

## Workflow for creating Local Hold/Use item records April 2023

Local Holds/Use parameters are applied to NEW materials based on the preference of the owning library. No library is required to apply Local Hold/Use parameters to their materials.

Parameters of Local Holds/Use for NEW materials purchased by a participating library:

Libraries **should not apply Local Hold/Use parameters to On Order** item records. Only apply the LHU parameters after the item is in hand and being processed. **New items should not be assigned the Local Hold parameters until the items have been received in hand by the library.** This means that item records with an On Order status should not have the BKALH14 Item Type, unless the new items have been received by the library.

### **Steps for creating items with Local Hold/Use parameters**

NEW materials eligible for application of the Local Hold/Use parameters (as of March 2023)

1. Regular print adult books

Use the searching/matching and linking instructions in the Linking Manual, [Section V Books](#) to add an item to an existing Bibliographic record or follow the steps to create a BSE for the title (Part 6).

When you find the correct/matching BIB record, link your item to the record (Linking Manual, [Section XII Linking items](#)) using the parameters below.

LOCAL HOLD ITEM RECORD

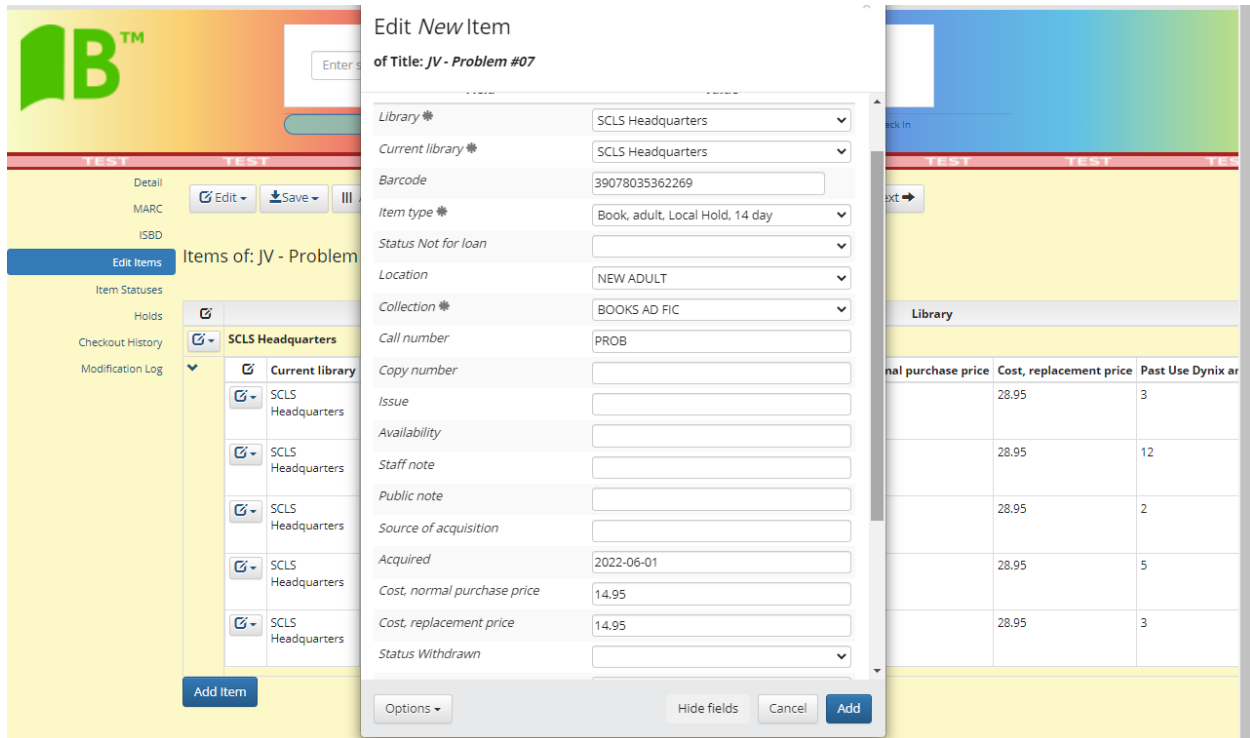
Item Type = BKALH14

Shelving Location = library preference

Collection code =

- BKAFI or any other BKAFI collection code
- BKANF or any other BKANF collection code

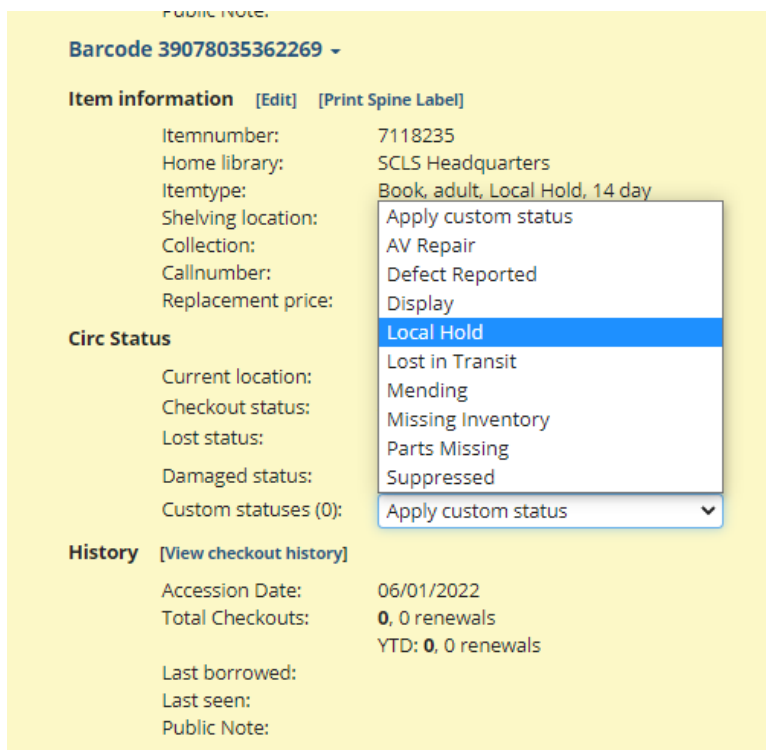
STAFF NOTE = "YYYY MM NEW" – **Optional**. Only needed if running the On Demand report.



Add the item.

Then click on the Item Statuses link in the left menu bar.

In this screen, change the Custom Status field for this item to “Local Hold”



PUBLIC NOTE.

**Barcode 39078035362269** ▾

**Item information** [Edit] [Print Spine Label]

Itemnumber: 7118235  
 Home library: SCLS Headquarters  
 Itemtype: Book, adult, Local Hold, 14 day  
 Shelving location: NEW ADULT  
 Collection: BOOKS AD FIC  
 Callnumber: PROB  
 Replacement price: 14.95

**Circ Status**

Current location: SCLS Headquarters  
 Checkout status: Available  
 Lost status: ▾  
 Damaged status: ▾  
 Custom statuses (1): Local Hold (06/01/2022) ✕  
 Apply custom status ▾

**History** [View checkout history]

Accession Date: 06/01/2022  
 Total Checkouts: 0, 0 renewals  
 YTD: 0, 0 renewals

Last borrowed:  
 Last seen:  
 Public Note:

This item will have a status of Available AND a status of Local Hold. This will be part of the information to share with patrons – that if they see this combination of statuses in the catalog, this item is in-library and available for a walk-in checkout or to fill a local hold.

JV - Problem #07  
Book

**JV - Problem #07**  
 Format: Book  
 Copies: 5 of 5 copies available  
 ▾ Place hold (None pending) 🛒 Add to Cart

Search Results Navigator

**Title Actions**

▾ Place hold  
 🖨 Print  
 📄 View Record As ▾

Holdings (5) Reviews and more

📊 View nearby items on shelf ▾

Library ▾	Location	Collection	Call number	Availability
SCLS Headquarters	Professional Collection-Staff Only	Non-Fiction	Workshop	Available
SCLS Headquarters	Professional Collection-Staff Only	Non-Fiction	Workshop	Available
SCLS Headquarters	Professional Collection-Staff Only	Non-Fiction	Workshop	Available
SCLS Headquarters	Professional Collection-Staff Only	Non-Fiction	Workshop	Lost
SCLS Headquarters	Professional Collection-Staff Only	Non-Fiction	Workshop	Available
SCLS Headquarters	New Adult	Fiction	PROB	Available Local Hold

Finish processing the item with any labels to indicate New item or Local Hold item.

The Custom Item Status “Local Hold” will not be removed by Check Out or Check In.

## DUMMY ITEM RECORD

If the library has to create a BSE for their Local Hold item that is the first item in the system, the library should add a dummy item record with a regular item type in order to allow all patrons to place holds on the title. SCLS staff will remove dummy items that are no longer needed.

To add a dummy item to a record, follow these steps after creating the Local Hold item record.

1. On the **Edit Items** page, click the **button** next to the Local Hold item record as if to edit it.
2. Click on **Clone Item**.
3. An **Edit New Item** popup will come up.
4. Change these fields to make it a dummy item (other fields can be left alone or blank)
  - a. **Item Type:** Book, adult, 14 day
  - b. **Status Not for loan:** On Order Non-ACQ
  - c. **Staff Note:** LOCAL HOLD DUMMY ITEM

### Steps for removing Local Hold/Use item parameters

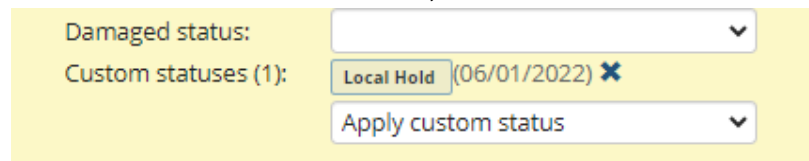
The On Demand report, “Local Holds/Use Items”, contains a new column labeled “Status Set”. This is the date that the Custom Item Status was set to “Local Hold”.

Time frame: Local Hold/Use parameters can be applied to materials for up to 60 days. Libraries will edit materials by changing the Item type to a “regular” Item type for the material and remove the “Local Hold” Custom Item status.

**AFTER 60 DAYS**, you will need to edit the item parameters to change the item to regular parameters.

### Individual items

- Access the item record.
- Edit the item to change the Item Type to BKA14 or BKA28.
- If you added a Staff Note remove it
- Save the change.
- In the Item Statuses screen, click “X” at the end of the Local Hold status to remove it.



Damaged status:

Custom statuses (1): Local Hold (06/01/2022) X

- Check in the item. It may be trapped to fill another hold at your library, a hold at another library or will remain at your library to be shelved.

### Multiple items using Batch Item Edit

- Run the On Demand report Local Hold/Use items
  - Enter your library code – ‘LIB’
  - Enter the Staff note for the Month you are changing; e.g. ‘2022 JULY NEW’ (or enter ‘%’ to see all items)
- OR pull the materials from the shelf and scan the item barcodes into the Batch Item Editor.
- Add the item numbers to the Batch Item Editor (Linking Manual, [Section XIV Editing, Moving and Deleting items](#), Part E Batch Edit of items)
  - Change the Item Type
    - **Field:** Item type

- **Action:** Set To
    - **Value:** Book, adult, 14 day loan (BKA14) or Book, adult, 28 day loan (BKA28)
  - Remove the Custom Item Status
    - **Field:** Custom Item Status
    - **Action:** Remove Status
    - **Value:** Local Hold
  - Remove the Staff Note (if used)
    - **Field:** Staff note
    - **Action:** Set NULL
    - **Value:** n/a
- Check in the items. Items may be trapped to fill another hold at your library, a hold at another library or will remain at your library to be shelved.