

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.

Revision #2

Created 13 May 2026 15:27:57 by Cindy Bowen

Updated 21 May 2026 21:14:36 by Cindy Bowen