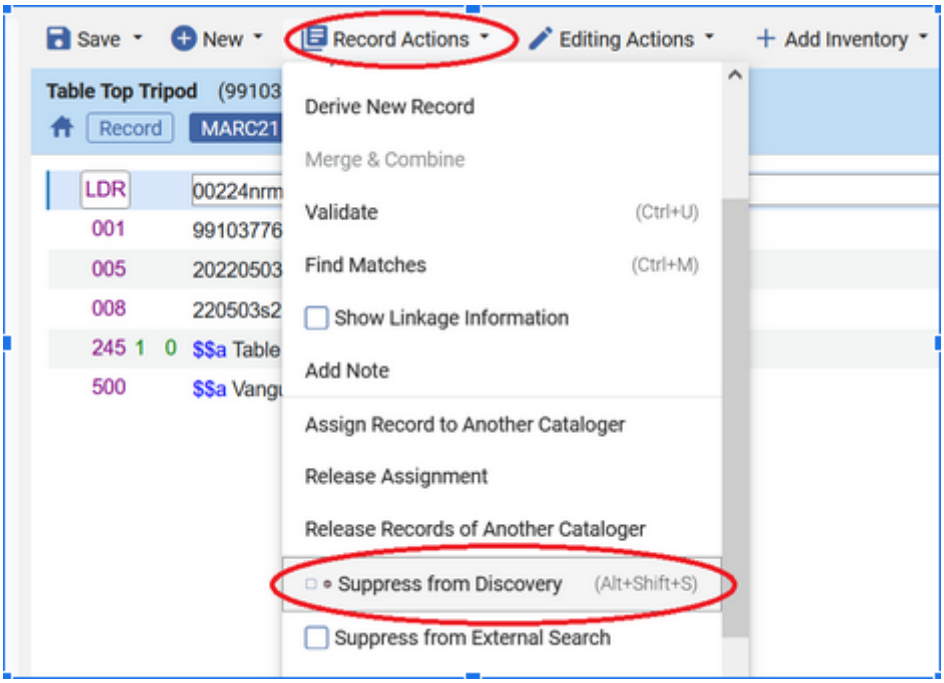
Find the "Equipment" template and click on it:



This will open a new record for you to edit. Add:

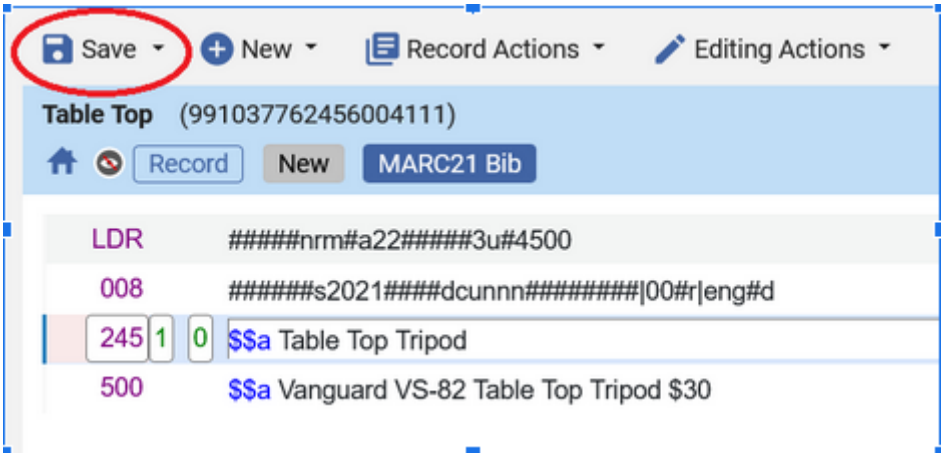
- Name of the piece of equipment (e.g. Table Top Tripod) in the 245 field
- Any notes you want to record in the 500 field (staff have used this to record the brand/model/etc. of the equipment and the cost) -->NOTE: This is visible in HoyaSearch/Primo
- If you have a thumbnail image for display, enter the URL of the image in the 956
- The 996 says "equipment" →leave this alone, it tells HoyaSearch this is equipment rather than a book

SCS ONLY: You will also need to click Record Actions and select "Suppress from Discovery" (keyboard shortcut Alt+Shift+S):

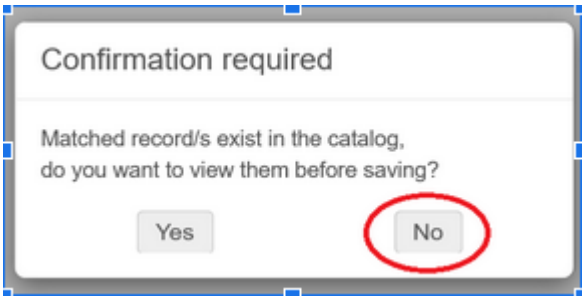


This keeps your equipment from appearing in HoyaSearch.

When you're finished, or if you need to step away from the computer without losing your work, click Save.



If a warning about matching records pops up, click No to proceed with saving your record.

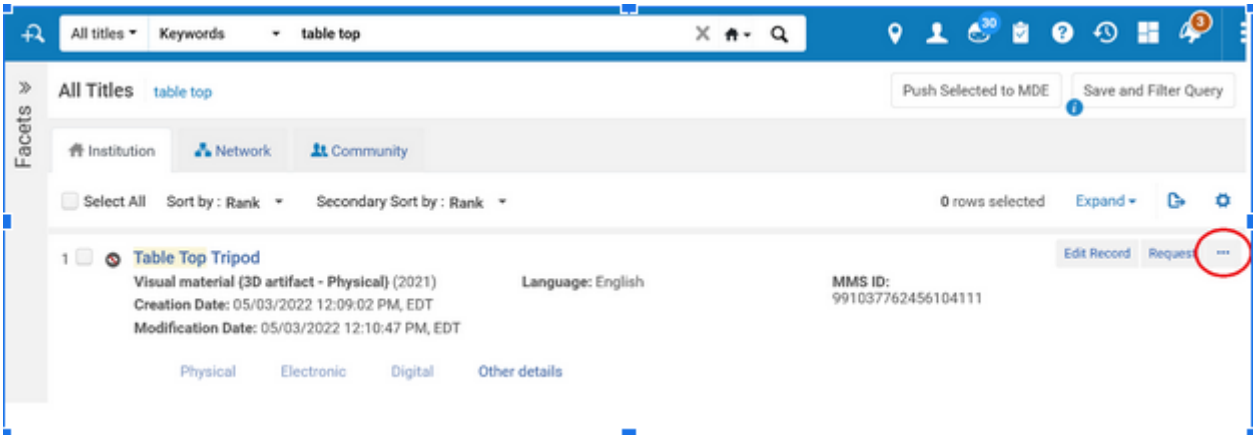


Add holdings and item(s)

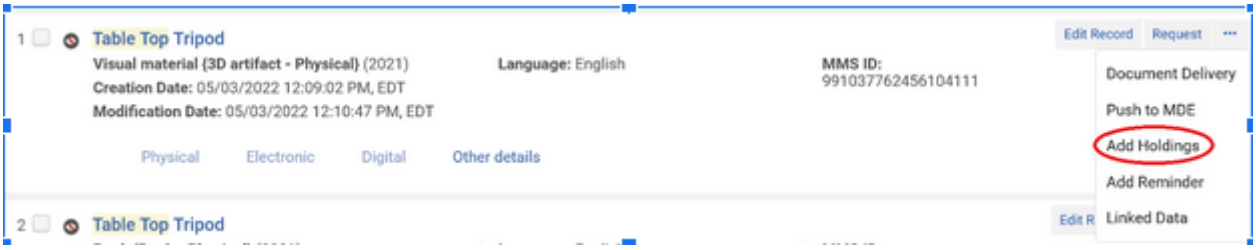
Use the Alma search bar to find the equipment record you want (make sure the left drop-down box is set to "All Titles"):



When you've found the one you need, click the three dots along the right-hand side of the display for that record:



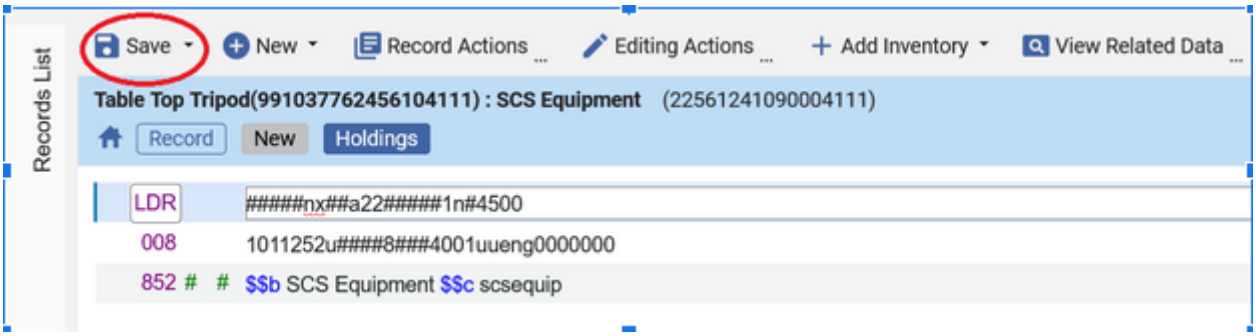
Then click "Add Holdings":



This will open the MDE with a new Holdings record. Enter the appropriate Library and location in $$b and $$c:

- Lauinger : $$b lau $$c steq
- SCS : $$b SCS Equipment $$c scsequip
- Qatar : $$b qatar $$c qequip [Innovation Lab] OR $$c qcirc [Circulation Desk]

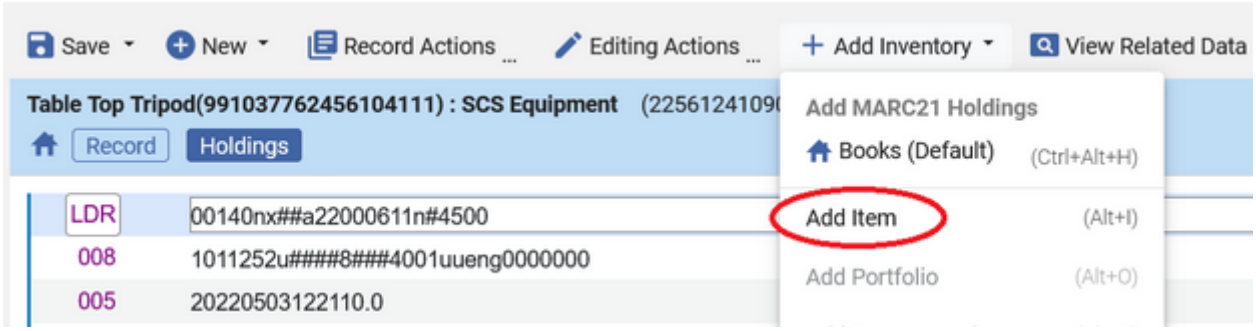
Then click Save:



Now click on "Add Inventory":



Select "Add Item":



This opens the Physical Item Editor, where you enter the barcode and other needed information.

Required item information

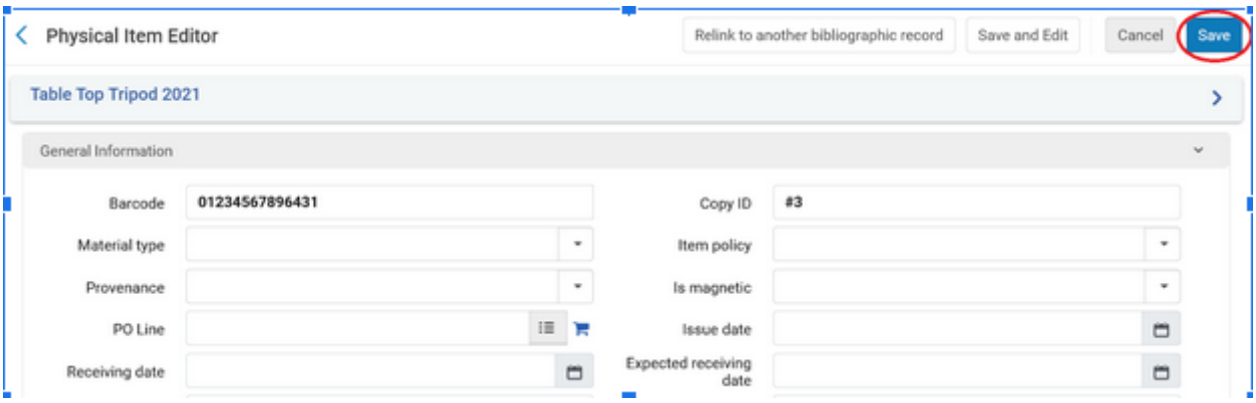
1. Barcode
2. Item Policy and Material Type combinations in use for checkout policy purposes:
    1. Lauinger & Capitol Campus
        1. Material Type = Equipment
        2. Item Policy
            1. Equipment (for bookable items), OR
            2. 3-Day Reserve (for non-bookable items that loan for 3 days), OR 2-Hour Reserve, No Overnight (for power banks) OR 4-Hour Reserve, Overnight (for other non-bookable items like chargers)
    2. SCS *(optional)*
        1. Material Type = Equipment
        2. Item Policy = Equipment

    3. Qatar
        1. Material Type
            1. Equipment (for non-ereader materials), OR
            2. E-reader (for Kindles and their accessories)
        2. Item Policy = Equipment
3. Description
    1. Lauinger & Capitol Campus : THIS FIELD MUST REMAIN BLANK
    2. This field can be used or left blank, as desired, for SCS and Qatar
4. Replacement Cost
    1. Required if you want patrons to be charged the full cost of an item if they lose/fail to return it
    2. Otherwise, they're charged the flat amount (often $110 or $200) for lost items.

Optional item information

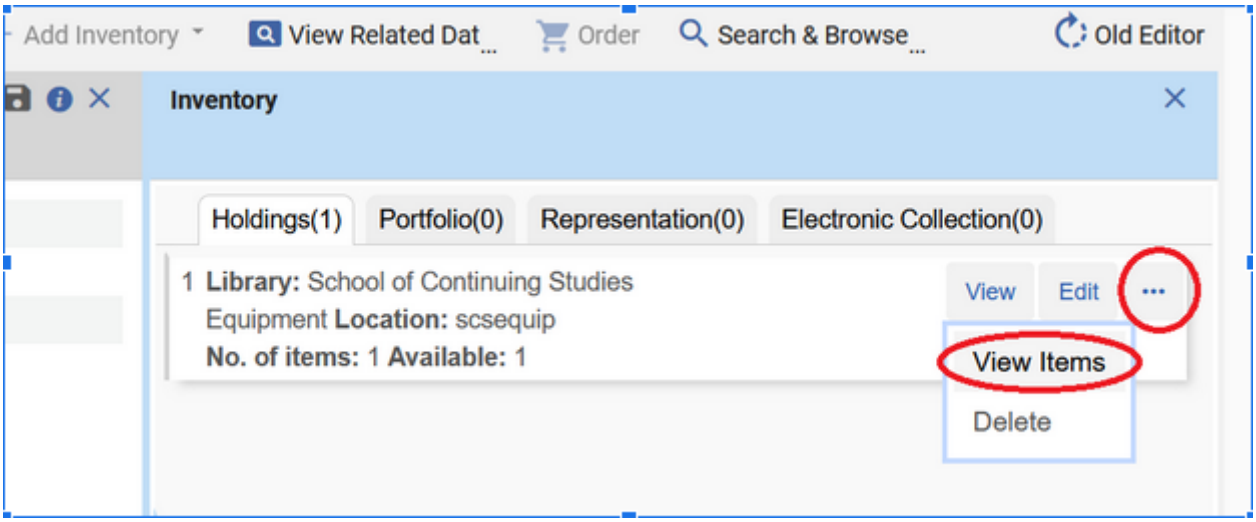
1. Copy ID : this may be useful if you have multiple items of one type (e.g. tripods).
2. Pieces : For equipment kits involving multiple parts, you can use the Pieces field to record the number of pieces included in the kit. This does not affect anything related to circulation, but can be helpful for recordkeeping.
3. Item Call Number : this can be used in place of, or in addition to, the Copy ID field to distinguish between similar items.

Click Save.

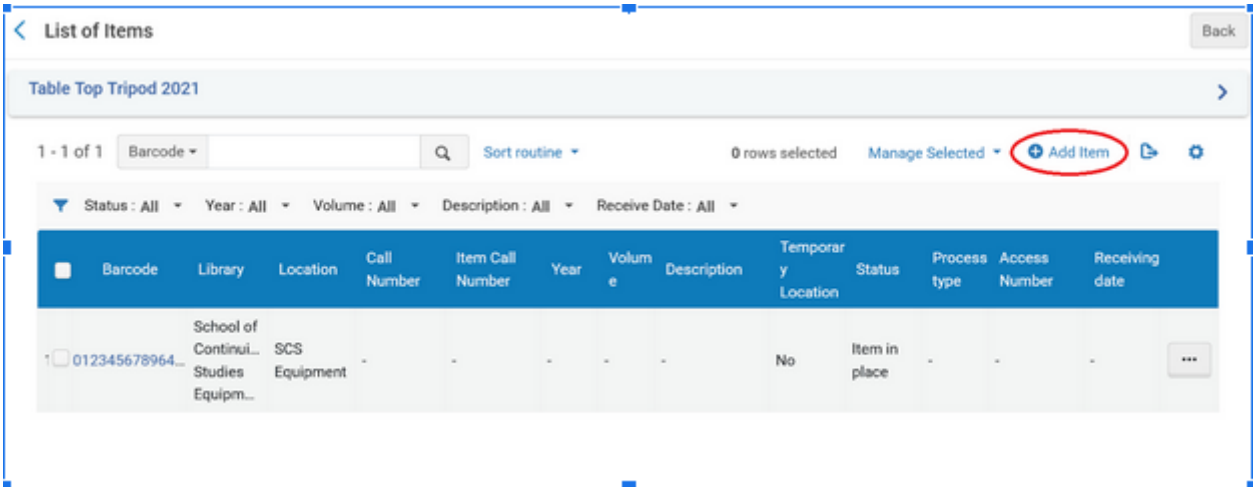


You'll be taken back to an MDE inventory screen.

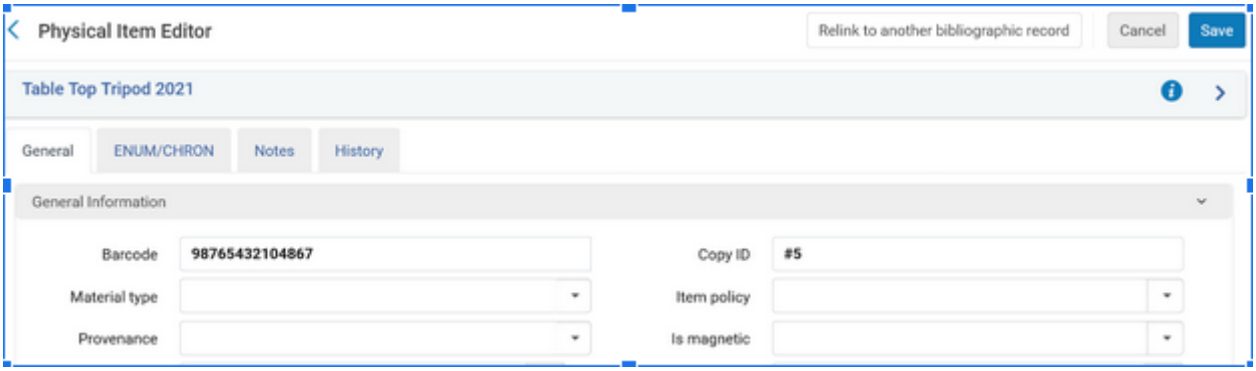
If you need to add more items (i.e., you have more than one tripod to circulate), click on the three dots and select View Items:



You'll be taken to the List of Items screen where you can click "Add Item" to add another item:



This will take you to the Physical Item Editor where you can enter the second item's information:



Clicking Save will take you back to the List of Items.

> Repeat for each additional item until all are entered into Alma.

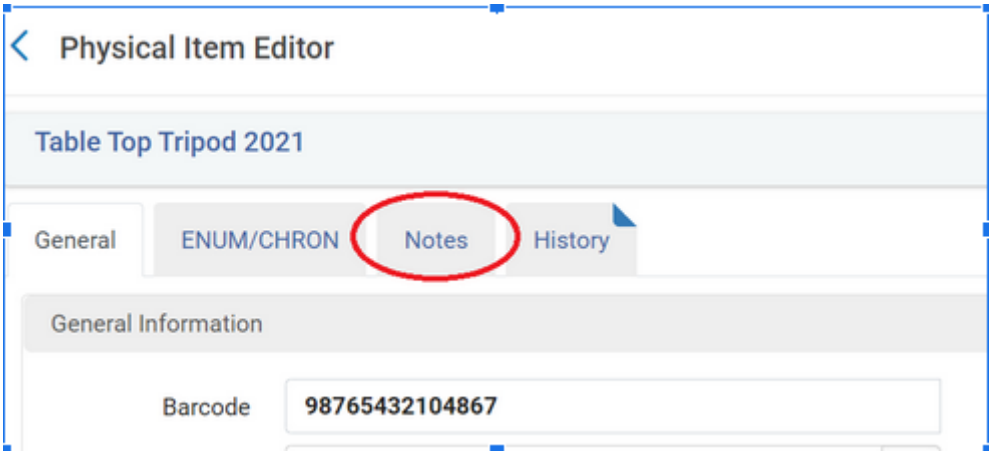
Item Notes

If there is information specific to one particular item, you can use the item notes to record that information. The maximum length for most item notes is 4000 characters.

If you're adding notes while creating an item, the item must be saved before the Notes tab is available and a note can be added. You can click the **Save and Edit** button to save the barcode, etc., and have the Notes tab appear.



Or, if adding a note later, open an item in the Physical Items Editor and you'll see the Notes tab.



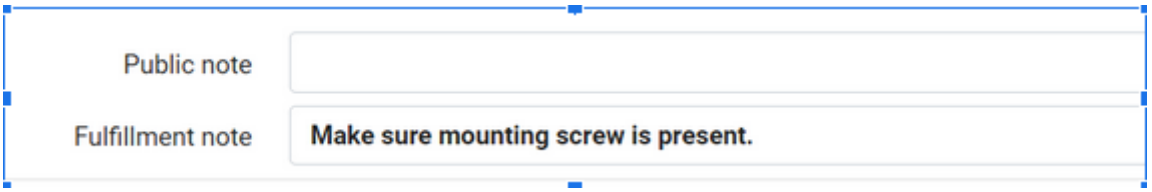
There are several types of notes available: Functional, Internal, and Statistics.

> Do not use the Statistics Notes fields; there are specific ways those are used by Lauinger and WRLC.

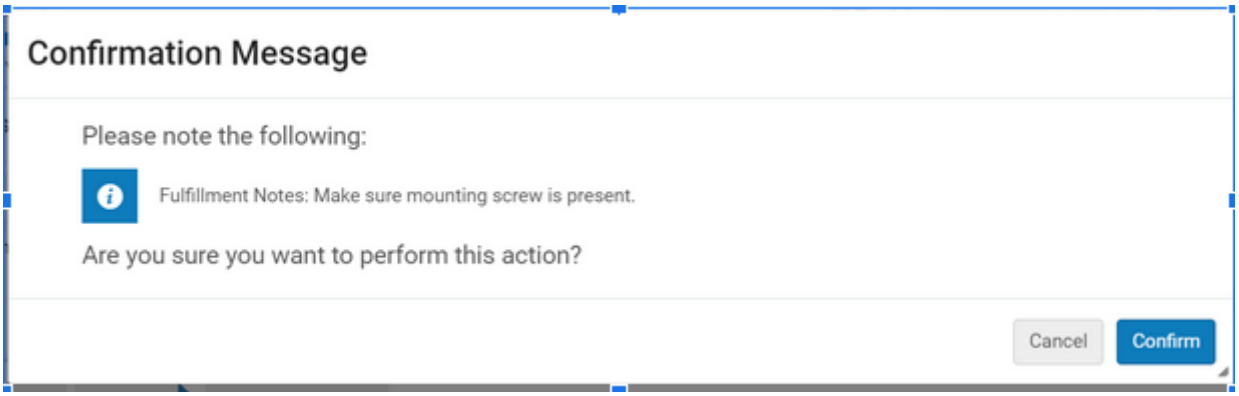


The most relevant for equipment circulation purposes is the Fulfillment note. Anything in this field will pop up when the barcode is checked in or out, so it can be a helpful place to indicate what parts should be present and/or missing pieces.

For example: This is a Fulfillment note to check for a particular piece.



That note will look like this when you're checking out the tripod to a patron:



The choice to use fulfillment notes and what to put in them is 100% up to you.

You can use the Internal note fields for information you want to record but that you don't want/need to pop up during circulation.

Resources

Ex Libris documentation

Booking Workflow

Creating Booking Requests

Booking Configuration

Configuring Physical Fulfillment - Adding Fulfillment Policies

Requests in Alma - Booking Requests

Alma Essentials videos: Booking Requests / Booking Requests Management

Configuring Fulfillment Jobs - Configuring Other Settings (enable_booking_workflow)

Scheduled Jobs - Handle Expired Booking Requests

Cindy's Presentations

2024 ELUNA Annual Meeting : Equipment Booking: What We've Learned (and What We Still Don't Know)

2024 WRLC Annual Meeting (shortened from ELUNA 2024 presentation) : Alma/Primo VE Equipment Booking: What We've Learned So Far

2025 ELUNA Annual Meeting : Booking Revisited: Implementing Room Reservations

All presentations include copious screenshots and links