

Best Practices for Holds

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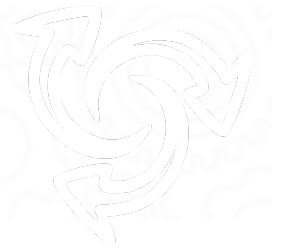
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Best Practices for Holds

Last Updated: \$action.dateFormatter.formatDateTime(\$content.getLastModificationDate())



Best Practices



This page has been moved over to <https://support.goalexandria.com/knowledge-base/best-practices-for-holds/>

Holds

A **Hold** allows a patron to request a copy of a book so that it can be picked up later, or if the book is currently checked out, allows the patron to request it once it has been returned. Once an item has been placed on **Hold** by a patron, it will be assigned a status. This status, defined below, are automatically assigned.

- **On-Hold.** A request has been made for a copy of a title when it becomes available.
- **On-Shelf Hold.** A request has been made for a specific copy, however, this copy is still on the shelf somewhere in the library. The librarian can run an On-Shelf report, retrieve all the titles on the report and bookdrop them so Alexandria can set the status to **In-Stock**.
- **In-Stock Hold.** A specific copy has been assigned to fill the request and is in the **Holds** area. If a hold request has been made against a book that is currently checked out, when it is returned, it will automatically be listed as **In-Stock**.
- **In-Stock Expired.** A specific copy is in the holds area, however, the patron has either cancelled the request or the request has expired. The librarian should periodically run a scheduled **In-Stock Expired Report** to return **In-Stock Expired** copies to the library system.
- **In-Transit Hold.** A hold request has been made against a copy in a multi-site system and is currently being transferred.

Enable Holds

To allow holds, some preferences need to be configured correctly:

- **Preferences > Researcher > Search/Explore > Results List:** Make sure **Show Hold Controls** is on.
- **Preferences > Policies > Item Policies > Other:** Verify that **Allow Hold Requests** is on and that there isn't an exception in place.
- **Preferences > Policies > Patron Policies > Other:** Verify that there is a **Maximum Hold Requests** greater than zero and that there isn't an exception in place.
- **Preferences > Security > Patron > Account:** Make sure **Holds** is set to **Manage** for your patron security group.

If you have all of these preferences set and a patron still can't place a hold, make sure they're logged in to Researcher.

Reports

Alexandria provides a number of reports. Some of these relate directly to holds and should be run on a regular basis. The most useful for holds are listed and explained below.

- **In-Stock Hold Notice.** This report will generate notices for patrons that their item is **In-Stock** and is being held for them.
- **In-Stock Holds.** This report generates a list of all patrons with holds that are currently **In-Stock**.
- **Pending Holds.** This report generates a list of all patrons with **Pending Holds**.
- **Current Site Overdue ILL Information.** This report will produce a list of patrons at the current site with overdue items belonging other sites. This is useful in identifying your patrons that need to return items to other sites.
- **Expired In Stock Holds.** This report will produce a list of in-stock holds that have expired and need to be bookdropped so they can return to their home site or fulfill a hold elsewhere.
- **In Transit from Current Site.** This report will produce a list of items **In-Transit** from the current site. Useful in determining what you have sent out to other sites that have not yet arrived.
- **In Transit from Current Site, Late In Arriving.** This report will produce a list of items **In-Transit** from the current site, which are late in arriving. Useful in determining what you have sent out to other sites that have not yet arrived and *should* have, according to the average transit period set in preferences.

- **In Transit Holds for Current Site.** This report will produce a list of holds that are on **In-Transit** hold for the current site. Useful in seeing books coming your way to fill holds for your patrons.
- **In Transit to Current Site.** This report will produce a list of items **In-Transit** to the current site. Useful in determining what has been sent to you that has not yet arrived.
- **In Transit to Current Site, Late In Arriving.** This report will produce a list of items **In-Transit** to the current site, which are late in arriving. Useful in determining what has been sent to you that has not yet arrived and *should* have, according to the average transit period set in preferences.
- **On-Shelf Holds.** This is for librarians to identify items that are located on the shelf of the owning library. The librarian should fetch it, bookdrop it, which would then assign its status to **In-Stock Hold**, where it is then placed in the holds area of the library or **In-Transit** to fill a hold at another site.
- **Needed for Reservation Notice.** This report generates a notice that an item or items are required for **Reservations**.
- **Reservations List.** This report generates a list of patrons and items that have **Reservations**.
- **Reserved Items List.** This report generates a list of patrons and items that are currently **Reserved**.

Flow Chart

