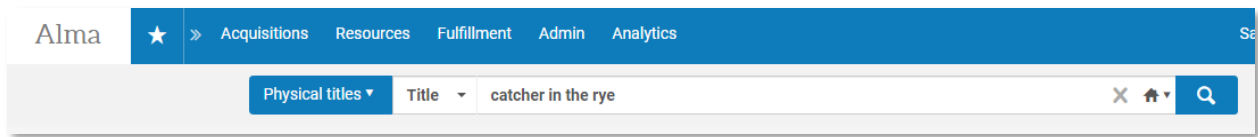
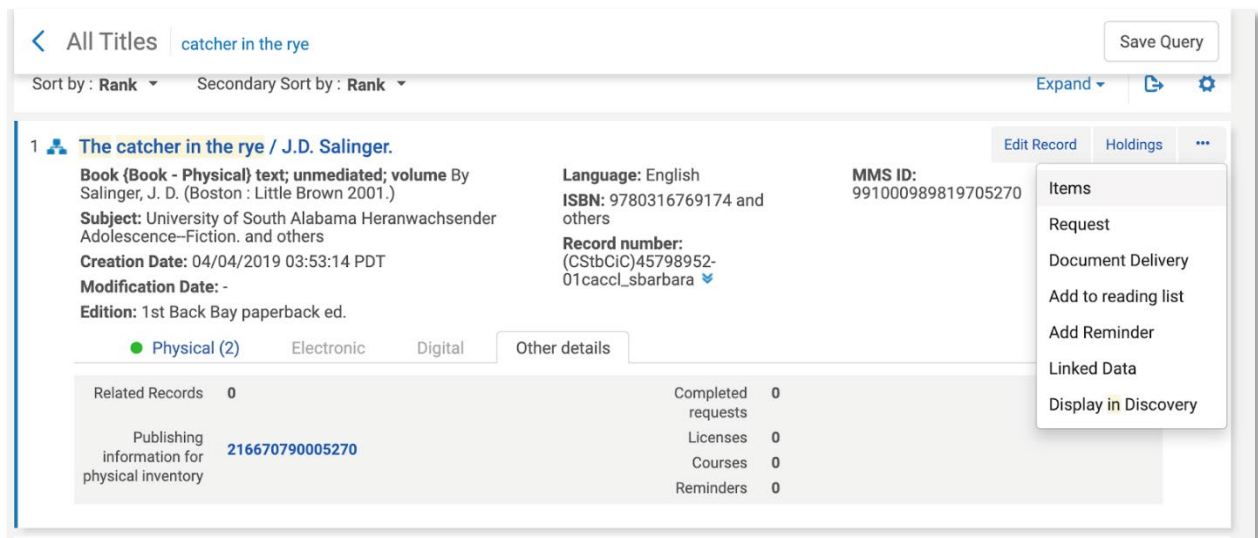


# ALMA QUICK TIPS: Placing a Hold and Canceling a Hold

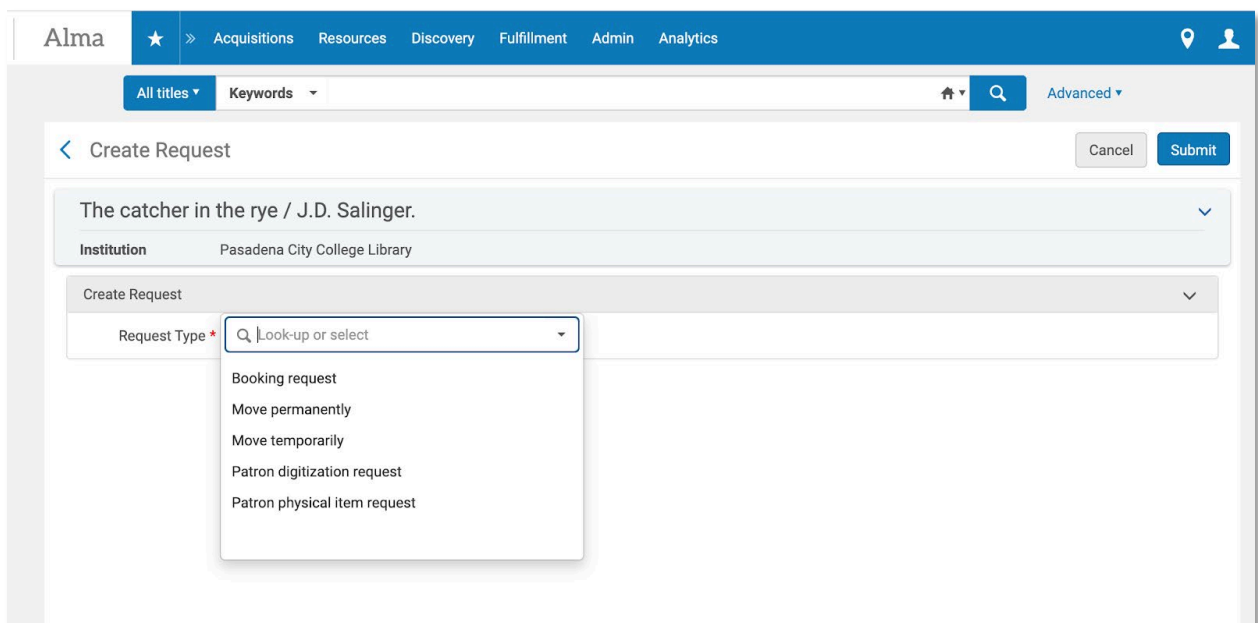
1. Search for the item to be requested in the Alma dashboard. Narrowing the search to **Physical Titles** is recommended.



2. After identifying the item in discovery, click on the “...” box in the upper right hand corner of a result. Then, select “Request” from the dropdown. *Note: depending on your institution’s configuration, shortcuts may exist for this action (a “Request” button on the item record, for example).*



3. On the **Create Request** screen, select “Patron physical item request” from the dropdown menu.



4. On the screen that follows, enter the “Requester” barcode number and the “Pickup At” location.

The screenshot shows the 'Create Request' form. At the top, there is a back arrow, the text 'Create Request', and 'Cancel' and 'Submit' buttons. Below this is a dropdown menu showing 'The catcher in the rye / J.D. Salinger.' and another dropdown for 'Institution' showing 'Pasadena City College Library'. A section titled 'Create Request' contains several fields: 'Request Type' with a dropdown set to 'Patron physical item request', 'Requester' with a text input 'Hughey, Joshua' and search icons, a 'Note' text area, and 'Pickup At' with a dropdown set to 'No Campus: Shatford Library'. At the bottom of this section is a button labeled 'Override On Shelf Request Policy'.

5. If you do not allow “on-shelf” requests but want to override that policy, you can click on **Override On Shelf Request Policy** to do just that!


6. Click “Submit” to complete the request.

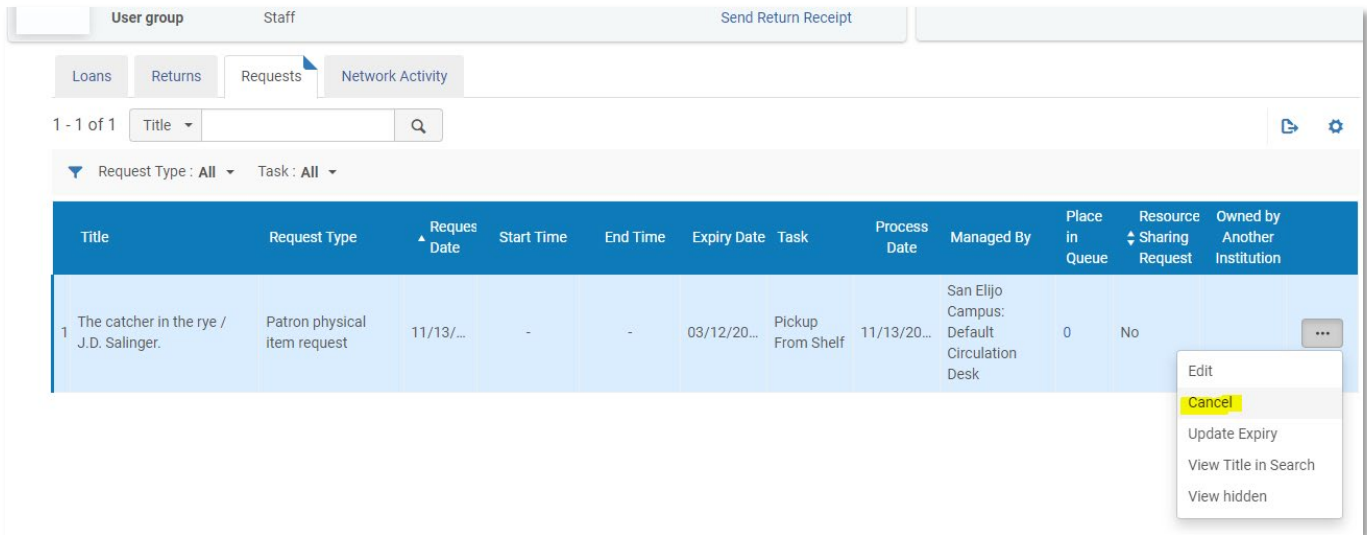
## Canceling a Hold in Alma

There are a few ways to cancel a hold in Alma:

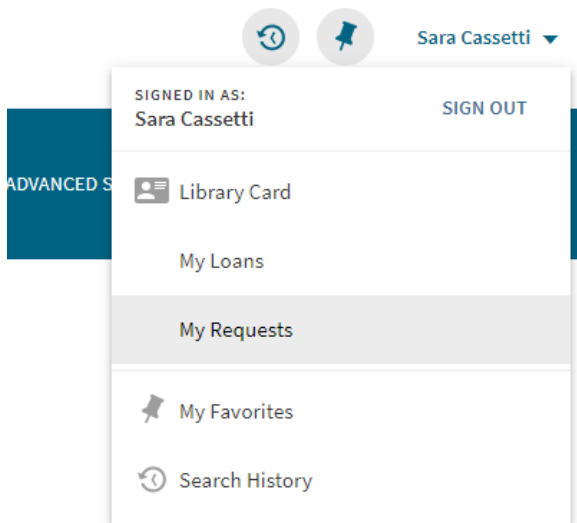
**Option #1** Staff with the appropriate authorization/user roles can cancel a hold by going to **Resource Request Monitoring** under the **Fulfillment** drop-down menu and selecting “Cancel” on the appropriate request record.

The screenshot shows the 'Resource Request Monitoring' page. At the top, there is a back arrow, the text 'Resource Request Monitoring (1 - 15 of 15)', and a filter bar with 'Activity Status : Active' and 'Pickup Location : San Elijo Campus' with a 'Clear all' button. Below this is a list of request records. The first record is numbered '1' and has a book icon. The record details are: 'The catcher in the rye / J.D. Salinger.', 'Request Type: Patron physical item request', 'ID: 278350870005274', 'Creator: Cassetti, Sara', 'Requester: Cassetti, Sara', and 'Pickup Location: San Elijo Campus'. To the right of these details are: 'Place in Queue: 0', 'Call Number: PS3537.A426 C3 2001', 'Request Date: 11/13/2019', 'Workflow Step: Pickup From Shelf', 'Process Status: New', 'Managed By Library: San Elijo Campus', 'Managed By Desk: Default Circulation Desk', 'Process Date: 11/13/2019', and 'Expiration Date: 03/12/2020'. A yellow 'Cancel' button is highlighted on the right side of the record.

**Option #2** Staff who are limited to the Circulation Desk Operator role can navigate to the requesting user's account under **Manage Patron Services**, go to the **"Requests"** tab, and select **"Cancel"** from the dropdown menu under the  button.



**Option #3** Lastly, patrons may cancel their own requests using Primo by going to their account information, selecting **"My Requests"** from the dropdown menu (pictured), and selecting **"Cancel"** from the list of requests.



## Requests

- |  |  |                          |
|--|--|--------------------------|
| <sup>1</sup> <a href="#">Raising a child with autism : a guide to applie...</a><br>Richman, Shira, 1972- | REQUEST. In Process<br>Pick up: San Elijo Campus                       | <a href="#">X CANCEL</a> |
| <sup>2</sup> <a href="#">The catcher in the rye /</a><br>Salinger, J. D. 1919-2010. (Jerome David),      | REQUEST. Not Started. Place in queue is:1<br>Pick up: San Elijo Campus | <a href="#">X CANCEL</a> |