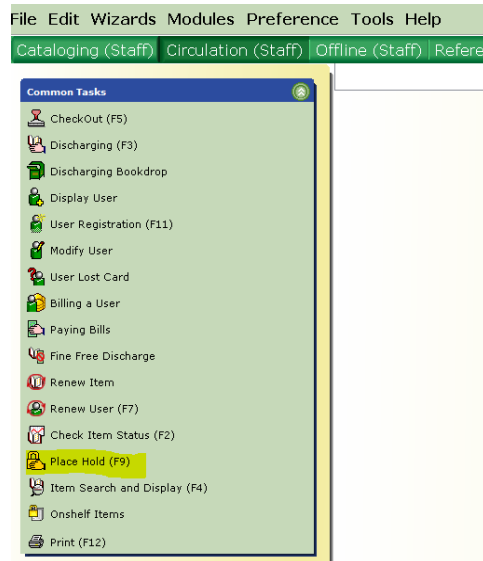


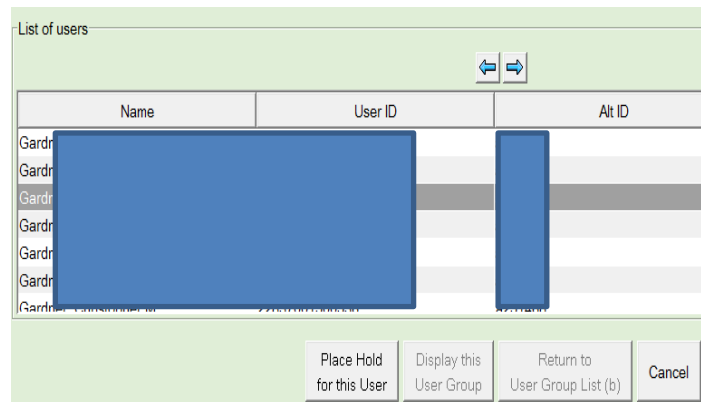
## 5. REQUESTS AND HOLD MANAGEMENT

### 5.1 PLACING HOLDS VIA WORKFLOWS

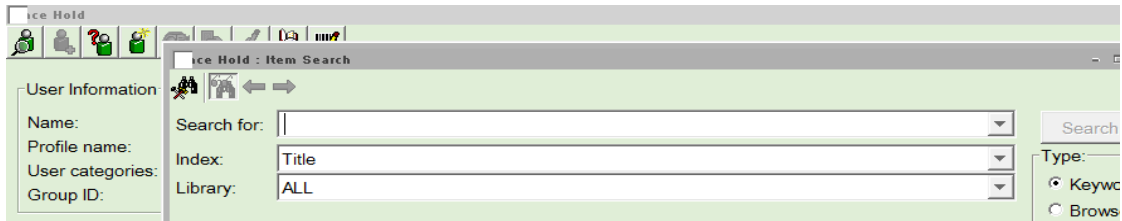
To place a hold for a user, use the Place Hold wizard in the Circulation module Common Tasks wizard group. The Place Hold Wizard assumes that you would first do a User Search, identify a user, and then perform an item search. Open the Place Hold wizard.



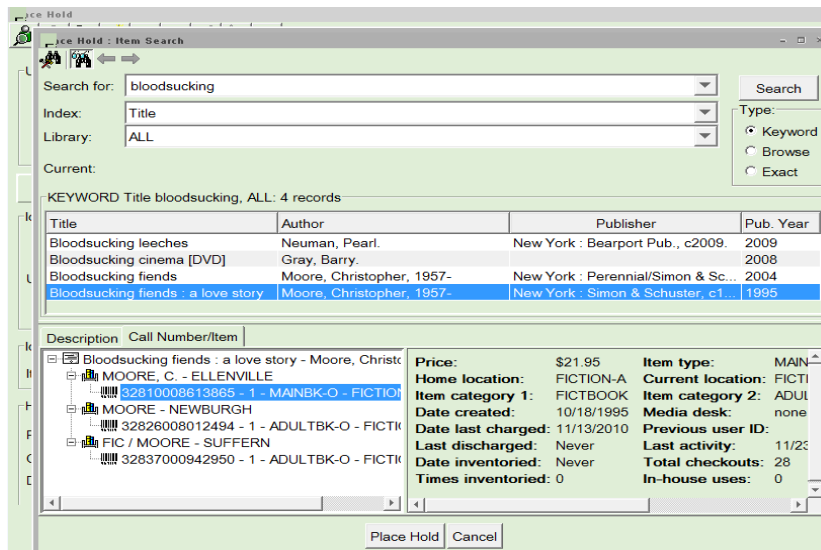
Find the user for whom the hold is to be placed using the User Search routine. Then, once you have highlighted the desired user, click on the Place Hold for This User button.



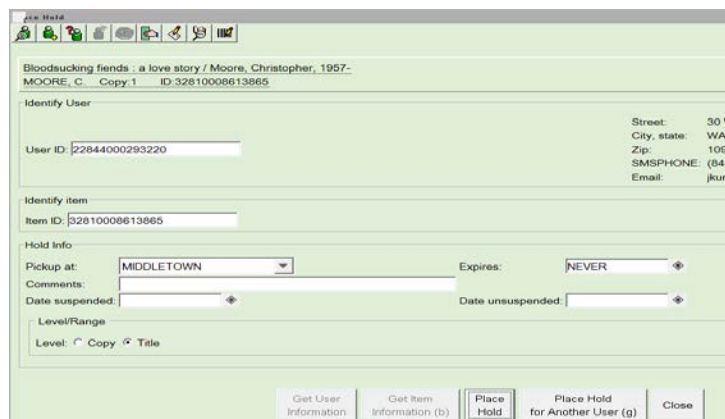
If the user comes up as blocked, override using the password (assigned to your library). Once you have selected a user, an Item Search screen appears over the Place Hold screen:



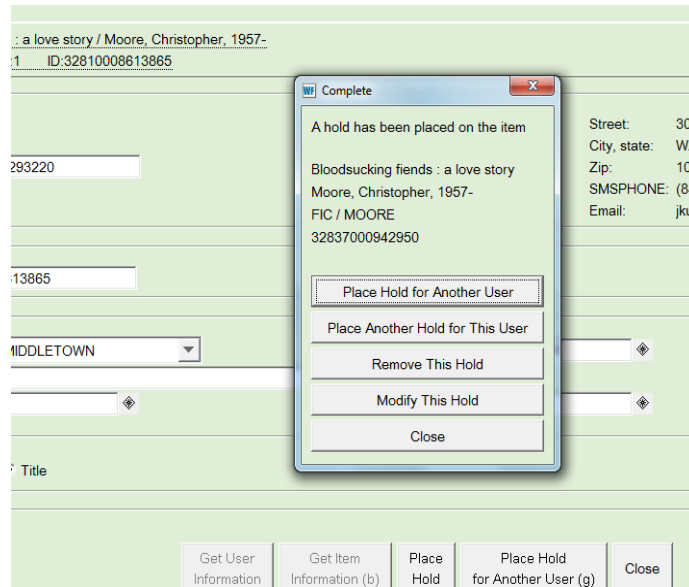
After you perform a catalog search, highlight the desired title from the hit list and examine the call and item records associated with it:



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.



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:



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.

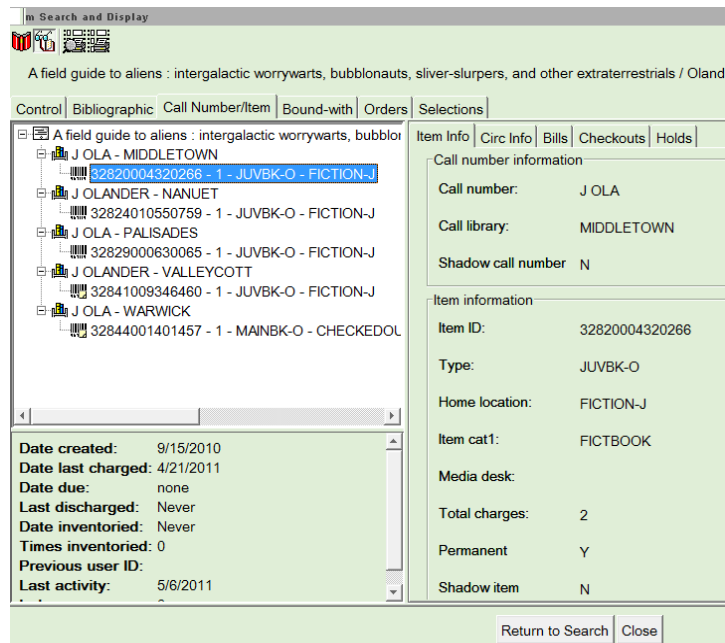
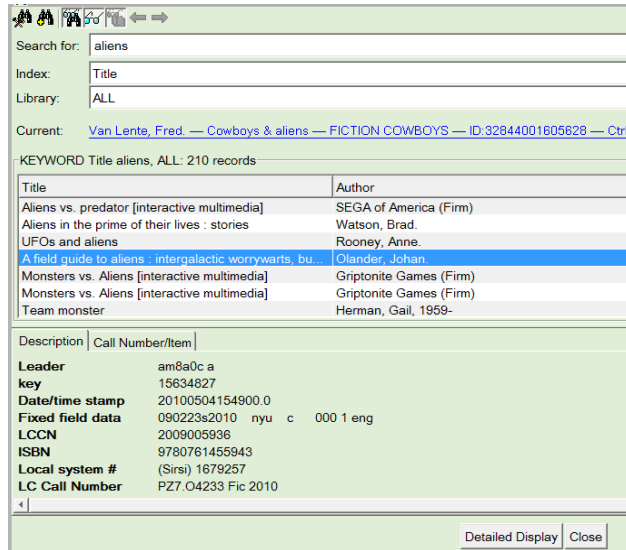
Title	Author
Around San Francisco with kids	Norton, Clark
Fodor's upClose San Francisco	
Fodor's exploring San Francisco	Sinclair, Mick.
Fodor's citypack San Francisco	Sinclair, Mick.
Fodor's ... San Francisco	Fodor's Travel Publications, I

Description	Call Number/Item	Price:
917.94 FODOR 2011 - BLAUVELT	32802000853813 - 1 - ADULTBK-O - NO	Home
917.9404 FOD 2011 - CENTVALLEY		Item c
917.946 FODOR'S 2009 W/PULLOUT MAP	32805000434914 - 1 - ADULTBK-O - NO	Date c
917.94 FOD 2007 - FLORIDA	32807001082759 - 1 - ADULTBK-O - TR	Date l
		Last d
		Date i

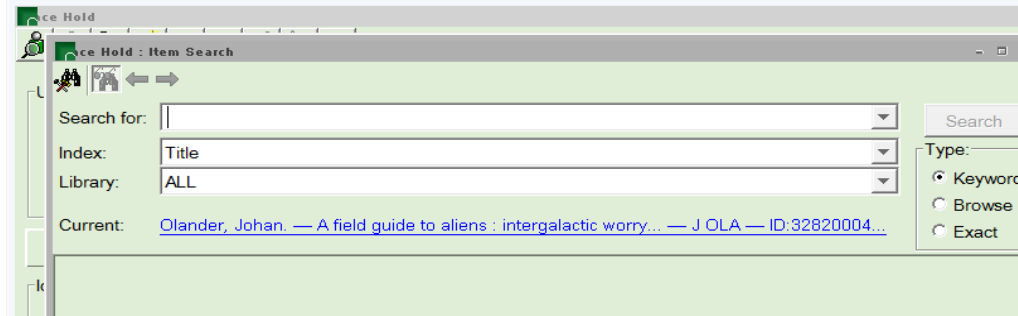
If you wanted a copy-level hold (one specific item at one library), highlight that barcode and on the Place Hold confirmation screen change the Level/Range from Title to Copy.

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:



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:



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:

1.



**Title** [CLICK ON TITLE FOR DETAIL] **The reckoning** **Place Hold**  
**Author** Grisham, John author. Grisham, John author.  
**The reckoning**  
**Personal Author** Grisham, John author.  
**Publication Information** New York : Doubleday, [2018]  
**Publication Date** 2018  
**Format:**   
**Holds: 441**  
**Copies: 133**

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)** ✕

<b>Title</b>	<b>Pickup Library:</b>
<b>The reckoning</b>	Warwick-Albert Wisner Public Library <span style="float: right;">▼</span>

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.

Personal Information
 Checkouts
 Holds
 Fines !

▶ Digital Holds
▼ Library Holds

**Items on Hold: 1**  
**Ready for Pickup: 0**

Cancel Hold(s)

Edit Pickup Location(s)

Suspend Hold(s)

Cancel Hold Suspension(s)

Select All

		Title/Author	Status	Pickup at	
⊖	<input type="checkbox"/>	<b>The reckoning</b> Grisham, John GRISHAM	Pending	Warwick-Albert Wisner Public Library	442

Select All

Cancel Hold(s)

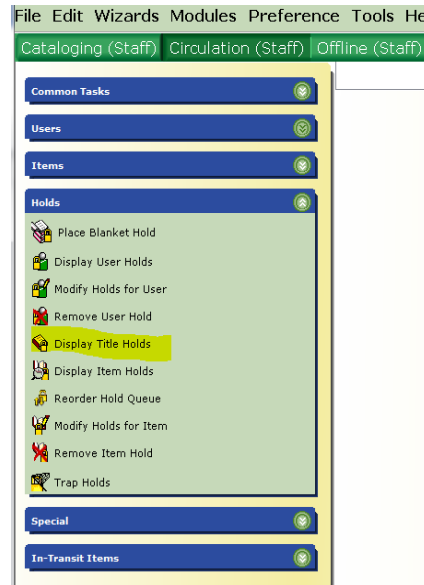
Edit Pickup Location(s)

Suspend Hold(s)

Cancel Hold Suspension(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).



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:

The screenshot shows the 'Display Title Holds' window. At the top, the title is 'Boesypants / Fey, Tina, 1970-'. Below the title, there are statistics: Total number of items: 53, Total holdable items: 11, Total title level holds: 147, Total system range holds: 147, Total group range holds: 0, and Total library range holds: 0. Below the statistics is a table titled 'List of Holds' with the following columns: User ID, User Name, Range, Status, Placed, Pickup at, Pickup by, Expires, Suspended, and Unsuspended.

User ID	User Name	Range	Status	Placed	Pickup at	Pickup by	Expires	Suspended	Unsuspended
2286100005	Feldman, Elis	SYSTEM	(unavailable)	4/6/2011	FALLSBURG		5/15/2012		
2284100018	Reynolds, Ve...	SYSTEM	(unavailable)	4/6/2011	NEWCITY		4/5/2012		
2282400031	Lem, Betty	SYSTEM	(unavailable)	4/10/2011	VALLEYCOTT		4/8/2012		
2282500000	Scott, Margaret	SYSTEM	(unavailable)	4/11/2011	NYACK		4/10/2012		
2286100010	Elbogen, Will	SYSTEM	(unavailable)	4/13/2011	MONTECELLO		4/12/2012		
2283700039	Alferi, Dolores	SYSTEM	(unavailable)	4/15/2011	SUFFERN		4/14/2012		
2282200008	Callahan, An	SYSTEM	(unavailable)	4/15/2011	MONTGOME...		4/14/2012		
2282500061	Dinkes, Rita M.	SYSTEM	(unavailable)	4/16/2011	NEWCITY		4/15/2012		
2280600019	Belasco, Julie	SYSTEM	(unavailable)	4/17/2011	CHESTER		4/16/2012		
2283700047	Goldberger, ...	SYSTEM	(unavailable)	4/17/2011	SUFFERN		4/16/2012		

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...	SYSTEM	(unavailable)
2282400031...	Lem, Betty	SYSTEM	(unavailable)
2282500000...	Scott, M...	SYSTEM	(unavailable)
2286100010...	E...		(unavailable)
2283700039...	A...		(unavailable)
2282200008...	C...		(unavailable)
2282500061...	C...		(unavailable)
2280600019...	E...		(unavailable)
2283700047...	C...		(unavailable)

Bill User for Hold
Display Item
Display User
Edit Item Note
Modify Hold
Place Hold
Remove Hold
Reorder Hold 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.

**Display Title Holds : Detailed Hold Count**

Bossypants / Fey, Tina, 1970-  
B FEY ID:32805000443071

Selection Criteria

Library:  Level:  Copy  Volume  Title

For:  My library  My group  All

User ID	counters
2286100005...	Total title level holds: 148
2284100018...	Total holdable items: 12
2282400031...	Total number of items: 53
2282500000...	Total holds for my users: 7
2286100010...	Total holds for users in my group: 141

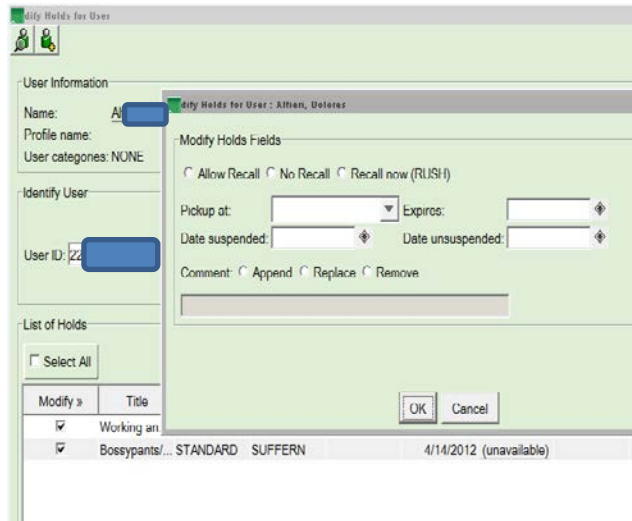
Total holdable items owned by my library: 1  
Total holdable items owned by my group: 12

## 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.



## 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.

Reorder Hold Queue

Bossypants / Fey, Tina, 1970-

User ID	User Name	Range
22861000054931	Feldman, Elisabet...	SYSTEM
22841000182320	Reynolds, Veronica	SYSTEM
22824000314374	Lem, Betty	SYSTEM
22825000009344	Scott, Ma...	SYSTEM
22861000100890	Elbogen, William	SYSTEM
22837000399161	Alfieri, Dolores	SYSTEM
22822000086539	Callahan, Angela	SYSTEM
22825000618771	Dinkes, Rita M.	SYSTEM
22806000191464	Belasco, Julie M.	SYSTEM

Bossypants / Fey, Tina, 1970-

User ID	User Name	Range
22861000054931	Feldman, Elisabet...	SYSTEM
22841000182320	Reynolds, Veronica	SYSTEM
22824000314374	Lem, Betty	SYSTEM
22825000009344	Scott, Ma...	SYSTEM
22861000100890	Elbogen, William	SYSTEM
22837000399161	Alfieri, Dolores	SYSTEM
22822000086539	Callahan, Angela	SYSTEM
22825000618771	Dinkes, Rita 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.

PHONE1:  
Email:

List of Holds

Select All

Remove	Title	Level	Status	Pickup at
<input checked="" type="checkbox"/>	The Three muskete...	TITLE	(unavailable)	WARWICK
<input type="checkbox"/>	Into the woods [DVD]	TITLE	(unavailable)	WARWICK
<input checked="" type="checkbox"/>	Midsomer murders. ...	COPY	(unavailable)	WARWICK
<input checked="" type="checkbox"/>	Nosferatu [DVD] : a ...	TITLE	(unavailable)	WARWICK
<input type="checkbox"/>	Through the looking...	TITLE	(unavailable)	WARWICK
<input type="checkbox"/>	Guys read : funny b...	TITLE	(unavailable)	WARWICK
<input type="checkbox"/>	The help	TITLE	(unavailable)	WARWICK
<input type="checkbox"/>	Fodor's upClose Sa...	COPY	(unavailable)	WARWICK

Get User Information    Remove Holds    Remove Holds for Another User    Close

## 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.

Onshelf Items

On shelf: 64

Onshelf Hold Items: GRAHAMSVIL

Call Number »	Title	Author	Item ID	Item type	Current location	Date
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...	Nhht 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...	32813000066894	MAINBK-O	BIOG-A	

Trap Hold for Selected Copy    Mark Item Missing    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.