5. REQUESTS AND HOLD MANAGEMENT

5.1 PLACING HOLDS VIA WORKFLOWS

To place a hold for a user, use the Place Hold wizard in the Circulation module Common Tasks wizard group. The Place Hold Wizard assumes that you would first do a User Search, identify a user, and then perform an item search. Open the Place Hold wizard.



Find the user for whom the hold is to be placed using the User Search routine. Then, once you have highlighted the desired user, click on the Place Hold for This User button.



If the user comes up as blocked, override using the password (assigned to your library). Once you have selected a user, an Item Search screen appears over the Place Hold screen:

I	ice Hold	ALI	Dea l um e l	
ł	<u>, , , , , , , , , , , , , , , , , , , </u>	ice Hold : H	tem Search	- 5
	User Information	*	→	
	Name:	Search for:	_	Search
	Profile name:	Index:	Title	Type:
	User categories:			
	Group ID:	Library:	ALL	Keywc
				O Brows

After you perform a catalog search, highlight the desired title from the hit list and examine the call and item records associated with it:

-2	e Hold								
ø	ice Hold : It	em Search					- 🗆 ×		
	📌 🖗 🔶	⇒							
	Search for:	bloodsucking				-	Search		
	Index:	Title				-	Type:		
	Library:	ALL				-	Keyword		
	Current						C Browse		
	Current: C Exact								
-	KEYWORD	Title bloodsucking, ALL	4 records						
_ [^k	Title		Author		Publis	her	Pub. Year		
	Bloodsuckir	ng leeches	Neuman, Pearl.		New York : Bearpo	rt Pub., c2009.	2009		
	Bloodsuckir	ng cinema [DVD]	Gray, Barry.				2008		
ι	Bloodsuckir		Moore, Christopher		New York : Perenn				
	Bloodsuckir	ng fiends : a love story	Moore, Christopher	, 1957-	New York : Simon &	& Schuster, c1	1995		
	Description	Call Number/Item							
	□ 문 Bloods	sucking fiends : a love s	tory - Moore, Christe	Price:	\$21.95	Item type:	MAIN		
- B		ORE, C ELLENVILLE		Home locatio	n: FICTION-A	Current locat	tion: FICTI		
		32810008613865 - 1 - 1	MAINBK-O - FICTION	Item categor	y 1: FICTBOOK	Item categor	y 2: ADUL		
F		ORE - NEWBURGH		Date created	10/18/1995	Media desk:	none		
E C		32826008012494 - 1 - /	ADULTBK-O - FICTI	Date last cha	arged: 11/13/2010	Previous use	r ID:		
		/ MOORE - SUFFERN		Last discharg	ged: Never	Last activity:	11/23		
C		32837000942950 - 1 - /	ADULTBK-O - FICTI	Date invento	ried: Never	Total checko	uts: 28		
E				Times invent	oried: 0	In-house use	s: 0 _		
	•		Þ	4					
			Place	Hold Cancel					

If you want to place a Title level hold (i.e. any available copy from any library), it doesn't matter which item record is highlighted just click on Place Hold. On the Place Hold confirmation screen that appears next, although a specific barcode appears in the Item ID field, it will be ignored because of the Level/Range: Title radio button.

MOORE, C. Co	y 1 ID 328100	0861386	5	000000000	 			
Identify User User ID: 2284400	0293220	-					Street: City, state: Zip: SMSPHONE Email:	30 ¹ WA 109 (84
Identify item Item ID: 3281000	3613865	-1						JKO
Pickup at:	MIDDLETOWN		*		Expires:	NEVER	•	
Comments: Date suspended: Level/Range		+			Date unsuspende	a: [*	
Level: Copy	Title							

If you click on the Place Hold button from this screen, the hold is now confirmed and you are presented with a choice of further actions:

	Complete	-
	A hold has been placed on the item	Street: 30
293220	Bloodsucking fiends : a love story	City, state: WA Zip: 109
	Moore, Christopher, 1957-	SMSPHONE: (84
	FIC / MOORE	Email: jkur
	32837000942950	
13865	Place Hold for Another User	
	Place Another Hold for This User	
	Remove This Hold	*
*	Modify This Hold	*
	Close	-
⁷ Title		
Get User Information	Get Item Place Place Hold Information (b) Hold for Another Us	" Close

If you had wanted to make a Volume Level hold on a particular serial issue or set part (example: Fodor's San Francisco 2011 edition, available from any library) you would need to make sure that the copy you highlighted was an item (from any library) for that particular volume; and that the radio button is still set to Title level.

Title	Author	
Around San Francisco with kids	Norton, Clark	
Fodor's upClose San Francisco		
Fodor's exploring San Francisco	Sinclair, Mick.	
Fodor's citypack San Francisco	Sinclair, Mick.	
Fodor's San Francisco	Fodor's Travel Public	cations, I
Description Call Number/Item		
⊡ ∰ 917.94 FODOR 2011 - BL	AUVELT	Price:
32802000853813 - 1 -		Home
🖻 🏨 917.9404 FOD 2011 - CE		Item c
	ADULTBK-O - NO	Date o
	W/PULLOUT MAP	Date I
	ADULTBK-O - TR	Last d
		Date i

If you wanted a copy-level hold (one specific item at one library), highlight that barcode and on the Place Hold confirmation screen change the Level/Range from Title to Copy.

In the real world, we know that the process of assisting a patron starts with a catalog search to see what material exists—and whether it is in-house and on the shelf, or in a non-circulating collection, or requires that you try different search terms and strategies just to find the right title. There is a way that you can start the Place Hold process by first doing an Item Search. If you do an Item Search and complete it to the point where you have asked for a Detailed Display:

Search for:	aliens		
ndex:	Title		
Library:	ALL		
	,		
Current:	Van Lente, Fred. — Cowboys & aliens -	- FICTION COWBOYS - ID:3284	4001605628 — Ctrl#
	Title aliens, ALL: 210 records	1	
Title		Author	
	redator [interactive multimedia]	SEGA of America (Firm) Watson, Brad.	
UFOs and a	aliens	Rooney, Anne.	
	e to aliens : intergalactic worrywarts, bu.	Olander, Johan. Griptonite Games (Firm)	
	s. Aliens [interactive multimedia] s. Aliens [interactive multimedia]	Griptonite Games (Firm)	
Team mons		Herman, Gail, 1959-	
Description	Call Number/Item		
Leader	am8a0c a		
key	15634827		
Date/time Fixed field		000 1 eng	
LCCN	2009005936	ooo i ong	
ISBN	9780761455943		
Local syste LC Call Nu			
	F27.04233 Fic 2010		
		Detailed	Disalau Olau I
6 55			
field guide	1: 	bubblonauts, sliver-slurpers, and	
field guide	to aliens : intergalactic worrywarts, t	bubblonauts, sliver-slurpers, and with Orders Selections	
「field guide ntrol Biblio ヨA field guide	to aliens : intergalactic worrywarts, t graphic Call Number/Item Bound-v uide to aliens : intergalactic worrywar A - MIDDLETOWN	bubblonauts, sliver-slurpers, and with Orders Selections	l other extraterrestrials
ntrol Biblio a field g b A field g b A field 3 a J OL/ a J M a J M	to aliens : intergalactic worrywarts, t graphic Call Number/Item Bound-v uide to aliens : intergalactic worrywar A - MIDDLETOWN 820004320266 = 1 - JUVBK-O - FIC	with Orders Selections ts, bubblor Item Info Circ Info Call number info	other extraterrestrials Bills Checkouts Ho rmation
field guide	to aliens : intergalactic worrywarts, t graphic Call Number/Item Bound-v uide to aliens : intergalactic worrywar A - MIDDLETOWN 820004320266 - 1 - JUVBK-O - FIC ANDER - NANUET	bubblonauts, sliver-slurpers, and with Orders Selections ts, bubblor Item Info Circ Info Call number info Call number:	l other extraterrestrials
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Once you close a Detailed Display, the system retains any highlighted item information. If you now go to Place Hold, identify

a user, and get to the Item Search step, the retained search automatically appears as the Current item:

_	e Hold	-1 -1 -1 - 1 - 1	
å	ce Hold : I		- 🗆 ×
ΓL	A 🕅 🖛	⇒	
	Search for:	<u> </u>	Search
	Index:	Title	Туре:
	Library:	ALL 🔽	• Keyword
	Current:	Olander, Johan. — A field guide to aliens : intergalactic worry — J OLA — ID:32820004	C Browse C Exact

So you can just click on the Current link and avoid having to perform the same search all over again within Place Hold.

5.2 PLACING HOLDS VIA ENTERPRISE CATALOG

Users can place holds for themselves via the Enterprise catalog. Staff could assist in this process, but the user must be authenticated using their card number and PIN. To place a hold via the Enterprise Catalog, if the user is not already logged in when they try to place a hold, the system will prompt them to log in.

The "Place Hold" button is visible next to title summary displays and title detail displays:



Note: Holds placed via Enterprise can only be system-level holds, or volume-level holds. Enterprise has been set to disallow copy-specific holds.

A window will appear for the user to specify the library where they want to pick up the item when it arrives. If they have selected a Preferred Pickup Library, this library will be selected by default; otherwise, the default pickup location will be the library they registered at.

Place Hold(s)		×
Title	Pickup Library:	
The reckoning	Warwick-Albert Wisner Public Library	\sim
	Place Hold(s)	

Once they have selected the pickup library, click Place Hold. The system will tell you if the hold was successfully placed or not.

Once the use has placed a hold on an item, they will be able to see it in My Account under the Holds tab.

8 Pers	onal Informat	ion Checkout	s	Holds	I Fines		
▶ Digit	al Holds						
▼ Libra	ry Holds						
Read	s on Hold: y for Picku el Hold(s) Ed Select All	ip: 0	Suspend H	iold(s) Cance	el Hold Suspe	ension(s)	
O		Title/Author		Status	Pickup a	it	Place in queue
		The reckoning Grisham, John GRISHAM		Pending	Warwick Wisner Library		442
Canc	Select All	lit Pickup Location(s)	Suspend H	iold(s) Cance	el Hold Suspe	ension(s)	

5.3 DISPLAY TITLE HOLDS

To find out how many users are waiting for a title, open the Display Title Holds wizard in the Holds group (Circulation module).

File	Edit	Wizards	Modules	Preference	Tools	Hel
Cat	alogir	ng (Staff)	Circulatio	n (Staff) 🛛 Off	line (Sta	aff)
Con	mmon Ta	asks		() ()		
Use	275			0		
Ite	ms			(S)		
Ho	ds			()		
	Place	Blanket Hold				
6	Display	y User Holds				
1	Modify	Holds for User	r			
	Remov	ve User Hold				
	Display	y Title Holds				
B	Display	y Item Holds				
÷	Reorde	er Hold Queue				
¥	Modify	Holds for Item	r			
8	Remov	re Item Hold				
R	⁷ Trap H	olds				
Spe	ecial			()		
In-	Transit I	Items		۲		

Search for the title and select it by highlighting it. You do not need to select any particular item record ID, just leave the defaulted selected barcode. Click on OK. The holds queue for that title will appear:

Bossypants / F	ey, Tina, 1970-								
Total number o	items: 53								
Total holdable i									
Total title level I									
Total system ra									
Total group ran									
Total library rar									
List of Holds									
User ID	User Name	Range	Status	Placed	Pickup at	Pickup by	Expires	Suspended	Unsuspended
		Range SYSTEM	Status (unavailable)	Placed 4/6/2011	Pickup at	Pickup by	Expires 5/15/2012	Suspended	Unsuspended
2286100005		SYSTEM	-			Pickup by		Suspended	Unsuspended
2286100005 2284100018	Feldman, Elis	SYSTEM	(unavailable)	4/6/2011 4/6/2011	FALLSBURG	Pickup by	5/15/2012	Suspended	Unsuspended
2286100005 2284100018 2282400031	Feldman, Elis Reynolds, Ve	SYSTEM SYSTEM SYSTEM	(unavailable) (unavailable)	4/6/2011 4/6/2011	FALLSBURG NEWCITY	Pickup by	5/15/2012 4/5/2012	Suspended	Unsuspended
2286100005 2284100018 2282400031 2282500000	Feldman, Elis Reynolds, Ve Lem, Betty	SYSTEM SYSTEM SYSTEM SYSTEM	(unavailable) (unavailable) (unavailable)	4/6/2011 4/6/2011 4/10/2011 4/11/2011	FALLSBURG NEWCITY VALLEYCOTT	Pickup by	5/15/2012 4/5/2012 4/9/2012	Suspended	Unsuspended
2286100005 2284100018 2282400031 2282500000 2286100010	Feldman, Elis Reynolds, Ve Lem, Betty Scott, Margaret	SYSTEM SYSTEM SYSTEM SYSTEM SYSTEM	(unavailable) (unavailable) (unavailable) (unavailable)	4/6/2011 4/6/2011 4/10/2011 4/11/2011	FALLSBURG NEWCITY VALLEYCOTT NYACK	Pickup by	5/15/2012 4/5/2012 4/9/2012 4/10/2012	Suspended	Unsuspended
2286100005 2284100018 2282400031 2282500000 2286100010 2283700039	Feldman, Elis Reynolds, Ve Lem, Betty Scott, Margaret Elbogen, Will	SYSTEM SYSTEM SYSTEM SYSTEM SYSTEM SYSTEM	(unavailable) (unavailable) (unavailable) (unavailable) (unavailable)	4/6/2011 4/6/2011 4/10/2011 4/11/2011 4/13/2011 4/15/2011	FALLSBURG NEWCITY VALLEYCOTT NYACK MONTICELLO	Pickup by	5/15/2012 4/5/2012 4/9/2012 4/10/2012 4/12/2012	Suspended	Unsuspended
2286100005 2284100018 2282400031 2282500000 2286100010 2283700039 2282200008	Feldman, Elis Reynolds, Ve Lem, Betty Scott, Margaret Elbogen, Willi Afferi, Dolores	SYSTEM SYSTEM SYSTEM SYSTEM SYSTEM SYSTEM SYSTEM	(unavailable) (unavailable) (unavailable) (unavailable) (unavailable) (unavailable)	4/6/2011 4/6/2011 4/10/2011 4/11/2011 4/13/2011 4/15/2011	FALLSBURG NEWCITY VALLEYCOTT NYACK MONTICELLO SUFFERN	Pickup by	5/15/2012 4/5/2012 4/9/2012 4/10/2012 4/12/2012 4/12/2012 4/14/2012	Suspended	Unsuspended
User ID 2286100005 2284100018 2282400031 228250000 22865100010 2283700039 228220008 2282500081 2280600019	Feldman, Elis Reynolds, Ve Lom, Betty Scott, Margaret Elbogen, Willi Alfieri, Dolores Gallahan, An	SYSTEM SYSTEM SYSTEM SYSTEM SYSTEM SYSTEM SYSTEM	(unavailable) (unavailable) (unavailable) (unavailable) (unavailable) (unavailable) (unavailable)	4/6/2011 4/6/2011 4/10/2011 4/11/2011 4/13/2011 4/15/2011 4/15/2011	FALLSBURG NEWCITY VALLEYCOTT NYACK MONTICELLO SUFFERN MONTGOME	Pickup by	5/15/2012 4/5/2012 4/9/2012 4/10/2012 4/12/2012 4/14/2012 4/14/2012	Suspended	Unsuspended

By default, the holds are sorted by the date they were placed. Holds will be filled in this order, with exceptions:

--If a copy has hold rules that only allow users from the owning library to have holds filled, other users would be skipped and would never get that copy.

--If a copy allows any user to have their holds filled, but one of the users is from the library that owns the item, that user will get priority. --If a user suspended their hold because they will be away, they would be skipped over.

Because of these exceptions, telling a user their place in the hold queue cannot be accurately determined. Note that the hold queue display is not numbered. Also, the hold queue display can be re-sorted by any of the columns. Re-sorting your display will NOT change the hold queue order that Symphony will use to fill the hold!

Right-clicking on the User ID glossary lists options for Modifying or Removing the Hold, Displaying more Item Information, Reordering the Hold Queue, etc. Many of these operations have their own separate Wizards, described elsewhere.

User ID	User Name	Range	Status
2286100005	Feldman, Elis	SYSTEM	(unavailable)
2284100018	Reynolds, Ve	(unavailable)	
2282400031	Lem, Betty	SYSTEM	(unavailable)
2282500000	Şeetti Merreret	OVOTEM	(unavailable)
2286100010	E Bill User fo		(unavailable)
2283700039	, Display Ite	em	(unavailable)
2282200008	Oisplay Us		(unavailable)
2282500061	Edit Item	lote	(unavailable)
2280600019	E Modify Ho	ld	(unavailable)
2283700047	(Place Hold	1 E	(unavailable)
	Remove H	old	<u>.</u>
	Reorder H	old Queue	

You can also filter the Hold Queue display using the Detailed Hold Count helper so that you could see counters indicating the number of holds for your library's users and copies owned by your library.

play Title Holds				
3 🙀 🛛	Diplay Title Holds : Detailed Hold Count			
Bossypants / F				
F	Bossypants / Fey, Tina, 1970-			
Fotal number o	B FEY ID:32805000443071			
lotal holdable i	BFET ID.32803000443071			
Total title level	Selection Criteria			
Fotal system ra				
Fotal group ran				Level: C Copy C Volume C Title
Fotal library rar	Library: MONROE		-	
				For: O My library O My group O All
List of Holds-				
User ID	counters			
	Total title level holds:	148		
2286100005				
2284100018	Total holdable items:	12		
2282400031	Total number of items:	53		
2282500000	Total holds for my users:	7	Total ho	oldable items owned by my library: 1
	Total holds for users in my group:	141	Total ho	dable items owned by my group: 12
2286100010	73 1			, , , , ,

5.4 MODIFY HOLDS

You can modify holds from the User ID glossary in Display Title Holds. You could also modify holds by going directly to the Modify Holds for User wizard in the Holds group. Modify Holds allows you to change the pickup location, Expiration date, and suspension dates of one, all, or selected holds associated with a user.

Jser Informatio		dify Holds for User : Alfieri, Do	leres		
Name: Profile name: Jser categone	AI s: NONE	Modify Holds Fields		ou /01910	
dentify User		Pickup at:		Expires:	*
User ID: 22		Date suspended: Comment: C Append C R	∙ eplace (° Rei	Date unsuspended:	
list of Holds					
Select All					
Modify »	Title			OK Cancel	
V	Working an.				
V	and the second second	STANDARD SUFFERN		4/14/2012 (unavailable	

5.5 REORDER A HOLD QUEUE

As already mentioned, the hold queue should only be reordered under special circumstances: mainly if a hold has been unfilled for so long that it expired, but the patron is willing to wait longer (but not be put back at the end of the queue). Another example might be if an available hold (i.e. on the hold shelf) expired because the patron was unable to pickup the item due to emergency closings by the library. The Reorder Hold Queue wizard presents the date sorted hold queue. A right-mouse click over a selected user ID will bring up a prompt to cut that user hold out of its current location. You would then go to the desired spot in the list and highlight that line. Then use the right mouse-click again to paste the copied user hold either before or after your desired spot.

Keorder Hold Queue			
Bossypants / Fey,	Tina, 1970-		
User ID	User Name	Range	
22861000054931	Feldman, Elisabet		
22841000182320	Reynolds, Veronica	SYSTEM	
22824000314374	Lem, Betty	SYSTEM	
2282500000934 4	Insert Row Before	YSTEM	
228610001008	Insert Row After	YSTEM	
228370003991(228220000865;		YSTEM YSTEM	
228220000885. 2282500061877T	Dinkes, Kita M.	SYSTEM	
22806000191464	Belasco, Julie M.	SYSTEM	

5.6 **REMOVE HOLDS**

We saw earlier that holds can be removed (cancelled) from the Display Title Holds list, by bringing up the glossary for a selected user ID. You can also use the Remove Hold for User or Remove Item Holds wizards, depending on whether you start with a User or a Title. These wizards are straightforward: identify the user (or title), bring up the list of holds (users or titles). Select one, several, or all hold rows. Then hit the Remove Holds button.

							PHON
							Email:
of Holds							
0-1							
Select All							
Remove	Title		Level	Sta	itus	Pick	up at
•	The Three muskete	TITLE		(unavailab	le)		WARWICH
	Into the woods [DVD]	TITLE		(unavailab	le)		WARWICH
v	Midsomer murders	COPY		(unavailab	le)		WARWICH
v	Nosferatu [DVD] : a	TITLE		(unavailab	le)		WARWICH
	Through the looking	TITLE		(unavailab	le)		WARWICH
	Guys read : funny b	TITLE		(unavailab	le)		WARWICH
	The help	TITLE		(unavailab	le)		WARWICH
	Fodor's upClose Sa	COPY		(unavailab	le)		WARWICH
						1	1
			Get User	Remove	Remove	Holds	Close
			Information	Holds	for Anoth	er User	Ciuse

5.7 ONSHELF ITEMS

The Onshelf Item list presents a report of your library's items that are available to fill holds. By default it is sorted strictly by call number, but

if you click on the Current Location column, the report will be re-sorted by location with a call number sub-sort. This would likely be the sort you would make before printing the report and going to your stacks to retrieve the items. (Using File->Print from the menu bar will give you added options for print formatting). Bring the pile of retrieved items back to the workstation to resolve items on the report. For the items you found, highlight the item on the report and then click on **Trap Hold for Selected Copy** — If the hold pickup location was your library, the Current Status of Item window opens. To confirm the proposed action, click **Make Hold Available**, and the selected item will be trapped for the hold. If the pickup location was a different library, a Transit message will appear and a Transit slip will be printed. If you click **Cancel**, the hold is not trapped, and you are returned to the list.

a						
On shelf: 64						
Onshelf Hold Items	: GRAHAMSVIL					
Call Number »	Title	Author	Item ID	Item type	Current location	Da
006.7 JOH	Microsoft Expres	Johnson, Steve,	32813000528115	MAINBK-O	NONFIC-A	
242 FRA	Introduction to th	Francis, de Sales	32813000369304	MAINBK-O	NONFIC-A	
248.4 CLO	Boundaries : whe	Cloud, Henry.	32813000533289	MAINBK-O	NONFIC-A	
291.44 DYE	Dr. Wayne Dyer's	Dyer, Wayne W.	32813000397297	MAINBK-O	NONFIC-A	
294.3 NHA	Thich Nhat Hanh	Nhtht Hanh, Th'ch.	32813000275576	MAINBK-O	NONFIC-A	
330.97 KOR	Agenda for a ne	Korten, David C.	32813000509875	MAINBK-O	NONFIC-A	
332.63 GRE	You can be a sto	Greenblatt, Joel	32813000373272	MAINBK-O	NONFIC-A	
613 POL	In defense of foo	Pollan, Michael.	32813000478238	MAINBK-O	NONFIC-A	
613.2 CAS	Gluten-free diet :	Case, Shelley, 19	32813000459345	MAINBK-O	NONFIC-A	
616.132 DAS PB	The DASH diet fo	Moore, Thomas J	32813000345536	MAINBK-O	NONFIC-A	
617.56 MCK 1998	Treat your own b	McKenzie, Robin,	32813000132314	MAINBK-O	NONFIC-A	
618.45 DIC	Childbirth without	Dick-Read, Grant	32813000480408	MAINBK-O	NONFIC-A	
635 LOV	Sunflower house	Lovejoy, Sharon,	32813000089555	MAINBK-O	NONFIC-A	
940.54 VAS	Berlin diaries, 19	Vassiltchikov, Ma	32813000303147	MAINBK-O	NONFIC-A	
945.092 ITA	Italy	Cagnoni, Romano.	32813000061281	MAINBK-O	NONFIC-A	
970.3 KEL	My captivity amo	Kelly, Fanny, 184	32813000105252	MAINBK-O	NONFIC-A	
B BERNSTEIN	The invisible wall	Bernstein, Harry,	32813000556967	MAINBK-O	BIOG-A	
B HAYWARD	Haywire	Hayward, Brooke	32813000066694	MAINBK-O	BIOG-A	
		Trap Ho Selected		Unfill Hold	Print Close	

For items on the report that you did not locate, **Mark Item Missing** — If you click this button, the selected item will be marked as MISSING. Click **OK** to mark the item MISSING, and the Onshelf Hold Items list is updated. If you click **Cancel**, the item is not marked MISSING, and you are returned to the list.

If you located the item, but now note it is too damaged to circulate or should not have been available for holds, use **Unfill a Hold** — If you click this button, the selected copy will no longer be used to fill the hold. The next available item (which may be at your library or at other

libraries) will be used to fill the hold. Click **OK** to unfill the hold, and the Onshelf Hold Items list is updated. If you click **Cancel**, the hold is not unfilled, and you are returned to the list.