

How Holds Work



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A Day in the life of a Marmot Hold

1. Hold is placed
2. Hold is paged
3. Hold is filled
4. Patron is notified



Hold is placed

- Patrons or staff can place holds
 - Patrons place holds through Pika
 - Staff place holds through Sierra
- Benefits of patrons placing their own holds
 - Staff are free for other tasks
 - Patrons can get what they want
 - Other similar titles
 - Patrons get a better understanding of the system
- Benefits of staff placing holds for patrons
 - Staff are more familiar with the system
 - Staff can place item level holds to get a specific copy
 - Staff can mention fines or other messages to the patron

Title Level vs Item Level

- Title Level Holds
 - Any holdable copy can fill the hold
 - When paged all pageable locations are notified
 - Can be quicker if all local copies are not on shelf

- Item Level Holds
 - Only selected item can fill the hold
 - Only the item's library is paged
 - Allows patrons to get specific copies of an item
 - Special editions
 - Local items



Hold is paged

- Title level paging
 - Paging takes place at the pickup location first
 - The order of subsequent locations is determined by paging priority
 - Checked in items will interrupt the paging
- What items can be paged?
 1. Loan rule allows for holds
 2. Item is available
 3. Not checked out
 4. No existing hold on item (Agency and local holds)
 5. Special caveat for Item level holds

Hold is paged

- Item level paging
 - For available items that can fill item level hold
 - If staff placed, paging only occurs if item is not local
 - If item is unavailable staff manually transfer to another item
- Additional details
 - Skips closed locations
 - Paging gets trapped for 24 hours
 - Process in the morning at 2am to move unfilled items to the next library
 - Doesn't stop checked in items from filling holds

Paging Priority

1. Pickup location is first
2. Next is the lowest number
3. Numbers that are the same are random
4. Lowest number is picked last
5. Libraries with 0 are never paged

Display Name	Paging Priority
Grand Co Granby C716	800
Grand County HSS C724	800
Gunnison Ann Zugelder Lib C...	800
Gunnison Old Rock Library C5...	800
MCPLD Clifton Branch C566	600
MCPLD Collbran Branch C560	600
MCPLD De Beque Branch C564	600
MCPLD Fruita Branch C536	600
MCPLD Gateway C508	610
MCPLD Homebound C508	610
MCPLD Orchard Mesa Br C510	600
MCPLD Palisade Branch C558	600



Hold is filled

- Hold is filled in order of placement
- Patron's numerical order in hold queue isn't always accurate
- Things that can alter fulfillment
 - Not wanted before date
 - Local hold preference
 - Agency Holds
 - Frozen holds



Local Holds & Agency Holds

- Local hold preference
 - Gives preference to patrons who select the hold pickup location of the owning library
 - Does not work across a library district
 - Pitfall with popular items where some libraries don't have copies
- Agency hold preference
 - Similar to local holds, except works when patron agency matches item agency
 - Local holds comes first, then agency holds, then earliest system wide hold

Patron is Notified

- Once a hold has a status of “On Holdshelf” the system queues a notification to be sent
 - Gets sent when library runs hold pickup notices
 - Needs to have a hold pickup notice set in the loan rule
 - Patrons get a notification based on their preference
 - Items stay on the holdshelf for a total of 8 days (pulled on the 8th)
- Staff get a holdshelf slip
 - Can be customized with print templates
 - Usually includes a pull date
 - If library has a public holdshelf aliases are suggested

Other Important Details

- Clear Holdshelf
 - Removes holds from holdshelf with a pull date of yesterday or earlier
 - Removes cancelled holds
 - Deletes holds with a “Not Wanted After” date of yesterday or earlier
 - Recommended to be ran at each library daily
- High Demand Holds
 - What titles have a larger number of holds?
 - Compares number of holds to number of items
 - Controlled by hold threshold number

Other Important Details cont'd

- View Outstanding Holds
 - Used to identify holds that have been around “too long”
 - Provides a summary of holds
 - Limits
 - Date placed
 - Pickup location
 - Many columns can be toggled
 - Snapshot as of 4:00am

#	Date Placed	Not Needed A...	Patron Info	TITLE	CALL #	LOCATION	Pickup Location	Hold Status
1	05-04-2015	11-03-2015		4 movie marathon romantic comedy collect	No Call Num		ep	Bib hold, 1 attached item with 1 of 1 holds
2	08-06-2015	02-04-2016		10% happier : how I tamed the voice in m	No Call Num		ep	Bib hold, 1 attached item with 1 of 1 holds
3	12-05-2013	--		24. Season three [videorecording (DVD)]	No Call Num		ep	Bib hold, 1 attached item with 1 of 1 holds
4	07-22-2013	--		42 [videorecording] / Legendary Picture	No Call Num		ep	Bib hold, 1 attached item

Grill the Marmots (aka Any Questions?)

