



On the List: Holds Management in Evergreen

Holds - <http://docs.sitka.bclibraries.ca/Sitka/current/html/hold.html>

Hold Filling Explained - http://docs.sitka.bclibraries.ca/Sitka/current/html/hold_holds_filling_explained.html

Hold Related Report Templates

1. Hold Policy Reports [**Sitka Templates -> Library Configuration**]
 - a. Hold Policies by Item's Owning Library
 - b. Hold policy by pickup library
2. Other Holds Reports [**Sitka Templates -> Holds**]
 - a. Long-time Unfulfilled Holds without a current target (with copy status info)
 - b. Monthly Fulfilled Holds Count
 - c. Outstanding holds count by title (excluding volume or copy level holds)
 - d. Monthly Total Holds Placed

Find Another Target for Holds

If there is an item on your Holds Pull List but you cannot fill the hold, staff can do one of the following:

- Mark the copy missing or damaged
- Retarget the hold to find another copy
 - Actions for Selected Holds → Find Another Target.
 - Evergreen immediately searches for an available copy for the hold and puts it on the Holds Pull List. If there is no available copy, the hold status will be set to "Wait for copy".
- Leave the item on the pull list - do not capture the hold
 - When Evergreen re-targets holds (at least once a day, but at different time for individual holds), it removes the current target, then picks up one.
 - Situation wise, it may or may not target the original copy.
 - A copy that has been on a Pull List for a day may likely disappear when the hold is retargeted.

<http://docs.sitka.bclibraries.ca/Sitka/current/html/hold-find-another-target.html>

Remember to never cancel a hold placed for pickup at another library - If your copy has been targeted and you can't fill the hold mark the item as missing or damaged or find another target.

Hold related Library Settings - <http://docs.sitka.bclibraries.ca/Sitka/current/html/lsa-library-settings.html>

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|---|---|-------------------|
| Behind desk pickup supported | If a branch supports both a public holds shelf and behind-the-desk pickups, set this value to true. This gives the patron the option to enable behind-the-desk pickups for their holds by selecting Hold is behind Circ Desk flag in patron record. | <u>True/False</u> |
| Cancelled holds display age | Show all cancelled holds that were cancelled within this amount of time | <u>Duration</u> |
| Cancelled holds display count | How many cancelled holds to show in patron holds interfaces | <u>Number</u> |
| Default hold shelf expire interval | Hold Shelf Expiry Time is calculated and inserted into hold record based on this interval when capturing a hold. | <u>Duration</u> |
| Expire interval | Amount of time until an unfulfilled hold expires | <u>Duration</u> |
| Has local copy alert | If there is an available copy at the requesting library that could fulfill a hold during hold placement time, alert the patron. | <u>True/False</u> |
| Has local copy block | If there is an available copy at the requesting library that could fulfill a hold during hold placement time, do not allow the hold to be placed. | <u>True/False</u> |
| Reset request time on un-cancel | When a hold is uncancelled, reset the request time to push it to the end of the queue | <u>True/False</u> |
| Target copies for a hold even if copy's circ lib is closed | If this setting is true at a given org unit or one of its ancestors, the hold targeter will target copies from this org unit even if the org unit is closed (according to the actor.org_unit.closed_date table). | <u>True/False</u> |
| Target copies for a hold even if copy's circ lib is closed IF the circ lib is the hold pickup lib | If this setting is true at a given org unit or one of its ancestors, the hold targeter will target copies from this org unit even if the org unit is closed (according to the actor.org_unit.closed_date table) IF AND ONLY IF the copy's circ lib is the same as the hold pickup lib. | <u>True/False</u> |
| Hold shelf status delay | The purpose is to provide an interval of time after an item goes into the on-holds-shelf status before it appears to patrons that it is actually on the holds shelf. This gives staff time to process the item before it shows as ready-for-pickup. | <u>Duration</u> |
| Block hold request if hold recipient privileges have expired | | <u>True/False</u> |
| Checkout fills related hold | When a patron checks out an item and they have no holds that directly target the item, the system will attempt to find a hold for the patron that could be fulfilled by the checked out item and fulfills it. On the Staff Client you may notice that when a patron checks out an item under a title on which he/she has a hold, the hold will be treated as filled though the item has not been assigned to the patron's hold. | <u>True/false</u> |
| Checkout fills related hold on valid copy only | When filling related holds on checkout only match on items that are valid for opportunistic capture for the hold. Without this set a Title or Volume hold could match when the item is not holdable. With this set only holdable items will match. | <u>True/False</u> |