

SECTION IX PLACING AND MANAGING HOLDS

Table of Contents

A.	OVERVIEW OF HOLDS.....	2
B.	PLACING HOLDS IN THE STAFF CLIENT.....	3
C.	DISPLAYING HOLDS IN THE STAFF CLIENT.....	8
D.	SUSPENDING OR CANCELING HOLDS IN THE STAFF CLIENT	10
E.	PATRON'S HOLD HISTORY	16
F.	FILLING HOLDS AT CHECK-IN	16
G.	HOLD PICKUP AUTHORIZATION	18
H.	HOLD SHELF ACTION REPORT: RUNNING AND PROCESSING.....	20
I.	HOLDS QUEUE REPORT: RUNNING AND PROCESSING.....	21
J.	BOOK GROUP HOLDS/MULTIPLE COPY REQUESTS	24
K.	HOLD NOTIFICATION	29
L.	OTHER CIRCULATION/HOLD REPORTS	29
M.	ITEMS MISSING FROM YOUR HOLD SHELF	29
N.	WRONG HOLD SHELF.	30
O.	REDUCED TRANSPORTATION HOLDS	32
P.	CHANGING THE PICKUP LOCATION OF AN UNFILLED HOLD	33
Q.	EXTENDING THE HOLD SHELF EXPIRATION DATE	34

A. OVERVIEW OF HOLDS

Placing a "hold" on a title or an item allows staff and patrons to reserve materials that are currently checked out, on the shelf at another location or otherwise temporarily unavailable for immediate checkout. In the LINKCAT libraries, almost all resources are shared, and a title-level hold may be filled by any available copy in the database. When more than one patron places a hold on the same title, the name of each patron is placed in a hold queue (waiting list) in the date order of request. If copies of the title have the status of "Available" when the hold is placed, a hold for that title will appear on the Holds Queue report of the first library with an item available.

When an item that can fill holds is checked in at any LINKCAT library, the system will trap that item for the first active hold with that check-in location selected as the pickup location. If there is no active hold at that check-in location, the item will be trapped for the first active hold in the queue, regardless of pickup location. These rules are based on the parameters for Reduced Transportation Holds functionality. More information about Reduced Transportation Holds functionality is located in **Part O** of this Section.

The status of a pending unfilled hold can be changed from Active to Suspended by the patron, or by a staff member. Patron and staff can, when suspending a hold, set the activation date of the hold to occur automatically on a future date (Resume by). No item will be trapped for a patron's hold until the hold is changed to Active or the Resume date has been reached.

In the staff client, staff can change the status of a patron's hold in either the list of Holds on the bibliographic record or from the patron's Holds List. See **Part D** of this section for further details.

A patron CANNOT place a hold on an item if any of these conditions apply:

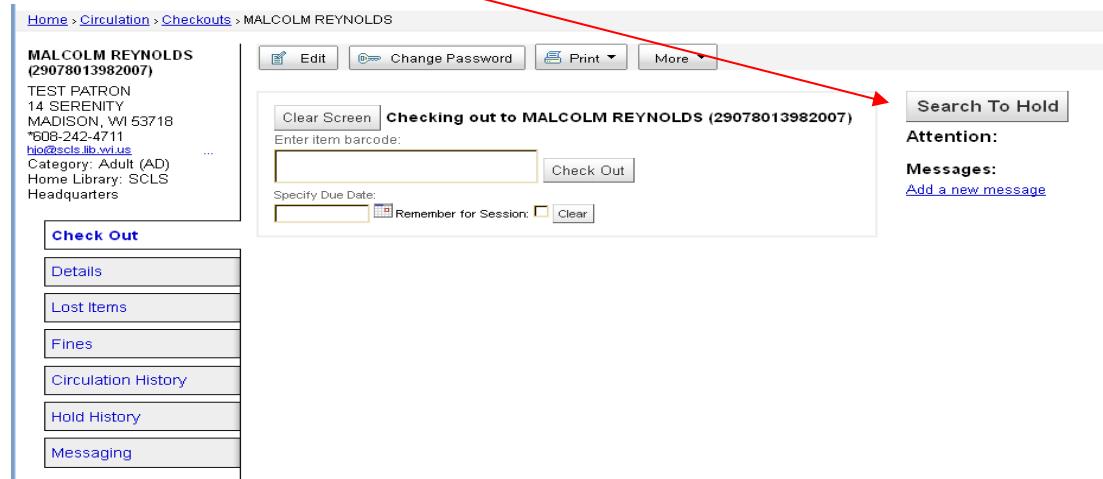
- The item is a non-circulating item or the item allows no holds. See [Section X Circulation Codes](#) **Parts B** and **C** for item-specific policies.
- The item has a status of "Available" at the library where the hold is being placed from the library's catalog AND the patron is in the library building.
 - In this case, Koha assumes the item is available on the library shelf and the patron can go to the shelf. (In this situation, if the item is not really on the shelf, changing the item's status to "Trace" will allow a hold to be placed unless that item was the only copy in the system).
- The patron's library record has a problem which prevents the patron from placing a hold. See [Section VI Circulation Blocks, Notes and Attention messages](#) for more information.
- The item record processing was incomplete; check to see if the item's record contains an Item Type code. If it does not, contact the owning library.

B. PLACING HOLDS IN THE STAFF CLIENT

Placing a hold from the patron's record:

In the patrons' Check Out screen:

Click the Search to Hold button.



- This will take you to a pop-up labeled "Search to Hold". Don't forget because you will want to remember to exit out of this pop-up at the end of your task.
- In the search screen, use the drop down menus to search for specific data points or use the default keyword search.

Advanced Search

Search for:

Keyword: serenity dvd
and Keyword:
and Keyword: [+]

Search [+/- Subtypes] [+/- Language] [+/- Date] [+/- Location] [+/- Sort By] [Fewer Options] [New Search]

Subtypes: Any audience, Any Content, Any Format

Language: No Limit

Publication Date Range: For example: 1999-2001. You could also use "-1987" for everything published before 1987 or "2008-" for everything published after 2008.

Location and availability: All libraries, Only items currently available for loan or reference

Sort by: Relevance

Search [+/- Subtypes] [+/- Language] [+/- Date] [+/- Location] [+/- Sort By] [Fewer Options] [New search]

- When you have found the item, click the “Hold for [patron name]” button.

The screenshot shows a search results page titled "Search To Hold". The search term entered is "text:(serenity dvd)". The results table has two columns: "Results" and "Location".

Results:

- Serenity (DVD) [videorecording]**
by Whedon, Joss; Fillion, Nathan; Torres, Gina; Tudyk, Alan; Baccarin, Morena; Baldwin, Adam; Green, Jack N; Newman, David; Mendel, Barry. -- Universal Pictures (Firm). Mutant Enemy Inc
Edition: Widescreen ; closed-captioned.
Type: Visual Material; Type of visual material: videorecording ; Audience: General;
Publisher: Universal Pictures, c2005.
Other title: Serenity.
Availability: Copies available for loan: Columbus Library [DVD SER] (1), Cross Plains Library [DVD SERENITY] (1), DeForest Library [DVD SER] (1), Lodi Library [DVD 0275] (1), Madison PL-Ashman [Serenity DVD] (2), Madison PL-Central [Serenity DVD] (2), Madison PL-Hawthorne [Serenity DVD] (1), McFarland - E.D. Locke Library [DVD FEATURE SER] (1), Monona Library [DVD Ser] (1), Poynette Library [DVD SER] (1), Reedsburg Library [SERENITY] (1), Spring Green Library [SER] (1), Sun Prairie Library [General DVD Ser] (1), Waunakee Library [SERENITY] (1). Lost (1). In transit (1).
Hold for MALCOLM REYNOLDS
- Sentimental serenity (DVD) [videorecording] / Journey three. Scenes from the Southeast**
by Delaney, James P. -- Sentimental Productions; Delaney Communications
Edition: Widescreen.
Type: Visual Material; Type of visual material: videorecording
Publisher: Delaney Communications, c2011.
Other title: Sentimental serenity.; Scenes from the Southeast (DVD); Scenes from the Southeast.
Availability: Copies available for loan: Baraboo Library [DVD 917 SEN J3] (1), Reedsburg Library [DVD 917.5 Journey] (1).
Hold for MALCOLM REYNOLDS
- Sentimental serenity (DVD) [videorecording] / Journey four. Scenes from New England**
by Delaney, James P. -- Sentimental Productions; Delaney Communications
Edition: Widescreen.
Type: Visual Material; Type of visual material: videorecording ; Audience: Adult;
Publisher: Delaney Communications, c2011.
Other title: Scenes from New England (DVD); Scenes from New England; Sentimental serenity..
Availability: Copies available for loan: Baraboo Library [DVD 917 SEN J4] (1), Reedsburg Library [DVD 917.404 Journey] (1).
Hold for MALCOLM REYNOLDS
- Sentimental serenity (DVD) [videorecording] / Journey one. Scenes across the land**
by Delaney, James P. -- Sentimental Productions; Delaney Communications

Location:

- 30 items, 16 available:**
16 available:
 - Madison PL-Central 1ST FLOOR [\[Serenity DVD\]](#) (1)
 - Madison PL-Central STORAGE, ASK STAFF FOR HELP [\[Serenity DVD\]](#) (1)
 - Madison PL-Central STORAGE, ASK STAFF FOR HELP [\[Serenity DVD\]](#) (Lost) (1)
 - Bookmobile-Dane County Library ADULT [\[DVD SER\]](#) (On hold) (1)
- 2 items, 2 available:**
2 available:
 - Baraboo Library ADULT [\[DVD 917 SEN J3\]](#) (1)
 - Reedsburg Library AUDIOVISUAL [\[DVD 917.5 Journey\]](#) (1)
- 2 items, 2 available:**
2 available:
 - Baraboo Library ADULT [\[DVD 917 SEN J4\]](#) (1)
 - Reedsburg Library AUDIOVISUAL [\[DVD 917.404 Journey\]](#) (1)
- 1 item, 1 available:**
1 available:
 - Reedsburg Library ADULT [\[DVD\]](#)

- You will be in the “Place a hold” screen

The screenshot shows the "Place a hold on Serenity (DVD)" screen. On the left is a sidebar with links: Normal, MARC, ISBD, Items, Edit holds, Place new hold, and Checkout history.

Place a hold on Serenity (DVD)

Hold details:

- Patron:** MALCOLM REYNOLDS (29078013982007)
- Priority:** 2
- Notes:**
- Pickup at:** SCLS Headquarters
- Place a hold on the next available copy**

Place a hold on a specific copy

Hold	Item type	Barcode	Home Library	Call no.	Volume	Information
	DVD, 7 day loan	39078058593253	Waunakee Library	SERENITY		Not on hold
	DVD, 7 day loan	39078061246477	Sun Prairie Library	General DVD Ser		Not on hold
	DVD, 7 day loan	39078058385213	Sun Prairie Library	General DVD Ser		Not on hold
	DVD, 7 day loan	39078055157565	Spring Green Library	SER		Not on hold
	DVD, 7 day loan	39078050973206	Madison PL-Sequoia	Serenity DVD		Unavailable (lost or missing) Not on hold
	DVD, 7	39078061038908	Reedsburg Library	DVD Serenity		Not on hold

- If the patron's normal pickup library is different than the library you are logged in as, you will get the pop-up message "Pickup library is different than [patron's] Home library [LIB]".
- To place a hold for the patron, confirm the "Place a hold on the next available copy" box is checked and click either one of the "Place Hold" buttons.
- When the hold is complete you will be taken to the Edit Holds screen.
 - If you are placing holds on multiple items for the patron at the same time (like several items with the same subject or author) you will be directed back to the patron's Details screen.
 - Remember to close out of the Search to Hold

Home > Catalog > Serenity (DVD) > Edit holds

Edit holds on <u>Serenity (DVD)</u>							
Priority	Patron	Notes	Date	Pickup Library	Details	Suspended	Waiting/ Resume
1	REYNOLDS, MALCOLM 29078013982007	<input type="checkbox"/>	03/15/2013	SCLS Headquarters	Next available	<input type="checkbox"/>	resume on (optional) <input type="text"/>
<input type="button" value="Update Holds"/> Showing 1 to 1 of 1 row Page 1 of 1							

Sometimes staff must place an item-level hold. If you need to do so, follow these steps:

- Follow the steps to get to the "Place a hold" screen.
- Click the radio button of the item on which you wish to place an item-level hold (this will automatically un-check the "Place a hold on the next available copy" box).
- Click either Place Hold button. **Do not place item-level holds for patrons for any item type except magazines OR unless the patron has request a particular physical version (paperback instead of hardback).**
- When the hold is complete you will be taken to the Edit Holds screen.

Home > Catalog > Serenity (DVD) > Edit holds

Edit holds on <u>Serenity (DVD)</u>							
Priority	Patron	Notes	Date	Pickup Library	Details	Suspended	Waiting/ Resume
1	REYNOLDS, MALCOLM 29078013982007	<input type="checkbox"/>	03/15/2013	SCLS Headquarters	Next available	<input type="checkbox"/>	resume on (optional) <input type="text"/>
<input type="button" value="Update Holds"/> Showing 1 to 1 of 1 row Page 1 of 1							

Placing holds from the Catalog:

Click any “Search the Catalog” hyperlink

- Search for the item

The screenshot shows the Koha Cataloging interface. On the left, there's a sidebar with links like News, Circulation, Cataloging, Patrons, and Lists. The main area has sections for News (SCLS Koha SANDBOX), Circulation (Check out to: [text box] OK, Check in Transfers), Cataloging (Add MARC Record, Batch Edit Items, Authorities, Periodicals), and Patrons (Search: [text box] OK, Search catalog: [text box] OK). Below these are links for Acquisitions, Tools, and About Koha.

- Find the record you want and click the Holds hyperlink in the lower right corner.

The screenshot shows the search results for "Dr. Horrible". There are four records listed:

1. Dr. Horrible : and other horrible stories - 5 items, 4 available: 4 available:
Fitchburg Public Library TEEN [TEEN GN WHEDO] (1)
YYY - Madison PL-Storage ADULT [741.5973 W56d] (1)
1 unavailable:
Madison PL-Hawthorne ADULT [741.5973 W56d] (Lost) (1)
2. Dr. Horrible's sing-along blog : the book - 1 item, None available
1 unavailable:
Madison PL-Central NEW ADULT [791.4372 W56] (In transit) (On hold) (1)
3. Dr. Horrible's sing-along blog (DVD) [videorecording] - 6 items, 4 available: 4 available:
Madison PL-Central ADULT [Musical DVD Drh] (1)
Madison PL-Central STORAGE, ASK STAFF FOR HELP [Dr. Horrible's sing-a-long blog DVD] (1)
2 unavailable:
Madison PL-Central 1ST FLOOR [Dr. Horrible's sing-a-long blog DVD] (Lost) (1)
Verona Public Library AUDIOVISUAL [DVD Dr] (In transit) (On hold) (1)
4. Horrible [sound recording] : "if it's really a horrible record - it's bound to be a hit" - 1 item, None available
1 unavailable:
Verona Public Library ADULT [OVERSIZE MISC DR. DEMENTO] (In transit) (On hold) (1)

A red arrow points to the "Holds" link in the fourth record.

- You are now in the “Place a hold” screen of the bibliographic record, which can also be accessed from the “Place New Hold” tab on the left side of the screen.
- Enter the patron’s card number or name in the Patron search box and click the Search button.

[Home](#) > [Catalog](#) > [Dr. Horrible's sing-along blog \(DVD\)](#) > Place a hold on Dr. Horrible's sing-along blog (DVD)

Normal MARC ISBD Items Edit holds Place new hold Checkout history	<h3>Place a hold on Dr. Horrible's sing-along blog (DVD)</h3> <p>Patron: Enter patron card number or partial name: <input type="text"/> <input type="button" value="Search"/></p> <p>Hold details</p> <p>Patron: Not defined yet Priority: 2 Notes: <input type="text"/> Pickup at: SCLS Headquarters <input checked="" type="checkbox"/> Place a hold on the next available copy</p>
--	--

Place a hold on a specific copy

Hold	Item type	Barcode	Home Library	Call no.	Volume	Information
	DVD, 7 day loan	39078070815809	Verona Public Library	DVD Dr		Unavailable (lost or missing) Not on hold
	DVD, 7 day loan	39078070697462	Sun Prairie Library	Musical DVD Drh		Not on hold
	DVD, 7 day loan	39078071249925	Madison PL-Central	Dr. Horrible's sing-a-long blog DVD		Not for loan (In Processing) Not on hold
	DVD, 7 day loan	39078066097297	Madison PL-Central	Dr. Horrible's sing-a-long blog DVD		Unavailable (lost or missing) Not on hold
	DVD, 7 day loan	39078062790739	Bookmobile-Dane County Library	DOC		Not on hold
	DVD, 7 day loan	39078077924190	Rock Springs Library	DVD DR. H		Not on hold
	DVD, 7 day loan	39078078709046	Baraboo Library	TEEN DVD DR. H		Not on hold
	DVD, 7 day loan	39078082181471	Cross Plains Library	DVD DR. HORRIBLE		Unavailable (lost or missing) Not on hold

- The “Place a hold” screen will refresh with the patron information.

[Home](#) > [Catalog](#) > [Dr. Horrible's sing-along blog \(DVD\)](#) > Place a hold on Dr. Horrible's sing-along blog (DVD)

Normal MARC ISBD Items Edit holds Place new hold Checkout history	<h3>Place a hold on Dr. Horrible's sing-along blog (DVD)</h3> <p>Hold details</p> <p>Patron: MALCOLM REYNOLDS (29078013982007) Priority: 2 Notes: <input type="text"/> Pickup at: SCLS Headquarters <input checked="" type="checkbox"/> Place a hold on the next available copy</p> <p><input type="button" value="Place Hold"/></p>
--	---

Place a hold on a specific copy

Hold	Item type	Barcode	Home Library	Call no.	Volume	Information
	DVD, 7 day loan	39078070815809	Verona Public Library	DVD Dr		Unavailable (lost or missing) Not on hold
	DVD, 7 day loan	39078070697462	Sun Prairie Library	Musical DVD Drh		Not on hold
	DVD, 7 day loan	39078071249925	Madison PL-Central	Dr. Horrible's sing-a-long blog DVD		Not for loan (In Processing) Not on hold
	DVD, 7 day loan	39078066097297	Madison PL-Central	Dr. Horrible's sing-a-long blog DVD		Unavailable (lost or missing) Not on hold
	DVD, 7 day loan	39078062790739	Bookmobile-Dane County Library	DOC		Not on hold
	DVD, 7 day loan	39078077924190	Rock Springs Library	DVD DR. H		Not on hold
	DVD, 7 day loan	39078078709046	Baraboo Library	TEEN DVD DR. H		Not on hold
	DVD, 7 day loan	39078082181471	Cross Plains Library	DVD DR. HORRIBLE		Unavailable (lost or missing) Not on hold

- Click either of the “Place hold” buttons.
- When the hold is complete you will be taken to the Edit Holds screen.

Edit holds on Dr. Horrible's sing-along blog (DVD)								
								Sort by Priority <input type="button" value="ASC"/>
Priority	Patron	Notes	Date	Pickup Library		Details	Suspended	Waiting/Resume
1	NAVSARIA, DIPESH 29078014205689	<input type="button" value="Note"/>	02/14/2013	Madison PL-Sequoia	<input type="button" value="Details"/>	Next available	<input checked="" type="checkbox"/>	resume on (optional) <input type="text"/>
2	REYNOLDS, MALCOLM 29078013982007	<input type="button" value="Note"/>	08/02/2013	SCLS Headquarters	<input type="button" value="Details"/>	Next available	<input type="checkbox"/>	resume on (optional) <input type="text"/>

Showing 1 to 2 of 2 rows | Page 1 of 1

[Update Holds](#)

[Place new hold](#)

[Checkout history](#)

C. DISPLAYING HOLDS IN THE STAFF CLIENT

Displaying holds from the patron record:

In the patron’s Details screen, scroll down until you see a row of tabs.

- Click the On Hold tab to display the patron’s holds.

Checked Out	Fines & Charges	On Hold (24)	Revision History							
Branch	Placed	Expires	Title	Note	Item Type	Call Number	Barcode	Rank	Cancel?	Suspend? (all: <input type="checkbox"/>)
SCLS Headquarters	2011-11-28 11:14:10		The Muppet Show, season one (DVD)					1	<input type="button" value="No"/>	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:14:10		The Muppet Show, season one (DVD)					1	<input type="button" value="No"/>	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:15:21		Muppet show, season two (DVD)					1	<input type="button" value="No"/>	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:15:21		Muppet show, season two (DVD)					1	<input type="button" value="No"/>	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:16:45		The Muppet show, season three (DVD)					1	<input type="button" value="No"/>	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:16:45		The Muppet show, season three (DVD)					1	<input type="button" value="No"/>	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>

Columns in the On Hold display in the patron’s Details screen:

Branch: library pickup location

Placed: date hold was placed

Expires: dates hold expires on the hold shelf

Title: title hyperlink to bibliographic record

Note: if staff entered a note when placing the hold, it will display here.

Item Type

Call number: populated when an item has been trapped for the hold.

Barcode: populated when an item has been trapped for the hold, hyperlink to item record.

Rank - different Rank column messages include:

- Number indicates patron’s Priority (place) in the Holds Queue

- Item in Transit from XXX since [date]: item is in transit.
 - Item waiting: item is on the hold shelf waiting for pickup
- Cancel?: cancel a patron hold; see Part D.
 Suspend? (all:_): to suspend a hold; see Part D.

Displaying holds from the bibliographic record:

Search for the item record.

- In the title display screen, click on the Holds hyperlink in the bottom right corner of the record display.

Home > Catalog > Search for 'Castle, the complete first season'

Refine your search

Owning library

- MOO (13)
- REE (13)
- MCF (12)
- MCM (12)
- MID (11)
- CEN (9)
- FCH (9)
- HPB (7)
- STO (7)
- BAR (6)
- QFT (6)
- MTH (6)

more

Available on shelf

38 result(s) found for 'Castle, the complete first season' in LINKcat SANDBOX Catalog.

Select All | Clear All | Unhighlight | Place Hold(s) | Add to List | z39.50 Search | Sort By: Relevance

Results		Location
<p>1. Castle, the complete first season (DVD) [videorecording]. Disc 2</p> <p>by Fillion, Nathan; Katic, Stana. -- ABC Studios; Buena Vista Home Entertainment (Firm)</p> <p>Edition: Widescreen, closed-captioned.</p> <p>Type: Visual Material; Type of visual material: videorecording; Audience: Adult;</p> <p>Publisher: ABC Studios ; Distributed by Buena Vista Home Entertainment, [2009]</p> <p>Other title: Castle, the complete first season ; Castle, the complete 1st season (DVD); Castle, the complete 1st season ; Castle, season one (DVD); Castle, season one ; Castle, season 1 (DVD); Castle, season 1.</p> <p>Availability: Copies available for loan: Pardeeville Library [DVD CAS 1.2] (1), Spring Green Library [CAS SEASON 1] (1).</p> <p>Lost (6)</p> <p>In transit (1).</p>	<p>9 items, 1 available: 1 available: Pardeeville Library AUDIOVISUAL [DVD CAS 1.2] (1)</p> <p>8 unavailable: Baraboo Library AUDIOVISUAL [DVD TVSERIES CASI] (Lost) (1) Madison PL-Ashman ADULT [DVD CASI] (Lost) (1)</p>	
Holds		

- The Holds hyperlink takes you to the “Place a Hold” screen for the bibliographic record.

Home > Catalog > Castle, the complete first season (DVD) > Place a hold on Castle, the complete first season (DVD)

Place a hold on [Castle, the complete first season \(DVD\)](#)

Normal

MARC

ISBD

Items

Edit holds (highlighted with a red arrow)

Place new hold

Checkout history

Modification log

Patron:
Enter patron card number or partial name:
 Search

Hold details

Patron: Not defined yet

Priority: 4

Notes:

Pickup at: SCLS Headquarters

Place a hold on the next available copy

Place a hold on a specific copy

Hold	Item type	Barcode	Home Library	Call no.	Volume	Information
	DVD, 7 day loan	39078073843733	Stoughton Library	DVD CASTLE	1.2	Unavailable (lost or missing) Not on hold
	DVD, 7 day loan	39078073775646	Spring Green Library	CAS SEASON 1	DISC2	Not on hold
	DVD, 7 day loan	39078073684988	Reedsburg Library	DVD Castle	s1d2	Unavailable (lost or missing) Not on hold
	DVD, 7 day loan	39078067207044	Oregon Library	DVD CAS	s.1 d.2	In transit from Oregon Library, to Mount Horeb Library, since 05/02/2012 On hold expected at Mount Horeb Library since 05/02/2012 Cancel hold
	DVD, 7 day loan	39078069624683	McFarland - E.D. Locke	DVD TVSERIES		Unavailable (lost or missing) Not on hold

To see the list of patrons that currently have holds on this bibliographic record, click the Edit Holds tab on the left side of the screen

D. SUSPENDING OR CANCELING HOLDS IN THE STAFF CLIENT

Suspending a hold from the patron record:

In the patron's Details screen, scroll down until you see a row of tabs.

- Click the On Holds tab to display the patron's holds

Checked Out Fines & Charges On Hold (24) Revision History

Branch	Placed	Expires	Title	Note	Item Type	Call Number	Barcode	Rank	Cancel?	Suspend? (all; <input type="checkbox"/>)
SCLS Headquarters	2011-11-28 11:14:10		The Muppet Show, season one (DVD)					1	<input type="button" value="No"/>	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:14:10		The Muppet Show, season one (DVD)					1	<input type="button" value="No"/>	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:15:21		Muppet show, season two (DVD)					1	<input type="button" value="No"/>	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:15:21		Muppet show, season two (DVD)					1	<input type="button" value="No"/>	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:16:45		The Muppet show, season three (DVD)					1	<input type="button" value="No"/>	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:16:45		The Muppet show, season three (DVD)					1	<input type="button" value="No"/>	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>

- To suspend one or more holds, click the check box in the hold's row, then scroll down to the bottom of the page and click the Update Holds button.
- To automatically re-activate the hold on a particular date, click the Resume On Check box in the Suspend column and click your mouse in the field under the word (optional). A calendar widget will pop-up; select the date the hold should resume. Then click the Update Holds button.
- To suspend all holds for a patron, click the (all) checkbox on the column header. Then click the Update Holds button.

Suspending a hold from the bibliographic record:

Search for the item record.

- In the title display screen, click on the Holds hyperlink in the bottom right corner.

(Lost) (1)

3 items, None available

3 unavailable:

- Adams County Library ADULT [DVD_S] (Lost) (1)
- Monroe PL-Green County ADULT [DVD_SER] (In transit) (On hold) (1)

Holds

1 item 1 available.

- The Holds hyperlink takes you to the “Place a Hold” screen for the bibliographic record.

Home > Catalog > Serenity (DVD) > Place a hold on Serenity (DVD)

Place a hold on <u>Serenity (DVD)</u>																													
Patron: Enter patron card number or partial name: <input type="text"/> Search	Hold details Patron: Not defined yet Priority: 3 Notes: <input type="text"/> Pickup at: SCLS Headquarters Place a hold on the next available copy <input checked="" type="checkbox"/>																												
Place a hold on a specific copy <table border="1"> <thead> <tr> <th>Hold</th> <th>Item type</th> <th>Barcode</th> <th>Home Library</th> <th>Call no.</th> <th>Volume</th> <th>Information</th> </tr> </thead> <tbody> <tr> <td>C</td> <td>DVD, 7 day loan</td> <td>39078070851325</td> <td>Verona Public Library</td> <td>DVD Ser</td> <td></td> <td>Not on hold</td> </tr> <tr> <td>C</td> <td>DVD, 7 day loan</td> <td>39078062344818</td> <td>North Freedom Library</td> <td>DVD SER</td> <td></td> <td>Not on hold</td> </tr> <tr> <td>C</td> <td>DVD, 7 day loan</td> <td>39078049365225</td> <td>Adams County Library</td> <td>DVD S</td> <td></td> <td>In transit from Black Earth Library, to Cambridge Library, since 06/25/2013 On hold expected at Cambridge Library since 06/24/2013 Cancel hold</td> </tr> </tbody> </table>		Hold	Item type	Barcode	Home Library	Call no.	Volume	Information	C	DVD, 7 day loan	39078070851325	Verona Public Library	DVD Ser		Not on hold	C	DVD, 7 day loan	39078062344818	North Freedom Library	DVD SER		Not on hold	C	DVD, 7 day loan	39078049365225	Adams County Library	DVD S		In transit from Black Earth Library, to Cambridge Library, since 06/25/2013 On hold expected at Cambridge Library since 06/24/2013 Cancel hold
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- Click the Edit Holds tab on the left side of the screen.

Home > Catalog > Serenity (DVD) > Edit holds

Edit holds on <u>Serenity (DVD)</u>							
Sort by <input type="button" value="Priority"/> <input type="button" value="ASC"/> <input type="button" value="DESC"/>							
Priority	Patron	Notes	Date	Pickup Library	Details	Suspended	Waiting/Resume
1	VORPATRIL, IVAN 29078017854129	<input type="button" value=""/>	08/02/2013	Wis. Rapids - McMillan Library	<input type="button" value=""/>	<input type="checkbox"/>	resume on (optional) <input type="text"/>
2	WHITE, BETTY 29078007456034	<input type="button" value=""/>	08/02/2013	Madison PL-Meadowridge	<input type="button" value=""/>	<input type="checkbox"/>	resume on (optional) <input type="text"/>

[Update Holds](#) Showing 1 to 2 of 2 rows | Page 1 of 1

- Click the checkbox in the Suspended column for the patron for whom you are suspending the hold.

okoha

Enter patron card number or partial name: Submit

Check Out | Check In | Search the Catalog

Home > Catalog > Serenity (DVD) > Edit holds

Edit holds on <u>Serenity (DVD)</u>							
Sort by <input type="button" value="Priority"/> <input type="button" value="DESC"/>							
Priority	Patron	Notes	Date	Pickup Library	Details	Suspended	Waiting/Resume
2	WHITE, BETTY 29078007456034	<input type="button" value=""/>	06/07/2012	Wis. Rapids - McMillan Library	<input type="button" value=""/>	<input checked="" type="checkbox"/>	resume on (optional) <input type="text"/>
1	VORPATRIL, IVAN 29078017854129	<input type="button" value=""/>	06/07/2012	Mazomanie Library	<input type="button" value=""/>	<input type="checkbox"/>	resume on (optional) <input type="text"/>

[Update Holds](#) Showing 1 to 2 of 2 rows | Page 1 of 1

- Click the Update Holds button.

Cancelling a hold from the patron record:

In the patron's Details screen, scroll down until you see a row of tabs.

- Click the On Holds tab to display the patron's holds

Branch	Placed	Expires	Title	Note	Item Type	Call Number	Barcode	Rank	Cancel?	Suspend? (all: <input type="checkbox"/>)
SCLS Headquarters	2011-11-28 11:14:10		The Muppet Show, season one (DVD)					1	No	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:14:10		The Muppet Show, season one (DVD)					1	No	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:15:21		Muppet show, season two (DVD)					1	No	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:15:21		Muppet show, season two (DVD)					1	No	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:16:45		The Muppet show, season three (DVD)					1	No	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:16:45		The Muppet show, season three (DVD)					1	No	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>

- In the Cancel column, access the pull down menu and select Yes.

Branch	Placed	Expires	Title	Note	Item Type	Call Number	Barcode	Rank	Cancel?	Suspend? (all: <input type="checkbox"/>)
SCLS Headquarters	2011-11-28 11:14:10		The Muppet Show, season one (DVD)					1	No	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:14:10		The Muppet Show, season one (DVD)					1	Yes	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:15:21		Muppet show, season two (DVD)					1	No	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:15:21		Muppet show, season two (DVD)					1	No	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:16:45		The Muppet show, season three (DVD)					1	No	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2011-11-28 11:16:45		The Muppet show, season three (DVD)					1	No	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2012-03-22 15:47:43		Blood sports / , by Smith, Sherwood.					1	No	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>
SCLS Headquarters	2012-05-01 10:09:38		Drift... , by Maddow, Rachel.					4	No	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>

- Scroll down to the bottom of the page and click the Update Holds button.

Canceling a hold from the bibliographic record:

Search for the item record.

- In the title display screen, click on the Holds hyperlink in the bottom right corner.

Refine your search		Results			
Available on shelf		Sort By:			Location
650 result(s) found for "the book of preserves" in Koha sandbox Catalog.					
Select All Clear All Unhighlight Place Hold(s) Add to List z39.50 Search					
<input type="checkbox"/>	1. The book of preserves : jams, chutneys, pickles, jellies by Norwak, Mary. Type: Book; Format: print ; Literary form: not fiction Publisher: HP Books, c1986. Other title: Preserves. Availability: No copies available On hold(1).				1 item, None available 1 unavailable:     Kilbourn Public Library GENERAL COLLECTION [641.42 NOR] (On hold)(1)
<input type="checkbox"/>	2. The complete book of preserving by Cameron-Smith, Marye. Type: Book; Format: print ; Literary form: not fiction Publisher: Bobbs-Merrill, 1976. Availability: No copies available				1 item, None available 1 unavailable:     Fitchburg Public Library ADULT [641.4 CAM] (In transit (On hold)(1)

- The Holds hyperlink takes you to the “Place a Hold” screen for the bibliographic record.

Home > Catalog - Details for *The book of preserves : jams, chutneys, pickles, jellies /*

[New Record](#) [Edit](#) [Save](#) [Add to List](#) [Print](#) [Place Hold](#) [z39.50 Search](#)

Normal

MARC
ISBD
Items
Edit holds
Place new hold
Checkout history

The book of preserves : jams, chutneys, pickles, jellies /

by [Norwak, Mary.](#)

Type: Book

Publisher: HP Books, c1986 Tucson, AZ.

Description: 128 p. : col. ill. ; 28 cm.

ISBN 0895865076 (pbk.)

Other Title: Preserves.

Related Subjects: [Fruit Preservation](#) | [Jam](#) | [Jelly](#)

[Holdings](#) [Descriptions](#)

Item type	Location	Home Library	Current Library	Collection	Call Number	Status	Last Seen	Barcode	Spine Label
Book, adult, 28 day loan	GENERAL COLLECTION	WID	Kilbourn Public Library	BOOKS AD NFIC	641.42 NOR	Available	02/12/2013	39078036226214	Print Label

- Click on the “Edit Holds” tab.

Home > Catalog > [The book of preserves](#) > Edit holds

Edit holds on The book of preserves :							
Priority	Patron	Notes	Date	Pickup Library	Details	Suspended	Waiting/ Resume
<input type="button" value="1"/>	WHITE_BETTY 29078007456034		04/24/2013	Madison PL-Meadowridge	Next available	<input checked="" type="checkbox"/>	resume on (optional) <input type="text"/>
<input type="button" value="Update Holds"/>				Showing 1 to 1 of 1 row Page 1 of 1			

- Click the pull down option in the Priority column; select cancel.

Home > Catalog > The book of preserves > Edit holds

Edit holds on <u>The book of preserves :</u>								
Normal	Priority	Patron	Notes	Date	Pickup Library	Details	Suspended	Waiting/ Resume
MARC	<input type="text" value="1"/>	WHITE, BETTY 29078007456034		04/24/2013	Madison PL-Meadowridge	<input type="text" value="Next available"/>	<input checked="" type="checkbox"/>	<input type="text" value="resume on (optional)"/>
ISBD								
Items								
Edit holds								
Place new hold								

Showing 1 to 1 of 1 row | Page 1 of 1

Home > Catalog > [The book of preserves](#) > Edit holds

Edit holds on The book of preserves :							
Priority	Patron	Notes	Date	Pickup Library	Details	Suspended	Waiting/ Resume
cancel	WHITE, BETTY 29078007456034		04/24/2013	Madison PL-Meadowridge	Next available	<input checked="" type="checkbox"/>	resume on (optional)
Update Holds							

Showing 1 to 1 of 1 row | Page 1 of 1

- Click the Update Holds button and the hold will be canceled.



Enter patron card number or partial name: [Submit](#)

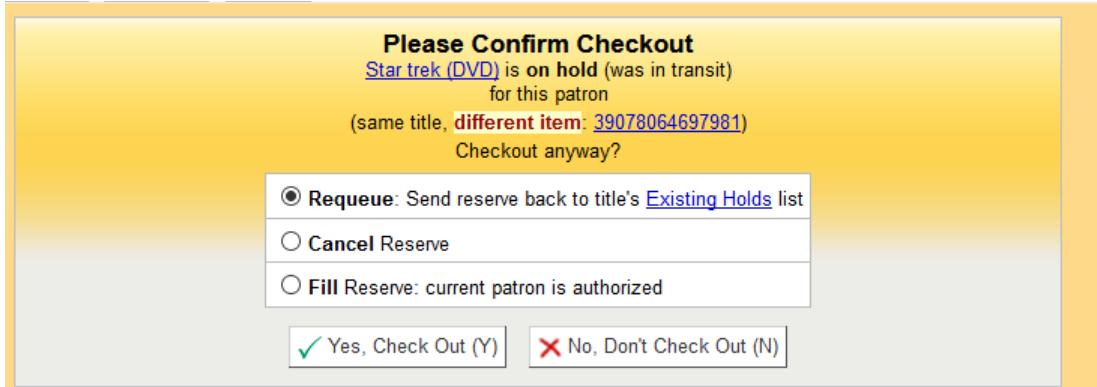
[Check Out](#) [Check In](#) [Search the Catalog](#)

Home > Catalog > [The book of preserves](#) > Edit holds

Edit holds on The book of preserves :							
Priority	Patron	Notes	Date	Pickup Library	Details	Suspended	Waiting/ Resume
There are no holds - Place a hold							

[What happens when staff cancel an In-Transit hold?](#) There are two common reasons why staff may want to cancel the hold on an item in transit to fill a patron's hold.

- Item is on the Long in Transit report and you want to re-place a hold for the patron. Use the above method for canceling the hold; change the Priority from In Transit to Cancel and click the Update button to save your changes. The original item will remain "in-transit" to the pickup location until the owning library takes action. If the problem is that the wrong pickup location was selected for the hold, please see **Part P** of this Section for a resolution instead of canceling the hold.
- Staff can also cancel the hold on an in-transit item if the patron walks into their library and checks out an item from the same bib record.
 - Staff will see this pop-up and should select the "Cancel Reserve" option.



- Cancel Reserve will remove the hold from the patron's list of current holds and will record the canceled hold in his Hold History, including the item barcode.
- HOWEVER, the item that had been on hold will still be in transit to the pickup location. Library staff will receive the item with a Post-It note on it, indicating the items has arrived to fill a hold.
- At Check-in, the screen will display a pop-up stating "Item not checked out". ***Library staff will have to check in the item a second time to either send it back to the owning library or trap the item for another hold.***

Can patrons cancel In-Transit holds?

- No, they can't. Only staff can cancel in-transit holds.

What happens when staff cancel the hold for an item already on the hold shelf for a patron?

- Staff have to cancel the hold from the patron's Details page, changing the status in the Cancel column to Yes and clicking the Update Holds button.
- The cancelled hold will display immediately in the patron's Hold History, and will include the barcode of the item that had been trapped for the patron's hold.
- The cancelled hold will be reported on the pickup library's Holds Shelf Action report the day after cancellation

Can patrons cancel holds on items that are already on the hold shelf?

- Yes, patrons can cancel items on the hold shelf for them using Harriet/Talking Tech. Patrons cannot cancel items on their hold shelf from their PAC account.
- The cancelled hold will display immediately in the patron's Hold History, and will include the barcode of the item that had been trapped for the patron's hold.
- The cancelled hold will be reported on the pickup library's Holds Shelf Action report the day after cancellation.

E. PATRON'S HOLD HISTORY

Go to [Section XI Circulation History and Hold History](#) for information about a patron's Filled holds, Canceled holds and Expired holds.

F. FILLING HOLDS AT CHECK-IN

If an item is checked in at your library and is **trapped for a hold with your library as a pickup location**, the system will provide a "Hold Found" pop-up message with the following information:



- Click the "Confirm Holds" button if you create your own hold shelf slips OR
- Click the "Print Slip and Confirm" button if you print your Hold Found slips using a receipt printer.

When the hold is **checked in at the pickup location**, the system will generate a "Holds Waiting:" message on the patron's Check Out screen.

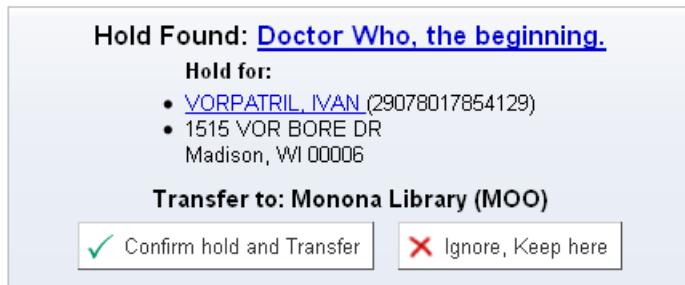
<input type="button" value="Search To Hold"/>
Attention:
Holds Waiting:
> Moon / 39078032851249 by Herbert, James, placed on 2011-04-11 20:19:35 Waiting at SCLS Headquarters SCA
Messages:
Add a new message

The system will generate a "Hold Available for Pickup" message to be delivered to the patron, depending on their messaging preferences.

- Email notices are generated every hour, on the ½ hour;
- Phone notices are accumulated in a file that will be called out the next morning;
- Text messages are accumulated in a file that will be delivered the next morning and
- Print notices are accumulated in a file that will be placed in a print directory, for each library, the next morning.

See [Section XIII Messaging preferences, Messaging Queue and Notices](#) for more information on how notices are delivered.

If an item is checked in at your library and is **trapped for a hold for pickup at another library**, the system will provide a “Hold Found” pop-up message with a “**Transfer to: LIB**” line.



- Click the Confirm Hold and Transfer message.
- Fill out a Post-It note with the three letter [Delivery Code](#) for the item’s destination and;
- Put the item in a delivery bin.
- Information in the Normal screen of the bibliographic record will record that the item is In Transit from your location to the hold destination as of the date of Check in.
- When the item is checked in at the pickup location, the pop-up message at the beginning of this Part will display.
- WARNING – If the item is checked in a second time, a different pop-up message will appear and [the expiration date does not print](#). DO NOT print the slip from the pop-up created from the second check in. Instead, fill out a Post-It note with the three letter [Delivery Code](#) for the item’s destination.
- A hold is only considered “filled” when it is checked out to the patron.

If an item is checked in at your library and is **trapped for a hold for one of the libraries in SCLS that are not part of the shared Koha/LINKcat database**

- Albertson Memorial Library (Albany)
- Everett Roehl Marshfield Public Library
- Monticello Public Library
- Pittsville Community Library
- Rio Community Library
- Lester Public Library of Vesper

go to **Section II Check Out, [Part F](#) Direct Check Out to SCLS non-LINKCAT Libraries and use the instructions found there.**

G. HOLD PICKUP AUTHORIZATION

When one patron has permission to pick-up another patron's holds, and the [LINKcat Holds Pickup Authorization form](#) has been filled out and signed, the Holds Pickup Authorization (HPA) information should be on display in each patron's Check Out screen under the Messages header. [In the HPA message, please write the patron's name exactly as it appears in Koha, to make it easier to verify.]

For example, Abbie Frankenstein has permission to pick-up and check out Willy Frankenstein's holds.

The screenshot shows the Koha circulation interface. On the left, Abbie N. Frankenstein's profile is displayed, including her address (1001 CREEPY LANE #2, MADISON WI 53713), email (hip@scsl.lib.wi.us), and category (Adult (AD)). On the right, a 'Check Out' screen is shown for Abbie. In the 'Messages' section, there is a message from 'Willy' dated 05/14/2013: "Hold Pickup Authorization for Willy Frankenstein" [Delete].

And Willy has reciprocal permission to pick-up and check out Abbie's holds.

The screenshot shows the Koha circulation interface. On the left, Willy Igor Frankenstein's profile is displayed, including his address (1313 MOCKINGBIRD LN, Black Earth, WI 53515), email (hip@scsl.lib.wi.us), and category (Limited Use - Juvenile (LJ)). On the right, a 'Check Out' screen is shown for Willy. In the 'Messages' section, there is a message from 'Abbie' dated 05/14/2013: "Hold Pickup Authorization for Abbie Frankenstein" [Delete].

1. When Abbie takes a hold from the Hold Shelf for Willy's and takes it to the checkout desk, staff must check for a Holds Pickup Authorization message on Abbie Frankenstein's Check Out page to verify she is authorized to check out Willy's holds.
2. At Check Out, staff will see this pop-up:



3. In the “Confirm Checkout” pop-up, your choices are:
 - **Requeue:** choosing this option sends this hold/reserve back into the title's Existing holds list. Use this option when the item in hand cannot fill the hold it came in for and you want to put the patron back on the top of the holds Queue. This comes up most often when you are checking a Damaged or Part Missing item out to an internal patron record for mending, etc. This pop-up will also appear when you are checking out an item that is missing from your hold shelf to your Missing Hold shelf card (Part M of this Section).
 - **Cancel Reserve:** use this option to completely cancel the hold for the patron who placed the hold. For example, if a patron has an item on the hold shelf at Library W and walks up to your circulation desk at Library M with another item from the same bibliographic record and wants to check this item out and have to go to Library W. Select the **Cancel Reserve** option to cancel the patron’s hold on the item on the hold shelf at Library W. That item will appear on that Library W’s Hold Shelf Action report the next day.
 - **Fill Reserve:** Use this option when the patron checking out the item has Hold Pickup Authorization for the other patron’s holds. The item will be checked out to the authorized patron and no hold canceled notice is generated.
4. In this case, Abbie does have permission so staff would click the “Fill Reserve” option in the pop-up message and click the “Yes, Check Out” button.

WARNING: this pop-up screen will also display when Patron has an item, from the same bibliographic record, waiting on the hold shelf at another library.

Please Confirm Checkout

The New Avengers '76 (DVD) is **on hold** and waiting
for this patron
(same title, **different item**: [39078048791603](#))

Checkout anyway?

<input checked="" type="radio"/> Requeue : Send reserve back to title's Existing Holds list
<input type="radio"/> Cancel Reserve
<input type="radio"/> Fill Reserve : current patron is authorized

Yes, Check Out (Y) No, Don't Check Out (N)

REQUIRED ACTION: Select **Cancel Reserve** so that the item on the hold shelf is cancelled and appears on that library's Hold Shelf Action report.

H. HOLD SHELF ACTION REPORT: RUNNING AND PROCESSING

WORKFLOW for clearing Expired and Cancelled holds from your Holds Shelf

The Holds Shelf Action (HAS) report lists the items on your hold shelf whose holds have expired/lapsed, or were canceled by a patron or by a staff person. Items remain on the hold shelf for 8 days. The eight days include Sundays and Repeatable holidays but not Unique holidays.

This report should be run and processed every open morning at every library. If you plan on printing this report you should open up a regular instance of Firefox to print this report to a laser or inkjet printer. Make certain you are not logged into the receipt printing or the spine label printing icons of Koha Firefox on your desktop. Here is a [link to the current printing options](#) for the Koha Holds reports.

- On the main Koha page, click the **Circulation** hyperlink.
- Under Circulation Reports, click the **Hold Shelf Action** hyperlink
- The report will default to your library and to “print” to a browser screen.
- Click the “**Submit**” button.

Report columns:

Remove: check box to remove hold from the report.

Title – Title of the item

Collection code/Call Number

Name – name of the patron whose hold has expired

Cancelled – if hold was canceled, date it was canceled.

Expired – if hold expired on hold shelf, date it expired.

Most libraries sort the items on their hold shelves by patron name so you may wish to sort the report on screen, by Name, before printing the report.

- Click on the carats in the Name column.
- Print the report by going to the top tool bar in your screen; click File, choose Print and click OK if your printer appears in the Name field. You may have to select a different printer name.
- Once you have retrieved all of the expired holds on this list, check the items in to fill the next hold, send them back to their owning library or be re-shelved at your library.
- Checking in the items does NOT remove the expired entries from the report. Go back to the report screen and ensure that the Check box in the “Remove” column is checked for those items you removed from the hold shelf.
- Then click the “Remove Selected from Holds Shelf” button. The report will refresh.
- If you don’t find a particular item on your hold shelf, follow the procedure for “Items(s) missing from your Hold Shelf” in Part M of this Section.

I. HOLDS QUEUE REPORT: RUNNING AND PROCESSING

The Holds Queue report is a list of hold requests that can be filled by items at your library. Hold requests move through the system following the [Hold Sequence](#). Make certain you are not logged into the receipt printing or the spine label printing icons of Koha Firefox on your desktop. **KNOWN PROBLEM:** if you have more than 200 items on your HQ report you may experience problems printing the report in Firefox. (SCLS Support Ticket 42040* (as 45954 works in Chrome)) **Work-around:** use Chrome as your browser to print the report. Here is a [link to the current printing options](#) for the Koha Holds Queue report.

- When a patron places a hold, the system first checks the **patron's pickup location** to see if an item is available at that location to fill the hold.
- If there is not, the hold request follows the [Hold Sequence](#), starting from the pickup location, to the next library in the sequence that has the item Available.
- If staff at a library cannot fill the hold with their item (can't find the item, item missing a part, item damaged, etc.), they will mark the item Trace from the report and Submit the changed status on the report.
- This action will send the hold request back into the Sequence to the next library that has an Available item.
- ***Each library in the LINKCAT must run their Holds Queue report at least once a day that they are open and fill as many holds as they can and/or set items to Trace that cannot be located. See the Holds Queue report workflow below for the procedure.***
- If a library does not run and fill the hold requests on their Holds Queue report, hold requests will get backed up and other holds in the system will not get filled. This is especially critical for Book Group holds or Multiple Copy holds. If you place 5 holds for

your Book Group and #3 hold remains unfilled on Library XYZ's Holds Queue report, #4 and #5 holds will not get filled until #3 is filled or the item at that library is set to Trace.

WORKFLOW: Holds Queue report

- Use this report to locate items on your shelves to fill holds for the requesting patrons.
- Checked-in items are removed from the HQ report immediately, new items are added when the report is refreshed at xx:50 of each hour
- Make sure that your Hold Shelf Action report has been run, the items processed and the report cleared before running and printing your Holds Queue report.
- **Run this report at least once daily**, each day that you are open.
 1. Click the Circulation hyperlink from any page.
 2. Under Circulation reports, click the Holds Queue hyperlink.
 3. Set your pre-sorts. On the Holds Queue report page, there are three pre-sorts that can be set. Choose the sort(s) based on how your library staff searches for items (collection code; location then call #; or location then collection code; etc.)
 4. Hide the Patron column on the report before printing. In the report, there is an [x] in certain column headers. Click on the [x] in the Patron column so that 1) the report fits on single pieces of paper and 2) you do not need to shred the report afterwards
 5. Print the report from a regular instance of Firefox. Use [these options](#) if you have problems printing the report from the Firefox toolbar.
 6. Search for the items.
 7. Circle or mark the hold alerts on the report to indicate that you could not find the item(s) to fill the hold. You will set these item statuses to Trace later in this workflow.
 8. When you have gathered all the items you can find, take them back to a work station and check them in using the Check In function either from the report or from the main Check in page.
 - a. If an item fills a hold for pickup at another location, you will see a Hold Found pop-up message for transfer.
 - i. Click the "Confirm hold and transfer" button.
 - ii. Put a Post-It note on the item with the destination library's [3-letter Delivery code/agency acronym](#) and put item in delivery.
 - b. If an item fills a hold for pickup at your library, you will see a Hold Found pop-up for your library.
 - i. Click the "Confirm hold" button OR
 - ii. Click the Print Slip and Confirm button.
 - iii. put the item on your hold shelf.
 - iv. The Holds Queue report is immediately updated and the hold alert will be removed from the report.
 - c. If you check in the item and it is not trapped for the hold alert on the report, that hold was filled by another checkin or you pulled the wrong item.

Setting items to Trace: You can repeat this whole process if you run more than one Holds Queue report in a day or you can leave hold alerts remaining on the report for the next day.

- If you cannot find an item listed on your report you should move the hold alert off of the report by setting the item to Trace and updating the report.
 - By setting the items to Trace status, you are indicating that you cannot find the item and you want to prevent the hold alert from appearing on your report again. When you set the item status to Trace, the system automatically passes the hold alerts to the next library that has the item as available. If you are the only library that owns this item the existing hold alert(s) will remain valid but patrons will not be able to place new holds on the bib record. **KNOWN BUG:** Problem changing several items to Trace status on Holds Queue report. Some libraries report that if they have a large number of holds request on their HQ report, or multiple people are updating the report at the same time, they are unable to mark several items to Trace at the same time. **Work-around:** Use Chrome as the browser when marking several items to Trace at once.
(4/17/2012) (SCLS Support Ticket 1547*)
 - Pass status: The **Pass option should be used only when your library has to close for a period of time or when you have an emergency closure and you want to move the hold alerts on to other libraries that can fill those holds.** For example, if your library is closing down for renovation or a move, you can request that SCLS staff Pass all the items off of your report for the period of your closure. Another situation where you might Pass particular items from your report is if there was flooding or a section of the roof leaked at your library – only a small part of your overall collection was affected so you might Pass all items with a particular collection code or shelving location. If you are the only library that owns this item the hold will remain on your report unless the status is changed to Trace or some other Lost status.

Withdrawn item on your Holds Queue report?

The system is designed to populate your library's Hold Queue report (pick list) only with items that, at the point of generating the report, have a Current Library equal to your library and have a status of Available.

If a hold is placed on a bib record that includes an item with a Withdrawn status, the library that owns the item with the Withdrawn status is ignored as the hold request "travels" through the Hold Sequence.

If an item with a Withdrawn status is the only item on a bib record, neither patrons nor staff are able to place a hold on the record. Staff are not able to place an item-level hold on items with a status of Withdrawn.

Marking an item Withdrawn after it appears on your pick list will not remove it from the Holds Queue report. If something appears on your Holds Queue report that needs to be

Withdrawn, you or your staff **must mark it Trace on the Holds Queue report** and “Submit” the change to the report in order to remove that hold request from the report. Only after the hold request is removed from your HQ report should you mark the item as Withdrawn.

If you do find a Withdrawn item on your Holds Queue report, go to the item record, remove the Withdrawn status, then go back to the report, mark the item Trace and submit the change to the report. Then go back to the item report and re-mark the item as Withdrawn. Please note that all items with a Withdrawn status are deleted once a month (near the end of the month). If the Withdrawn item is the last item on the bib record, then the bib record, and any attached holds, is deleted as well.

J. BOOK GROUP HOLDS/MULTIPLE COPY REQUESTS

Book Group holds can be a combination of single holds placed on individual patron records and multiple holds placed on one Library Patron record so that staff can provide spare copies for walk-in attendees.

Multiple copy holds are generally holds placed on one patron record, usually at the request of a local teacher or daycare, or for a storytime at a library.

For both situations:

- Libraries should allow the holds to be filled by the Holds Queue Report process if possible.
- Libraries must follow the “[Library Staff Use of Other Library Materials](#)” policy when placing book group or Multiple Copy Holds.

Placing multiple holds on the same bib(liographic) record:

1. When using one patron account:
 - a. Search the Catalog for your title
 - b. Click on the item’s hyperlink to get to the “Normal” screen for the items.

Murder at the book group /
by King, Maggie.

Type: Book
Publication: New York, NY: Gallery Books, 2014.
Edition: First Gallery Books trade paperback edition.
Description: pages cm.
ISBN: 9781476762463, 1476762465.
Related Subjects: Book clubs (Discussion groups) Fiction | Murder Investigation Fiction | Detective and mystery stories

Item type	Location	Home Library	Current Library	Collection	Call Number	Status	Last Seen	Barcode	Spine Label
Book, adult, 14 day loan	NEW ADULT	HAW	Madison PL-Hawthorne	BOOKS AD FIC MYSTERY	King	Available	08/14/2015	39078086772762	Print Label
Book, adult, 14 day loan	NEW ADULT, 1ST FLOOR	MAD	Madison PL-Central	BOOKS AD FIC MYSTERY	King	Available	05/21/2015	39078086772804	Print Label
Book, adult, 28 day loan	ADULT	MCM	Wis. Rapids - McMillan Library	PAPERBACKS AD FIC MYSTERY	K	Available	03/30/2015	39369004426395	Print Label
Book, adult, 28 day loan	ADULT	REE	Reedsburg Library	PAPERBACKS AD FIC MYSTERY	M-pa King	Available	08/18/2015	39078088779625	Print Label
Book, adult, 28 day loan	NEW ADULT	SKC	Sauk City Library	BOOKS AD FIC MYSTERY	M KING	Available	03/10/2016	39078088831764	Print Label
Book, juvenile, 28 day loan	ADULT, 2ND FLOOR	STO	Stoughton Library	PAPERBACKS AD FIC MYSTERY	FIC KING	Unavailable	07/14/2015	39078085396860	Print Label
Book, adult, 28 day loan	1ST FLOOR	STP	CPL-Stevens Point branch	PAPERBACKS AD FIC	PB Mystery Kin	Available	03/10/2016	36657005306977	Print Label

- c. Click the “Place hold” button in the work toolbar OR the “Place new hold” tab on the left side of the screen
- d. In the “Place new hold” screen, enter the card number or name for your Book Group’s patron record.

okoha

Enter patron card number or partial name:

[Home](#) > [Catalog](#) > [Murder at the book group /](#) Place a hold on Murder at the book group /

Place a hold on [Murder at the book group /](#)

Hold details

Patron:	MONONA BOOK GROUP (29078011465377)
Priority:	1
Notes:	<input type="text"/>
Pickup at:	Monona Library
Place a hold on the next available copy	<input checked="" type="checkbox"/>

Place a hold on a specific copy

Hold	Item type	Barcode	Home Library	Call no.	Volume	Information
<input type="radio"/>	Book, adult, 28 day loan	39369004426395	Wis. Rapids - McMillan Library	K		Not on hold
<input type="radio"/>	Book, adult, 14 day loan	39078086772804	Madison PL-Central	King		Not on hold
<input type="radio"/>	Book, adult, 14 day loan	39078086772762	Madison PL-Hawthorne	King		Not on hold
<input type="radio"/>	Book, adult, 28 day loan	39078086779625	Reedsburg Library	M-pa King		Not on hold
<input type="radio"/>	Book, adult, 28 day loan	39078088831764	Sauk City Library	M KING		Not on hold
<input type="radio"/>	Book, adult, 28 day loan	36657005306977	PCPL-Stevens Point branch	PB Mystery Kin		Not on hold
<input checked="" type="radio"/>	Book, juvenile, 28 day loan	39078085396860	Stoughton Library	FIC KING		Not for loan (Unavailable) Not on hold

- a. The hold will default to “Place a hold on the next available copy”. Do NOT uncheck this button. **DO NOT PLACE ITEM-LEVEL (copy specific) HOLDS.**
- b. Click either Place Hold button.
- c. You will be taken to the Edit Holds screen.

[Home](#) > [Catalog](#) > [Murder at the book group /](#) Edit holds

Edit holds on [Murder at the book group /](#)

Priority	Patron	Notes	Date	Pickup Library	Details	Suspended	Waiting/ Resume
1	MONONA BOOK GROUP 29078011465377		03/10/2016	Monona Library	<input type="checkbox"/>	<input checked="" type="checkbox"/>	resume on (optional) 08/15/2016

Showing 1 to 1 of 1 row | Page 1 of 1

- d. Enter a “Resume On” date for one month prior to your Group’s estimated check-out date. The holds will be automatically activated on that date.
- e. Click the “Update Holds” button to set the activation date.
- f. Click the “Place new Hold” tab in the left screen and repeat steps c-f for additional holds.
- g. Click OK if and when dialog boxes appear.

Enter patron card number or partial name: Submit

Check Out Check In Search the Catalog

Home > Catalog > Murder at the book group / Edit holds

Edit holds on Murder at the book group /								Sort by Priority ▾ ASC
Priority	Patron	Notes	Date	Pickup Library	Details	Suspended	Waiting/Resume	
1	MONONA BOOK GROUP 29078011465377		03/10/2016	Monona Library	Next available	<input checked="" type="checkbox"/>	resume on (optional) 08/15/2016	
2	MONONA BOOK GROUP 29078011465377		03/10/2016	Monona Library	Next available	<input type="checkbox"/>	resume on (optional)	

Showing 1 to 2 of 2 rows | Page 1 of 1

- h. When you have completed placing your holds, click on the hyperlink for the patron record and go to their Check Out screen.
- i. Add a Message stating the title of the book and the date to be discussed.

Enter patron card number or partial name: Submit

Check Out Check In Search the Catalog

Home > Circulation > Checkouts > MONONA BOOK GROUP

MONONA BOOK GROUP (29078011465377)
MONONA PUBLIC LIBRARY
1000 NICHOLS RD
MONONA WI 53176
608-222-6127
No email stored
Category: Internal (INT)
Home Library: Monona Library

[Check Out](#)

[Details](#)

[Edit](#) [Change Password](#) [Print](#) More ▾

Clear Screen **Checking out to MONONA BOOK GROUP (29078011465377)** Search To Hold
Attention:
Messages:
03/10/2016 MOO "Discussing Murder at the book group on 9/15/2016."
[\[Delete\]](#)
[Add a new message](#)

Enter item barcode: Check Out
Specify Due Date: Remember for Session: Clear

When placing holds for Book Groups:

1. Place holds on individual patron records when you have repeat attendees.
2. Do not send an email (unless at point 5(b)). Staff in charge of book groups should monitor the holds on the bib record to ensure that holds are being filled daily. Please make sure that you have placed and activated your holds in enough time to be filled by libraries running their Holds Queue reports.
 - a. **Rule of thumb:** Allow one day per number of holds you have placed. 14 books = 14 days; 26 book = 26 days. You may also want to add a couple more days as most libraries are closed on Sundays.
3. Enter a “Resume On” date for one month prior to your *Group’s estimated check-out date*. For example, if your group is discussing a book at their September meeting, they will want to check the book out in August. Set the “Resume On” date for July in order to receive all the items before the August meeting. Setting a “Resume On” date will help other Book Groups schedule their own books.
4. If adding message to the Check Out screen of this patron record, indicate title and Book Discussion date. This is useful information for both your library’s staff and other Book Groups throughout the system.

5. If it seems like your holds are not getting filled, the process may have stalled at a library OR your holds are being filled but at a slow rate. Not every library is open every day and most libraries run their reports in the morning so a hold alert may sit on a report for 24-28 hours before being filled.
 - a. Check the holds list to see if items have been trapped recently.
 - b. Are holds being filled for other patrons?
 - c. Check your holds list to see which library filled the last hold, and contact the library that comes next in the Hold Sequence (LINK Circ Contacts list). Ask them to pull the item from their shelf and check it in or mark the item Trace on their Holds Queue report.
 - d. You CAN contact the libraries that have Available items and ask them to search their shelves and check in their items for you BUT follow the steps listed for the Multiple Copy request that is URGENT. Only send the emails to the number of libraries that have the items Available. Do NOT send out an email to all 15 libraries that have the item available when you only need 5 items.

Holds for a Multiple copy request:

1. Follow the same steps for Book Group holds.

Holds for a Multiple Copy request that is **urgent**:

1. Place holds on the requesting individual's patron record.
2. **DO NOT PLACE ITEM-LEVEL (copy specific) HOLDS.**
3. Send an email ONLY to the libraries that own the items with the subject line "Multiple Copy request".
 - a. In the body of the email, copy and paste the URL to the bib record. Libraries will be able to click on the link to confirm that they 1) own the item and 2) it is Available.
 - b. To copy the url:
 - i. Go to the Normal screen of the items record.
 - ii. Click your mouse in the URL field of the record. The entire "address" should become highlighted in blue.
 - iii. Right-click on your mouse and select "Copy".
 - iv. Go back to your email, right-click your mouse again and "paste" the URL into the email. Here's an example:

"A <Library> patron needs multiple copies of Tuck Everlasting:

<http://scls-staff.kohalibrary.com/cgi-bin/koha/catalogue/detail.pl?biblionumber=237006>

and The Boy in the Striped Pajamas:

<http://scls-staff.kohalibrary.com/cgi-bin/koha/catalogue/detail.pl?biblionumber=349770>

Thanks for checking your shelves."

K. HOLD NOTIFICATION

See [Section XIII Messaging Preferences, Messaging Queue and Notices.](#)

L. OTHER CIRCULATION/HOLD REPORTS

Holds Awaiting Pickup

This is an optional report that you can use to “shelf read” and confirm the items on your hold shelf or find out if some items are missing. The report ONLY sorts by the library listed in the Action column. If you run this report, remember to shred it afterwards because it contains patron information.

The screenshot shows the Koha circulation interface. At the top, there is a search bar with placeholder text "Enter patron card number or partial name:" and a "Submit" button. Below the search bar are links for "Check Out", "Check In", and "Search the Catalog". A breadcrumb navigation path "Home > Circulation > Holds awaiting pickup" is visible. The main content area displays a table titled "Holds awaiting pickup for your library on: 03/20/2013". The table has columns: Available since, Title, Patron, Location, and Action. One row is shown, representing a hold for a patron named DYNIX_DANGER_I, with details: Date: 03/20/2013, Title: Guide to the national parks of Canada, (Book, adult, 14 day loan), Barcode: 39078075787094, Patron: CEN 917.1047 G941g 2011, Location: 608-233-3373 hio@scls.lib.wi.us, and Action: "Cancel hold and return to : CEN".

Report columns:

- Available since: date items was checked in at your library and placed on the hold shelf.
- Title: Title, item type and item barcode
- Patron: patron Name, phone number and email address
- Location: Owning library and call number
- Action: DO NOT USE. The buttons in this column allow you to cancel holds but cancelling from this report does not trap the item for subsequent holds.

Transfers to Receive

This report shows all of the items from other libraries/branches that are in transit to your library/branch. The status of these items is marked as "In Transit" in the Normal screen of the bibliographic record. This report can be useful when used in conjunction with the Long in Transit report.

Report columns:

- Coming From – Library item(s) in transit from [library] to your library
- Fields on report :
- Date of Transfer: date item was checked in at the "Transit From" location
- Title: Title
- Reserved by: if a name is in this column, the item is in transit to fill a hold for this patron; if this column is blank, the item is returning to your library.
- Location – Call number or owning library codes

M. ITEMS MISSING FROM YOUR HOLD SHELF

Procedure for checking items out to your library's Hold Shelf card.

Item has been checked in at your library and placed on the hold shelf for a patron.

If the patron and staff members are unable to locate the item when the patron is trying to

check the item out OR when you run your daily RHSA and the item that lapsed on the hold shelf is not on the hold shelf, follow these steps:

- Check the item out to your library's Hold Shelf card.
- Re-queue the patron's hold as necessary.
- If the item is found, it will be checked in eventually, either to fill a hold or when it is received at the owning library. If this is the case, the process of checking the item in will remove the item from your library's Hold Shelf card.
- If the item is not found and the item Lost Status converts to Lost, your library becomes a "patron" with a lost item on its account. You will need to reimburse the owning library for the lost item, within 6 months of the date the item converted to Lost.
 - Some libraries change the due date to 5 months from the date of checking the item out to their Hold Shelf. If your library does this, be prepared to pay the owning library for the lost item within one (1) month of the items converting to lost, in order to reimburse the owning library within the 6 month period.

N. WRONG HOLD SHELF.

Sometimes patrons choose the wrong pickup location or have decided that they want to pick up a hold at a different library. This procedure will allow you to change the pickup location of an item on your hold shelf (or in transit to your library) and send it in delivery to the new location.

1. Pull the item from the hold shelf.
2. Access the patron's record.
 - In the patron's Check Out screen, you can click the item barcode hyperlink in the Holds Waiting message OR
 - In the patron's Details screen, you can click the item barcode hyperlink in their "On Hold" list.
3. In the Item Detail screen, click the Edit Holds button on the left side of the screen

The screenshot shows the Okoha circulation system interface. At the top, there are navigation links: Circulation, Patrons, Search, More, SCLS Headquarters (Set), admin (Log Out), and a help link. Below the navigation is a search bar with placeholder text 'Enter patron card number or partial name:' and a 'Submit' button. Underneath the search bar are three buttons: 'Check Out', 'Check In', and 'Search the Catalog'. The main content area displays the 'Edit holds on Serenity (DVD)' screen. On the left, there is a sidebar with categories: Normal, MARC, ISBD, Items, and 'Edit holds' (which is currently selected). Below the sidebar is a 'Place new hold' button. The main table lists holds with columns: Priority, Patron, Notes, Date, Pickup Library, Details, Suspended, and Waiting/Resume. There are three rows in the table:

Priority	Patron	Notes	Date	Pickup Library	Details	Suspended	Waiting/Resume
2	WHITE, BETTY 29078007456034		06/07/2012	Wis. Rapids - McMillan Library	Next available	<input type="checkbox"/>	resume on (optional) <input type="text"/>
1	VORPATRIL, IVAN 29078017854129		06/07/2012	Mazomanie Library	Next available	<input type="checkbox"/>	resume on (optional) <input type="text"/>
Waiting	REYNOLDS, MALCOLM 29078013982007		06/07/2012	Item waiting at SCLS Headquarters	Selected item 39078062344818		Waiting since 06/07/2012

4. Go to the top of the holds list, the patron's hold will be listed with a Priority of "Waiting"
5. Click the arrow on the pull-down menu and change the Priority to 1,

6. You will get a pop-up message stating “This item is currently on the holds shelf. Are you sure you want to requeue this hold?”



7. Click OK, then click the Update Holds button.
8. Now the Pickup Library field will become available for the patron’s hold. Change the pickup library to the correct/requested location and then click the Update Holds button again.
9. If there are no other/active holds** at your library, check in the item to send to the new pickup location.

Not checked out.

Hold Found: [Serenity \(DVD\)](#)

Hold for:

- [REYNOLDS, MALCOLM](#) (29078013982007)
- TEST PATRON
- 14 SERENITY
- MADISON, WI 53718
- 608-242-4711
- hjo@scls.lib.wi.us

Transfer to: Monroe PL-Green County (MRO)

Confirm hold and Transfer

 Print Slip, Transfer and Confirm  Ignore, Keep here

The system will re-trap the hold for the patron and send it to the new/correct pickup location.
**If there are other /active holds with your library as a pickup location, and they have an earlier Hold Placed date than this hold, checking in the item will trap the item for a different hold. In this situation,

- Do not check in the item at your library.
- Put a note on the front of the item telling the destination library to check the item in when they receive it.
- Put the item in an Inter-D envelope and send it to the destination library.
- When the destination library receives the item, they will check it in and the item will be trapped for the patron, at the corrected pickup location.

O. REDUCED TRANSPORTATION HOLDS

The purpose of Reduced Transportation Holds [RTH] is to reduce the need to shuttle items around by filling holds whose pick-up locations are at the check-in location in preference to those farther away. It is a compromise solution that sacrifices a degree of fairness by deviating from the strict numerical priorities of the holds queue.

If an item with one or more holds is checked in, the system will check to see if there is any hold on the item whose pick-up location is the same as the check-in location.

If there is no active hold at the check-in location, the first Active hold at the top of the queue will be filled.

If there is an active hold at the check-in location, the system next looks to see if that hold was placed within 60 days of the first Active hold at the top of the hold queue.

If the hold at the check-in location was placed within 60 days of the first Active hold at the top of the queue, then it will stay in library to fill the first active hold at that check-in location.

If that hold was not placed within 60 days of the top Active hold, then the item will go to fill the first Active hold at the top of the queue, regardless of its pick-up location.

SUSPENDED HOLDS

RTH will ignore Suspended holds. Once a hold is made active, it will be subject to the parameters listed above. When Suspended holds are re-activated, they will be re-activated in the Holds Queue according to the Hold Placed date.

ITEM-LEVEL HOLDS

RTH has the same effect on item-level holds as it does on “any copy” holds, an item checked in at a location will stay at that location to fill holds with that pickup location, unless your item-level hold is for a different barcode than the item that came in to fill other holds.

RTH parameters are posted on the [Circulation Policies](#) web page.

P. CHANGING THE PICKUP LOCATION OF AN UNFILLED HOLD

If a patron wants to change the pickup location of an unfilled hold, staff will have to do it for them. Currently, the only place to change the pickup location for an unfilled hold is in the list of holds on the bibliographic record. Please follow these steps:

- Access the patron record.
- The patron's list of holds is available from their Details screen.

Checked Out		Fines & Charges		On Hold (1)		Revision History			
Branch	Placed	Expires	Title	Note	Call Number	Barcode	Rank	Cancel?	Suspend? (all: <input type="checkbox"/>)
SCLS Headquarters	2012-05-31 15:55:44	05/31/2013	Dr. Horrible's sing-along blog (DVD)				1	<input type="checkbox"/> No	<input checked="" type="checkbox"/> Resume on (optional): <input type="text"/>

[Update Holds](#)

- Click on the title hyperlink to go to the Edit Holds screen for that bibliographic record.
- Go to the pull-down menu in the Pickup Library column and select the new pickup location.

Okoha

Enter patron card number or partial name: Submit

Check Out | Check In | Search the Catalog

Home > Catalog > Dr. Horrible's sing-along blog (DVD) > Edit holds

Normal
MARC
ISBD
Items
Edit holds
Place new hold
Checkout history

Edit holds on Dr. Horrible's sing-along blog (DVD)

Priority	Patron	Notes	Date	Pickup Library	Details	Suspended	Waiting/Resume
1	REYNOLDS, MALCOLM 29078013982007		05/31/2012	SCLS Headquarters Marshall Library Mazomanie Library McFarland - E.D. Locke Library Middleton Library Monona Library Monroe PL-Green County Mount Horeb Library New Glarus Library North Freedom Library Oregon Library Pardewille Library Plain-Kraemer Library Portage Library Peynette Library Prarie du Sac Library Reedsburg Library Rock Springs Library Sauk City Library SCLS Electronic Library SCLS Headquarters		<input type="checkbox"/> Next available	<input checked="" type="checkbox"/> resume on (optional): <input type="text"/>

Showing 1 to 1 of 1 row | Page 1 of 1

- Click the Update Holds button at the bottom of the screen.

Okoha

Enter patron card number or partial name: Submit

Check Out | Check In | Search the Catalog

Home > Catalog > Dr. Horrible's sing-along blog (DVD) > Edit holds

Normal
MARC
ISBD
Items
Edit holds
Place new hold
Checkout history

Edit holds on Dr. Horrible's sing-along blog (DVD)

Priority	Patron	Notes	Date	Pickup Library	Details	Suspended	Waiting/Resume
1	REYNOLDS, MALCOLM 29078013982007		05/31/2012	Middleton Library		<input checked="" type="checkbox"/> Next available	<input type="checkbox"/> resume on (optional): <input type="text"/>

Showing 1 to 1 of 1 row | Page 1 of 1

- Repeat these steps for each of the patron's holds. See **Part M** to change the pickup location of a filled hold/item at the wrong pickup location.

Q. EXTENDING THE HOLD SHELF EXPIRATION DATE

Extending the expiration date for items on your hold shelf can be based on the need of one individual or based on a library-wide need. On the individual level, you may be asked to extend the expiration date for a patron who was unable to get to the library in a timely way or is having issues receiving their hold notification (phone problems, email problems, etc.). Or, if your library was closed due to a weather or emergency situation, you may want to extend the days those items are on the hold shelf to make up for those closed days. In either event, the procedure is the same:

1. Before the hold expires, pull the item(s) from your hold shelf and check the item(s) in again.
2. This will cause the hold shelf expiration date to extend for 8 days from the new check-in date.