

Holds

Overview

When a user requests an item that is already checked out, or when a library needs an item for binding, mending, or reclassification you can place a hold. When you place a hold, Symphony creates a Hold record that links the item and the user.

Hold records contain the following information about the item:

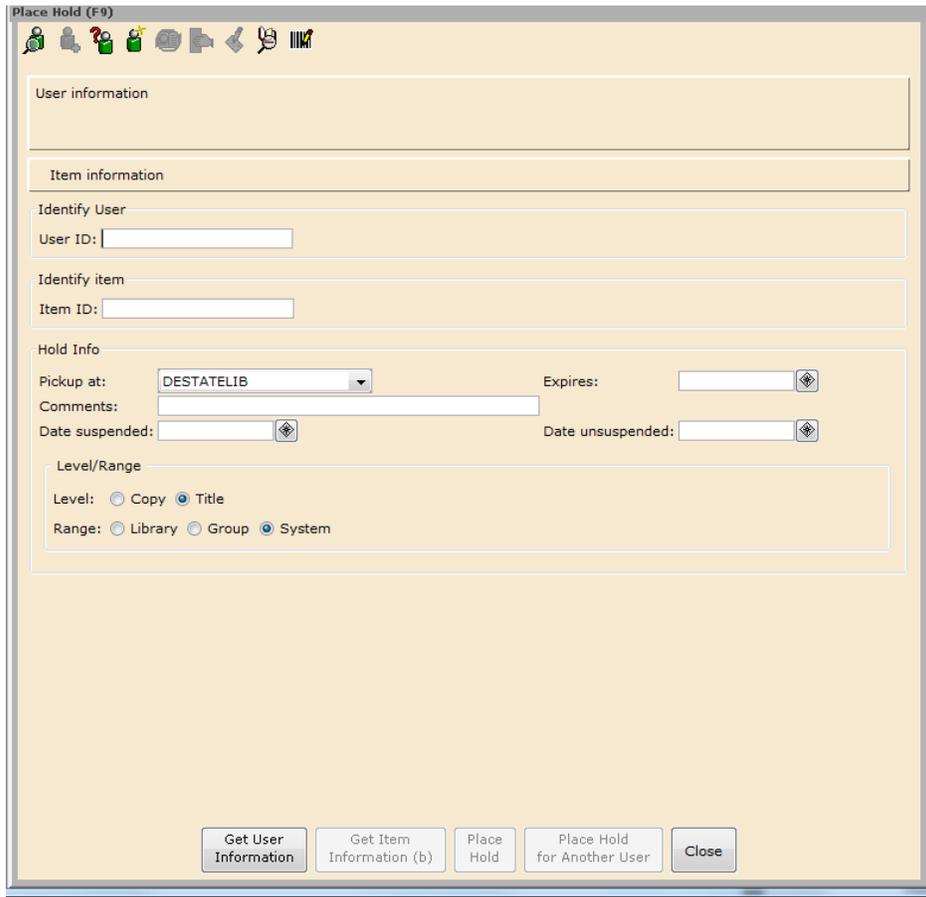
- User who placed the hold
- Library where the hold was placed
- Pickup library
- Date and time the hold was placed
- Hold level and range

When more than one user places a hold on an item, Symphony creates a hold list (queue). Any number of users can wait in the hold queue. Symphony uses the information in Hold records, Hold policies, Item policies, and User Profile policies to determine which user in the hold queue receives the item when it becomes available. **Patrons will not see where the hold is in the queue and no number will be given for patron's "place in line."**

Place Hold Wizard

To place a hold on an item

1. On the Holds toolbar, click the **Place Hold** wizard . The following window appears:



2. Scan the barcode from the user's card, or type the **User ID** and tap the **Enter** key or click **Get User Information**. You may also use the **User Search Helper** to identify the patron.

3. If you don't have the item ID, click the **Item Search Helper**, and search for the item. Once you locate the item, click **Place Hold**, and the item ID now appears in the **Item ID** box on the Place Hold window.

4. In the **Pickup at** box, select the location where you want the item held. If you leave this blank, the default is the library of the login that places the hold.

5. A default date of 1 year in the future will appear in the **Expires** box. If the patron will not need the item after a certain date, click the gadget to select that date.

6. In the **Comments** box, you may type information that is important about the hold. This is an optional entry. This comment displays in the item record, user record, alert messages, and in certain reports.

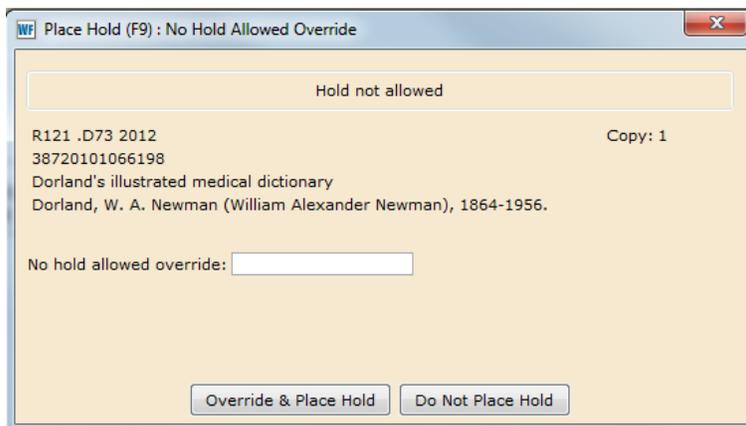
7. If the patron is going on vacation or wants to be temporarily “removed” from the hold queue, type the effective date in the **Date suspended** box. In the **Date unsuspended** box, type the date the patron wants to be “restored” in the list queue. During the suspension period, the patron will not lose his place in the queue. These are optional entries.

8. Select a **Level** and a **Range** using the option buttons. **These options should only be changed if a specific copy of an item is needed (such as for mending) or you want only those items from a particular library.**

9. Click **Place Hold**. The following window should appear:



NOTE: If a Hold Block window pops up **STOP!** There is a reason that the system is alerting you (it could be an un-holdable item type or in an un-holdable location code.) *Do not override the block!* Click **Do Not Place Hold** and investigate.



Display User Holds Wizard

Use the **Display User Holds** wizard to see a patron's active holds. This wizard displays the same Holds tab that appears when displaying patron records with **Display User** wizard.

To display a patron's hold list

1. On the Holds toolbar, click the **Display User Holds** wizard . The Display User Holds window appears.
2. Scan the barcode from the user's card, or type the **User ID** and tap the **Enter** key or click **Get User Information**. If the user has holds available for pickup, the following window appears:



3. Click **OK** to display the User Holds window:

Display User Holds

Alerts

Name: COLOSE, KATIE
 Id: 23313000059469
 Group ID: COLOSE
 Profile name: JUVENILE...

Identify user

User ID:

Email: colose@verizon.net
 Home phone: 302-475-2221
 Street: 1906 HARWYN ROAD
 CITYSTZIP: WILMINGTON, DE 19810

Holds

Total holds: 3

Title	Item ID	Level	Status	Placed	Pickup at	Pickup by	Expires	Suspen...	Unsus...
Space dogs...	33004001...	TITLE	(unavail...	7/27/2012	DESTATE...		7/27/2013		
Karate dog ...	33910043...	TITLE	(unavail...	7/27/2012	DESTATE...		7/27/2013		
Gone with t...	33807020...	TITLE	(unavail...	1/25/2013	DESTATE...		1/25/2014		

Display options

Pickup library Placed at library Owning library

Library: Type of hold:

Display This User's Holds Display Another User's Holds Close

NOTE You can sort items in the List of Holds in ascending or descending order. To do this, simply click the column heading of the column you want to sort.

4. On this window, you can review information about each hold. Click the glossary links in the Status column for more information about the item and hold:

Display User Holds : Glossary

Title: Karate dog [videorecording] : Chill
 Author: Screen Media Films (Firm)
 Call number: FILM K
 Copy: 1

Placed at library: DESTATELIB.
 Pickup library: DESTATELIB.
 Position: 3
 Hold placed: 7/27/2012 Expires: 7/27/2013
 No hold allowed override: N
 Level: TITLE NO recall
 Range: SYSTEM
 Status: (unavailable) Notified:
 Comment:

Close

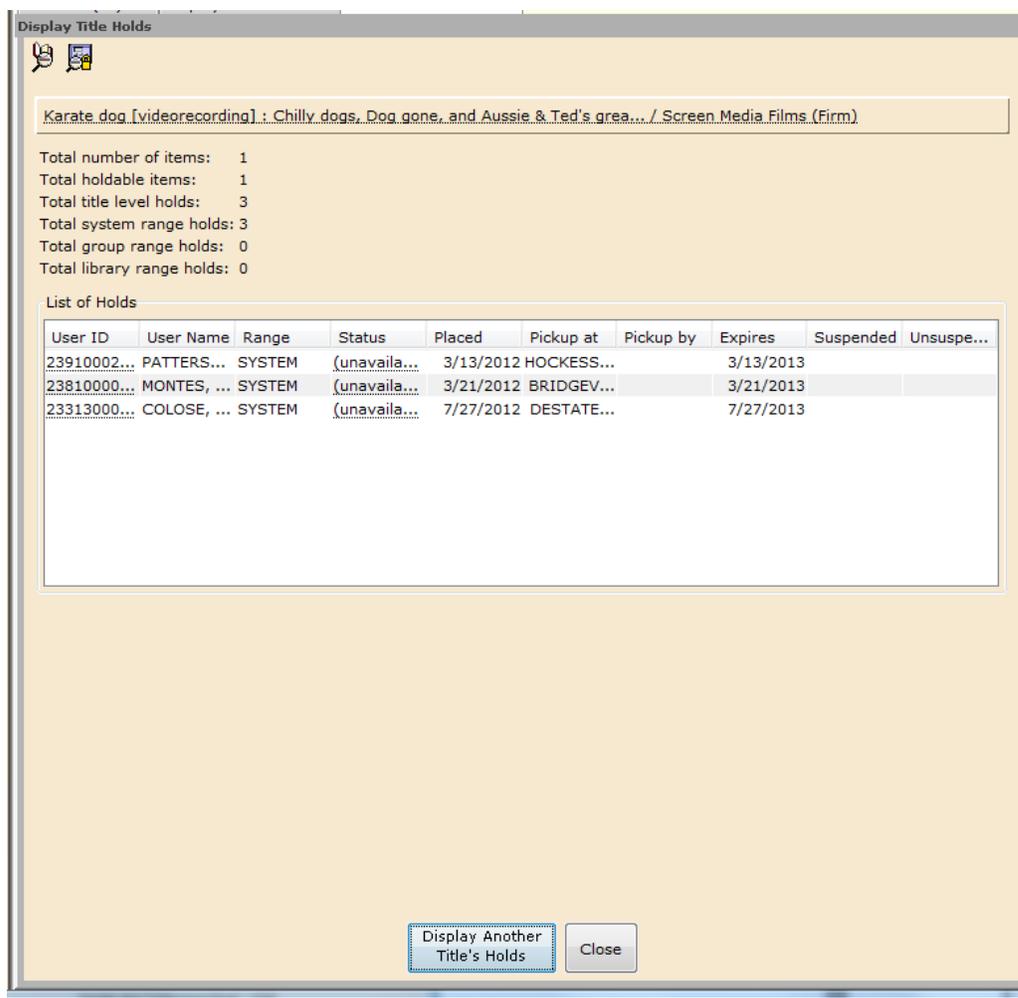
Very Important:
 The Position number is **NOT** an accurate reflection of where a patron is in the Holds Queue due to the fact that we use scoping. To avoid confusion and disappointment for the patron **DO NOT** give them this number.

Display Title Holds Wizard

The **Display Title Holds** wizard summarizes the items and title level holds for a specific title.

To display a holds queue for a single title

1. On the Holds toolbar, click the **Display Title Holds** wizard . The Item Search window appears.
2. Search for the title and click **OK**. The following window appears:



3. You can see the total number of items in the catalog, how many are holdable and how many holds there are. An item may not be holdable if it is in an item type that cannot be placed on hold (Reference, Walk-In) or if it is in a location that prohibits holds (Repair, Damaged).

NOTE See number 3 and Note on next page for additional functionality.

Display Item Holds Wizard

Use the **Display Item Holds** wizard to view a holds queue for a specific item. This wizard displays the same Holds tab that appears when displaying item records with the **Item Search** wizard.

To display a holds queue on a specific item



1. On the Holds toolbar, click the **Display Item Holds** wizard icon. The Display Item Holds window appears.

2. Scan the barcode on the item, or type the **Item ID** and tap the **Enter** key or click **Get Item Information**. The following window appears:

Identify item

Item ID: 33910043374124

List of Holds

Holds: 3

User ID	User Name	Level	Status	Placed	Pickup at	Pickup by	Expires	Suspended	Unsuspe...
23910002...	PATTERS...	TITLE	(unavaila...	3/13/2012	HOCKESS...		3/13/2013		
23810000...	MONTES, ...	TITLE	(unavaila...	3/21/2012	BRIDGEV...		3/21/2013		
23313000...	COLOSE, ...	TITLE	(unavaila...	7/27/2012	DESTATE...		7/27/2013		

Display This Item's Holds Display Another Item's Holds Close

3. In the List of Holds, you can review basic hold information. Click the glossary link in the User ID column to display detailed information about the patron. Click the glossary link in the Status column to display detailed information about the item.

NOTE You can sort items in the list of holds in ascending or descending order. To do this, simply click the column heading of the column you want to sort.

Modify Holds for User Wizard

The **Modify User Holds** wizard lets you change the following information about a user's hold:

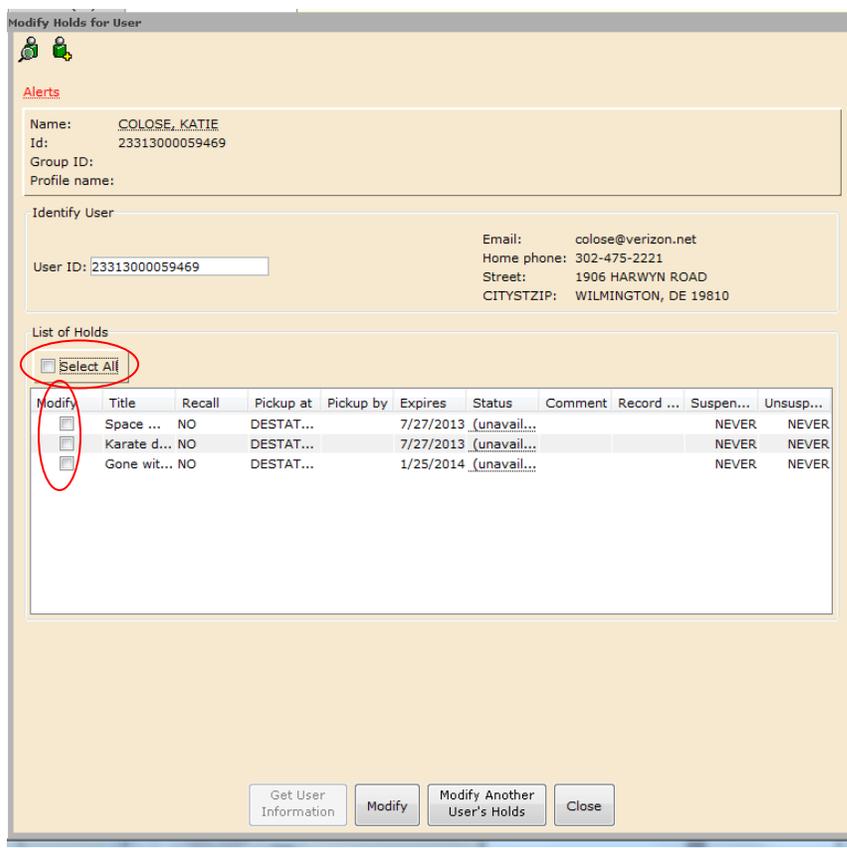
- Pickup Library
- Expiration Date
- Comment
- Date suspended/unsuspended

NOTE You cannot modify the level and range of a hold.

To modify a user's hold

1. On the Holds toolbar, click the **Modify Holds for User** wizard . The Modify Holds for User window appears.

2. Scan the barcode from the user's card, or type the **User ID** and tap the **Enter** key or click **Get User Information**. The following window appears:



Modify Holds for User

Alerts

Name: COLOSE, KATIE
Id: 23313000059469
Group ID:
Profile name:

Identify User

User ID:

Email: colose@verizon.net
Home phone: 302-475-2221
Street: 1906 HARWYN ROAD
CITY/STATE/ZIP: WILMINGTON, DE 19810

List of Holds

Select All

Modify	Title	Recall	Pickup at	Pickup by	Expires	Status	Comment	Record ...	Suspension...	Unsuspend...
<input type="checkbox"/>	Space ...	NO	DESTAT...		7/27/2013	(unavail...			NEVER	NEVER
<input type="checkbox"/>	Karate d...	NO	DESTAT...		7/27/2013	(unavail...			NEVER	NEVER
<input type="checkbox"/>	Gone wit...	NO	DESTAT...		1/25/2014	(unavail...			NEVER	NEVER

3. You can make changes to single holds by clicking **Modify** in front of each item, or click **Select All** to change all items at the same time. Click **Modify**. The following window appears:

Modify Holds for User : COLOSE, KATIE

Modify Holds Fields

Allow Recall No Recall Recall now (RUSH)

Pickup at: Expires:

Date suspended: Date unsuspended:

Comment: Append Replace Remove

OK Cancel

4. Make appropriate changes.
5. Click **OK** to save the changes and close the window.

Modify Holds for Item Wizard

The **Modify Holds for Item** wizard lets you change the following information about a hold:

- Pickup Library
- Expiration Date
- Comment
- Date suspended/unsuspended

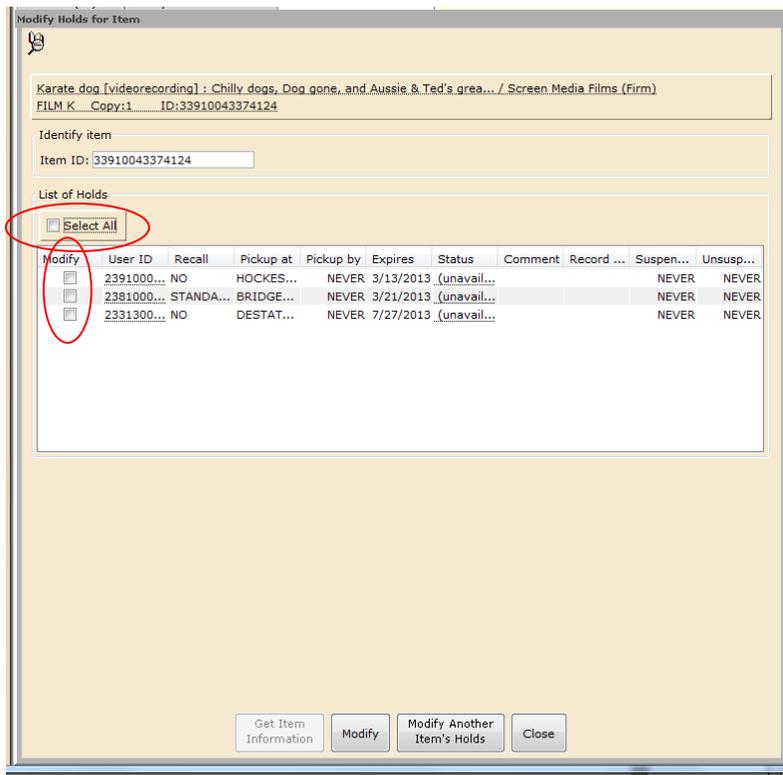
NOTE You cannot modify the level and range of a hold.

To make a change to an existing item hold

1. On the Holds Information and Maintenance toolbar, click the **Modify Holds for**

Item wizard . The Item Search window appears.

2. Scan the item barcode, or type the **Item ID**, or use the **Item Search Helper** to find the item. The holds now appear:



Modify Holds for Item

Karate dog [videorecording] : Chilly dogs, Dog gone, and Aussie & Ted's grea... / Screen Media Films (Firm)
FILM K Copy:1 ID:33910043374124

Identify item
Item ID: 33910043374124

List of Holds

Select All

Modify	User ID	Recall	Pickup at	Pickup by	Expires	Status	Comment	Record ...	Suspen...	Unsus...
<input type="checkbox"/>	2391000...	NO	HOCKES...	NEVER	3/13/2013	(unavail...			NEVER	NEVER
<input type="checkbox"/>	2381000...	STANDA...	BRIDGE...	NEVER	3/21/2013	(unavail...			NEVER	NEVER
<input type="checkbox"/>	2331300...	NO	DESTAT...	NEVER	7/27/2013	(unavail...			NEVER	NEVER

Get Item Information Modify Modify Another Item's Holds Close

3. Review the items and decide whether to change the information on all holds or on selected holds.

- To modify all holds, select the **Select All** check box.
- To modify selected holds, select the **Modify** check boxes in front of the holds you want to change.

4. Click **Modify**. The following window appears:

The screenshot shows a dialog box titled "Modify Holds for User : COLOSE, KATIE". The dialog box has a light beige background and a grey border. At the top, it says "Modify Holds Fields". Below this, there are three radio buttons: "Allow Recall", "No Recall", and "Recall now (RUSH)". Underneath, there are four date fields: "Pickup at:" (a dropdown menu), "Expires:" (a text box with a calendar icon), "Date suspended:" (a text box with a calendar icon), and "Date unsuspended:" (a text box with a calendar icon). Below the date fields, there are three radio buttons for "Comment": "Append", "Replace", and "Remove". At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

5. Change the appropriate information, and click **OK** to save the changes and redisplay the Modify Holds window.

6. Click **Close**.

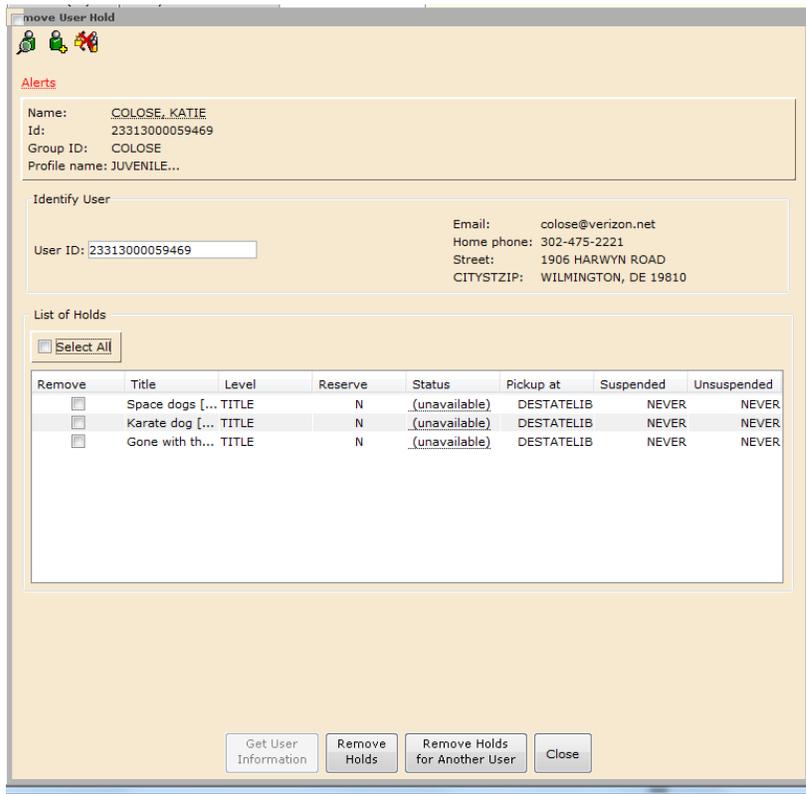
Remove User Hold Wizard

The **Remove User Hold** wizard removes holds for a specific user. This might be necessary if the user no longer wants the material.

To remove holds placed by a specific user

1. On the Holds toolbar, click the **Remove User Hold** wizard .

2. Scan the barcode from the user's card, or type the **User ID** and tap the **Enter** key or click **Get User Information**. The holds now appear:



Alerts

Name: COLOSE, KATIE
Id: 23313000059469
Group ID: COLOSE
Profile name: JUVENILE...

Identify User

User ID:

Email: colose@verizon.net
Home phone: 302-475-2221
Street: 1906 HARWYN ROAD
CITYSTZIP: WILMINGTON, DE 19810

List of Holds

Select All

Remove	Title	Level	Reserve	Status	Pickup at	Suspended	Unsuspended
<input type="checkbox"/>	Space dogs [... TITLE		N	(unavailable)	DESTATELIB	NEVER	NEVER
<input type="checkbox"/>	Karate dog [... TITLE		N	(unavailable)	DESTATELIB	NEVER	NEVER
<input type="checkbox"/>	Gone with th... TITLE		N	(unavailable)	DESTATELIB	NEVER	NEVER

Get User Information Remove Holds Remove Holds for Another User Close

3. Choose which holds to remove:

- To remove all holds, select the **Select All** check box.
- To remove selected holds, select the **Remove** check boxes in front of the holds you want to remove.

4. Click **Remove Holds**.

5. Click **Close** to exit this window, or click **Remove Holds for Another User** to continue.

NOTE: Once you remove a hold, WorkFlows checks to see if the item has another hold on it and which library owns the item. If the next hold has a different pickup library, or if the item is owned by a different library, WorkFlows either puts the item in transit automatically or prompts you to put the item in transit.

Remove Item Hold Wizard

The **Remove Item Hold** wizard removes a hold placed on a specific item. This might be necessary for a lost item or an item that needs repair.

To remove a hold on an item



1. On the Holds toolbar, click the **Remove Item Hold** wizard.
2. Scan the item barcode, or type the **Item ID** and tap the **Enter** key or click **Get Item Information**. The holds now appear:

The screenshot shows the 'Remove Item Hold' wizard interface. At the top, it displays the item title: 'Karate dog [videorecording] : Chilly dogs, Dog gone, and Aussie & Ted's grea... / Screen Media Films (Firm)' and the item ID: '33910043374124'. Below this is an 'Identify item' section with a text box containing the item ID. The main section is titled 'List of Holds' and contains a table with columns: Remove, User ID, User Name, Level, Reserve, Status, Pickup at, Suspended, and Unsuspen... The table lists three holds, each with a 'Remove' checkbox. At the bottom of the wizard are four buttons: 'Get Item Information', 'Remove Holds', 'Remove Holds for Another Item', and 'Close'.

Remove	User ID	User Name	Level	Reserve	Status	Pickup at	Suspended	Unsuspen...
<input type="checkbox"/>	239100023...	PATTERSO...	TITLE	N	(unavailab...	HOCKESSIN	NEVER	NEVER
<input type="checkbox"/>	238100002...	MONTES, Y...	TITLE	N	(unavailab...	BRIDGEVILL	NEVER	NEVER
<input type="checkbox"/>	233130000...	COLOSE, K...	TITLE	N	(unavailab...	DESTATELIB	NEVER	NEVER

3. Choose which holds to remove:
 - To remove all holds, select the **Select All** check box.
 - To remove selected holds, select the **Remove** check boxes in front of the holds you want to remove. (Use the column headings to sort if necessary)
4. Click **Remove Holds**.
5. Click **Close** to exit this window, or click **Remove Holds for Another Item** to continue.

NOTE: Once you remove a hold, WorkFlows checks to see if the item has another hold on it and which library owns the item. If the next hold has a different pickup library, or if the item is owned by a different library, WorkFlows either puts the item in transit automatically or prompts you to put the item in transit.