

## Chapter 21 -- Holds

### Viewing Holds

To view holds for a record, under **Actions for this Record (Alt +A)**, select **View Holds (Alt + S)**. You can do this from any record view. You do not have to be in Holdings Maintenance.

The View Holds screen opens:

**Record Summary**

**Title:** Twilight : a novel [\(View MARC\)](#)  
**Author:** Mosby, Katherine **Edition:** 1st ed. **Pub Date:** c2005  
**TCN: (OCLC)** **Created By:** (EG-IN) **Last Edited By:** (EG-IN) **Last Edited On:**  
 ocm56807811 101010101010101 101010101010101 08/24/08  
 Record 1 of 1     [Actions for this Record](#)

**Holds** [Actions for Selected Holds](#)

Available On	Capture Date	Current Copy	Last Notify Time	Notices	Pickup Lib	Request Date	Status	Title	Type
		3750000248...		0	MVPLM	2008-10-06	Waiti...	Twili...	T
		3732300153...		0	MVPLM	2008-09-30	Waiti...	Twili...	T
2008-10-23	2008-10-23	3732300164...		0	MVPLM	2008-09-20	Ready...	Twili...	T
2008-09-09	2008-09-09	3732300164...		0	MVPLM	2008-09-09	Ready...	Twili...	T
		117644-6002		0	JCPLS	2008-10-07	Waiti...	Twili...	T
2008-10-22	2008-10-22	3750000304...	2008-10-22T17...	1	JCPLS	2008-10-06	Ready...	Twili...	T
		117644-4002		0	JCPLC	2008-09-24	Waiti...	Twili...	T
2008-10-15	2008-10-15	3750000304...		0	JCPLS	2008-09-15	Ready...	Twili...	T
2008-10-18	2008-10-18	3750000304...		0	JCPLC	2008-09-12	Ready...	Twili...	T
2008-10-03	2008-10-03	3419400074...		0	UCPLB	2008-10-03	Ready...	Twili...	C
	2008-10-22	3394600168...		0	PLFDP	2008-09-08	In-Tr...	Twili...	T

## Placing Holds

To place a hold, you need to go to OPAC view of the record you wish to place a hold on.

The screenshot shows a web browser window with the address bar displaying "1: hm-cat1@HMMPL-laptop1.evergreen.lib.in.us". The browser's address bar contains two tabs: "1 Bib Record: ocm56807811" and "2 Bib Record: ocn123118933". The main content area displays a "Record Summary" for the book "Twilight" by Stephenie Meyer. The summary includes fields for Title, Author, Edition, Publication Date, and Physical Description. A "Place Hold" button is circled in red in the "Record Summary" line. Below the summary is a table with the following data:

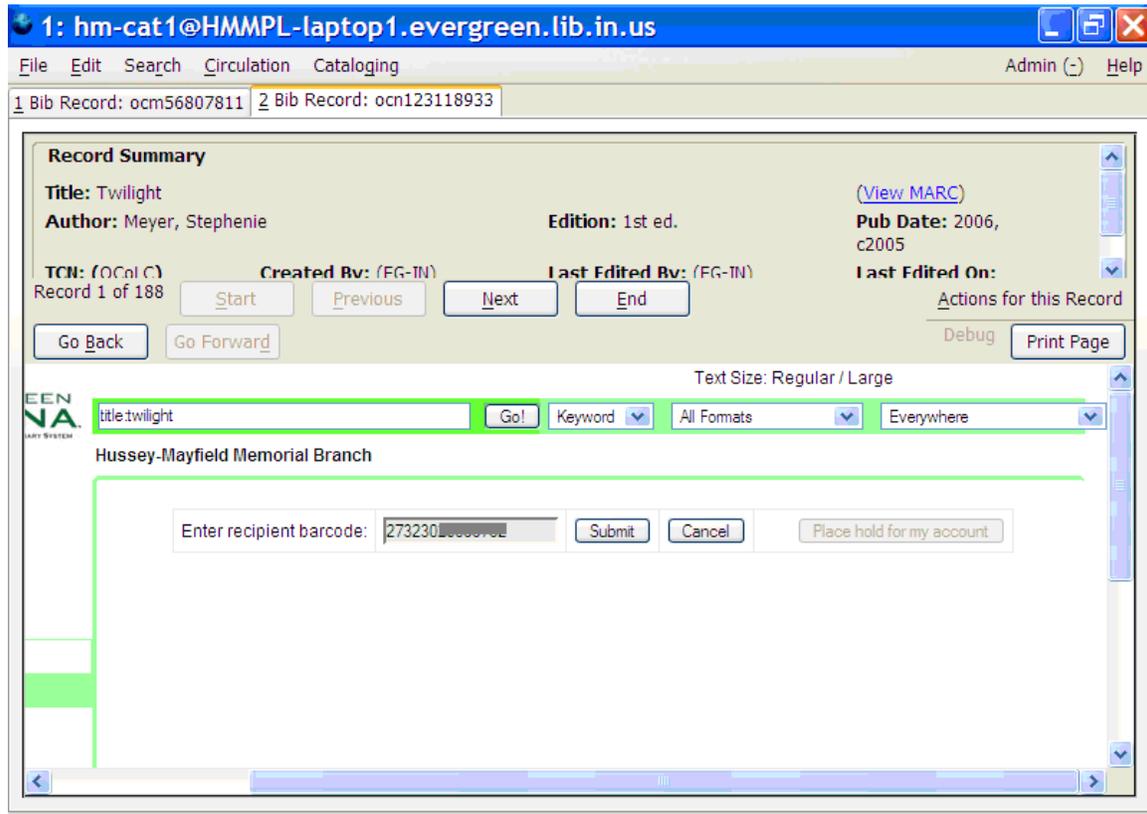
Title	Twilight
Author	Meyer, Stephenie
ISBN	0316160172
Edition	1st ed.
Publication Date	2006, c2005
Publisher	Little, Brown and Co.
Physical Description	print 498 p. ; 22 cm.
Format	text

Click **Place Hold**, in the green Record Summary line, next to the More Actions box.

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The screen will change to one with a box to enter the patron barcode:



Type, scan or paste the patron barcode for the person for whom you are placing the hold into the box labeled "Enter Recipient Barcode." Then click Submit.

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A new screen will open with the patron and item information:

The screenshot shows a web browser window with the address bar displaying "1: hm-cat1@HMMPL-laptop1.evergreen.lib.in.us". The browser has a menu bar with "File", "Edit", "Search", "Circulation", and "Cataloging". The page title is "1 Bib Record: ocm56807811 | 2 Bib Record: ocn123118933".

The main content area is titled "Record Summary" and contains the following information:

- Title:** Twilight
- Author:** Meyer, Stephenie
- Edition:** 1st ed.
- Pub Date:** 2006, c2005
- TCN: (OCoLC)** Record 1 of 188
- Created By:** (EG-IN)
- Last Edited By:** (EG-IN)
- Last Edited On:**

Navigation buttons include "Go Back", "Go Forward", "Start", "Previous", "Next", and "End". There are also "Debug" and "Print Page" buttons.

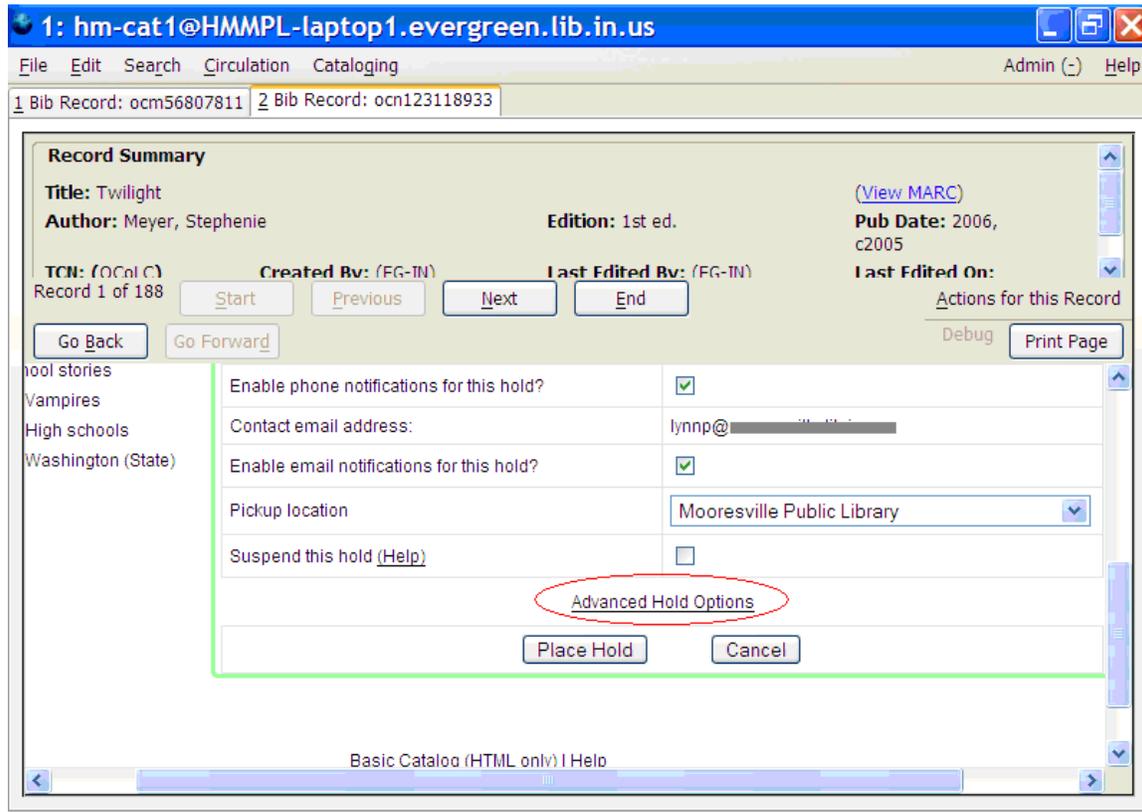
A sidebar on the left lists various categories: "unt", "logged in as", "Results", "Details" (highlighted), "ant Subjects", "Schools", "ool stories", "Vampires", "High schools", and "Washington (State)".

The main table displays the following details:

Recipient:	[Redacted] Lynn
Title:	Twilight
Author:	Meyer, Stephenie
Format:	Books
Physical Description:	print 498 p. ; 22 cm.
Contact telephone number:	317-[Redacted] (xxx-yyy-zzzz)
Enable phone notifications for this hold?	<input checked="" type="checkbox"/>
Contact email address:	lynnp@[Redacted]
Enable email notifications for this hold?	<input checked="" type="checkbox"/>
Pickup location:	Mooreville Public Library

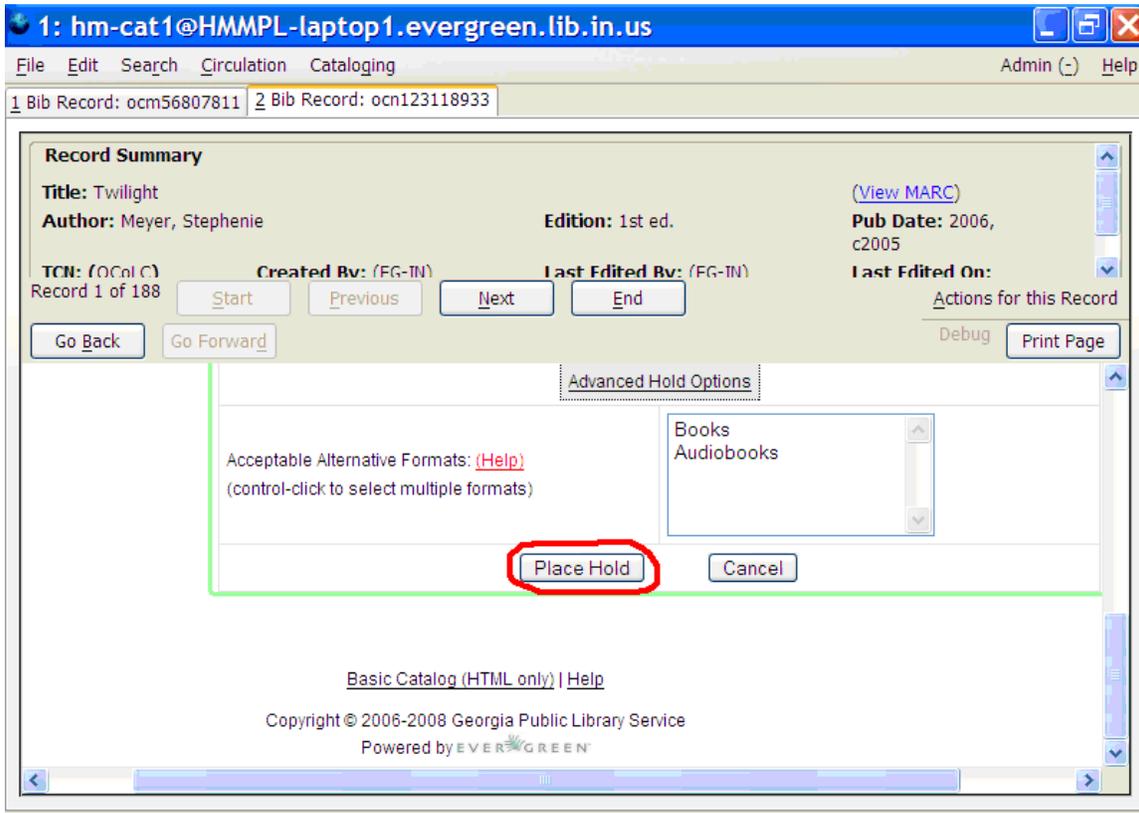
At this point you can edit the patron phone number, enable or disable phone and email notifications, suspend the hold to a certain date, and change the pickup location for the book.

You can also select **Advanced Hold Options** at the bottom of the screen:



This allows you to do a “Meta” record hold. A meta hold is a hold on multiple manifestations of an item, such as regular and large print, or large print and audiobook.

When you click on **Advanced Hold Options**, a box will open up listing alternate formats:



In the staff client, only the formats for which there are holdings in Evergreen Indiana for that item will be listed. In the OPAC all formats are listed for every item, regardless of whether or not these formats are owned by EI.

If you select formats as being “Acceptable Alternative Formats,” the patron’s hold will be filled with the first available item. If Books is selected, the paperback or large print editions could fill the hold, even when the hold is placed on the hardback record. If Audiobooks is selected, the patron could also receive the audiobook if that is the first available version of the item. If audiobooks are selected, the patron could receive a cassette or CD version if their library owns both.

Once you have all of the information entered as desired, click Place Hold.

A dialog box will open up to inform you that the hold was successful:



If the hold fails, a dialog box will open up indicating that the hold you are trying to place is invalid. For instance, if you try to place a hold on an audiovisual item where your library has no holdings, or if the patron has reached the limit of holds a person can place.

### Placing Copy Level Holds

Copy level holds can only be placed from the staff client. It's currently not possible to place copy level holds from the OPAC. To place an item level hold, look at the record in the OPAC. Click on the **details** link, under Actions, seen below:

Record Summary

Title: Secrets of Dripping Fang : Book four : Fall of the House of Mandible  
 Author: Greenburg, Dan.  
 Edition: 1st ed.  
 Pub Date: c2006  
 TCM: (OCLC) [ocm68629837](#) Created By: (EG-IN) [101010101010101](#) Last Edited By: (EG-IN) [101010101010101](#) Last Edited On: 08/24/08

Record 1 of 13 [Start] [Previous] [Next] [End] Actions for this Record: [Debug] [Print Page]

Go Back [Go Forward]

Hussey-Mayfield Memorial Branch

Result 1 of 13 >> End

Record Summary [Place Hold] [More Actions...]

Title	Secrets of Dripping Fang : Book four : Fall of the House of Mandible
Author	Greenburg, Dan.
ISBN	0152054758
Edition	1st ed.
Publication Date	c2006
Publisher	Harcourt
Physical Description	print 147 p. : ill ; 20 cm.
Format	text
Abstract	After the Mandible sisters kidnap his sister, Wally seeks the help of a group of orphans and his vampire father.

Copy Summary Shelf Browser Reviews Excerpt Author Notes MARC Record

View copy information for all libraries

Library	Callnumber	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order
<b>Zionsville Public Library</b>									
Hussey-Mayfield Memorial Branch	FIC GREENBURG	<a href="#">details</a> <a href="#">browse</a> <a href="#">place</a> <a href="#">hold</a>	0	2	0	0	0	0	0

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The barcodes attached to the record at the library you are viewing will display:

The screenshot shows a web browser window with the URL `1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us`. The page title is "1 Bib Record: ocm68629837". The record summary includes the following information:

- Title:** Secrets of Dripping Fang : Book four : Fall of the
- Author:** Greenburg, Dan.
- TCN:** (OCLC) [ocm68629837](#)
- Created By:** (EG-IN) [101010101010101](#)
- Edition:** 1st ed.
- Last Edited By:** (EG-IN) [101010101010101](#)
- Pub Date:** c2006
- Last Edited On:** 08/24/08

Navigation buttons include "Start", "Previous", "Next", "End", "Go Back", and "Go Forward". A sidebar on the left shows a tree view with "Brothers and sisters" and "Twins".

Below the record summary, there are tabs for "Copy Summary", "Shelf Browser", "Reviews", "Excerpt", "Author Notes", and "MARC Record". The "Copy Summary" tab is active, showing "View copy information for all libraries".

Library	Callnumber	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order
<b>Zionsville Public Library</b>									
Hussey-Mayfield Memorial Branch	FIC GREENBURG	<a href="#">details</a> <a href="#">browse</a> <a href="#">place</a> <a href="#">hold</a>	0	2	0	0	0	0	0

Below the table, there is a "print these details" link and a table of individual copies:

Barcode	Status	Location	Age Hold Protection	Create Date	Holdable	Due Date
33946001860563	Checked out	Fiction - 1st Floor	6month	2007-05-01	Yes	2009-01-06
33946001895809	Checked out	Fiction - 1st Floor	6month	2007-08-09	Yes	2008-12-29

Next to each barcode is a link to place a hold. When you put your mouse over the link it will turn red, as seen above. Click the link next to the copy you wish to place the hold on.

The screenshot shows the same record summary as above, but with a search bar and a "Place hold for my account" button highlighted with a red circle. The search bar contains the text "title:secrets of dripping fang" and has a "Go!" button. The search results are displayed for "Hussey-Mayfield Memorial Branch".

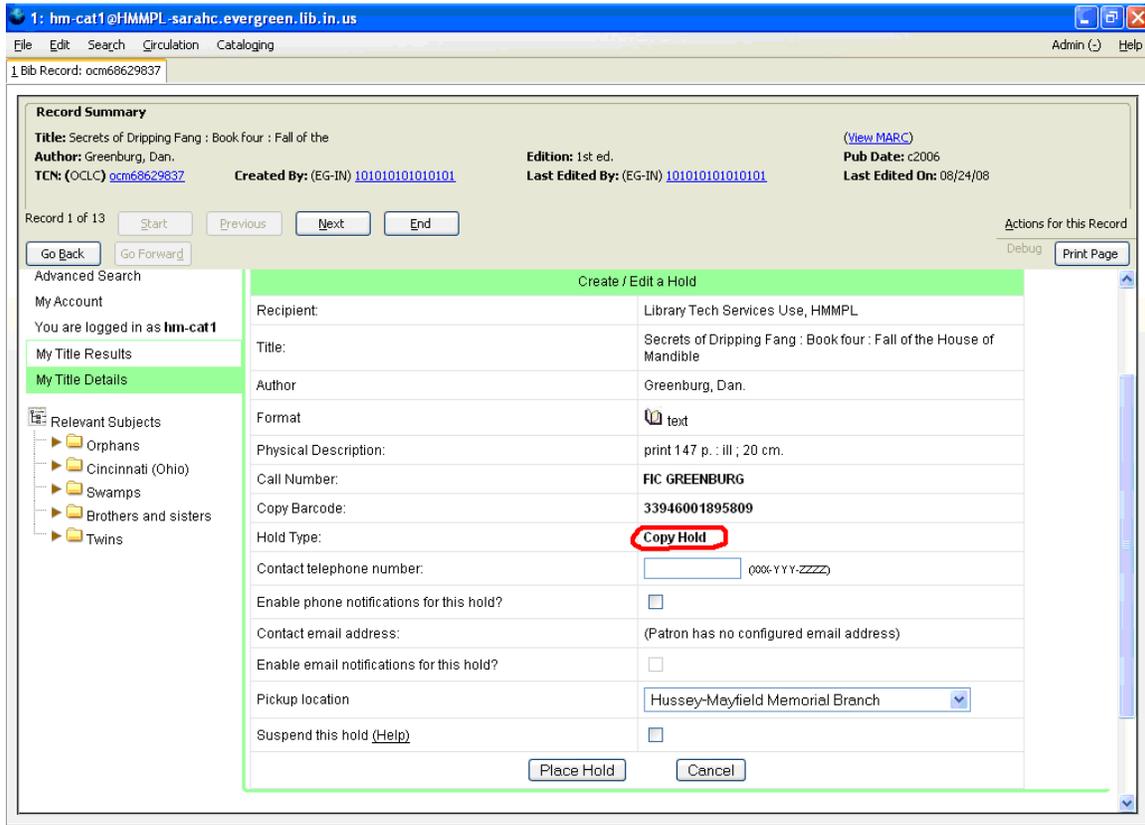
Below the search bar, there is a form with the following fields and buttons:

- Enter recipient barcode:
- Submit
- Cancel
- Place hold for my account** (highlighted with a red circle)

You will be taken to the screen to place your hold. Note that you can click **Place hold for my account** to place a hold for your staff user account, or you can enter a barcode.

Last Updated: 2/3/2009

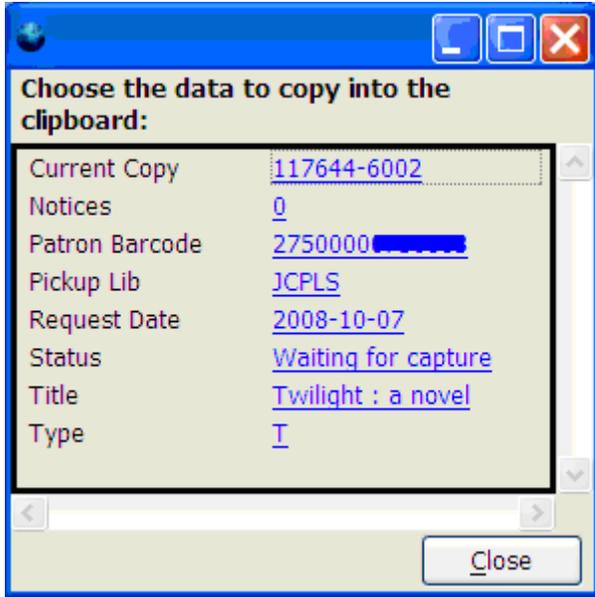
Note that on the Hold Type is **Copy Hold**:



Proceed just as you would for a record level hold. See **Placing Holds** on page 21.2, if needed.

## Transferring Holds

To transfer holds from one item to another, open the record you need to transfer the hold from in one tab and the record you need to transfer the hold to in another tab. First view the holds on the record where the hold is currently. You will copy the patron barcode of the hold you need to move. Select Patron barcode in the column picker. Then right-click on the line you need, and select Copy to Clipboard. A box will open up with data from that line:



Click on the patron barcode. Make sure you do not click on the item barcode, if it is in your box.

A box will open up telling you what has been copied to the clipboard:



Click **OK** or press **Enter**. You can now use this patron barcode to place a hold. Go to the tab where you have opened the record where you need to move the hold. See **Placing Holds** on page 21.2, if needed, for instructions on how to place the hold.

Then you will need to cancel the hold on the first record.

### **Canceling Holds**

To cancel a hold, view the holds for the item. See **Viewing Holds** on page 21.1. Highlight the hold you need to cancel. Click **Actions for Selected Holds (Alt + S)**. Select **Cancel Hold (Alt + C)**.

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The screenshot shows a web browser window with the address bar displaying "1: hm-cat1@HMMPL-laptop1.evergreen.lib.in.us". The browser has tabs for "Bib Record: ocm56807811" and "Bib Record: ocn123118933". The main content area is titled "Record Summary" and displays the following information:

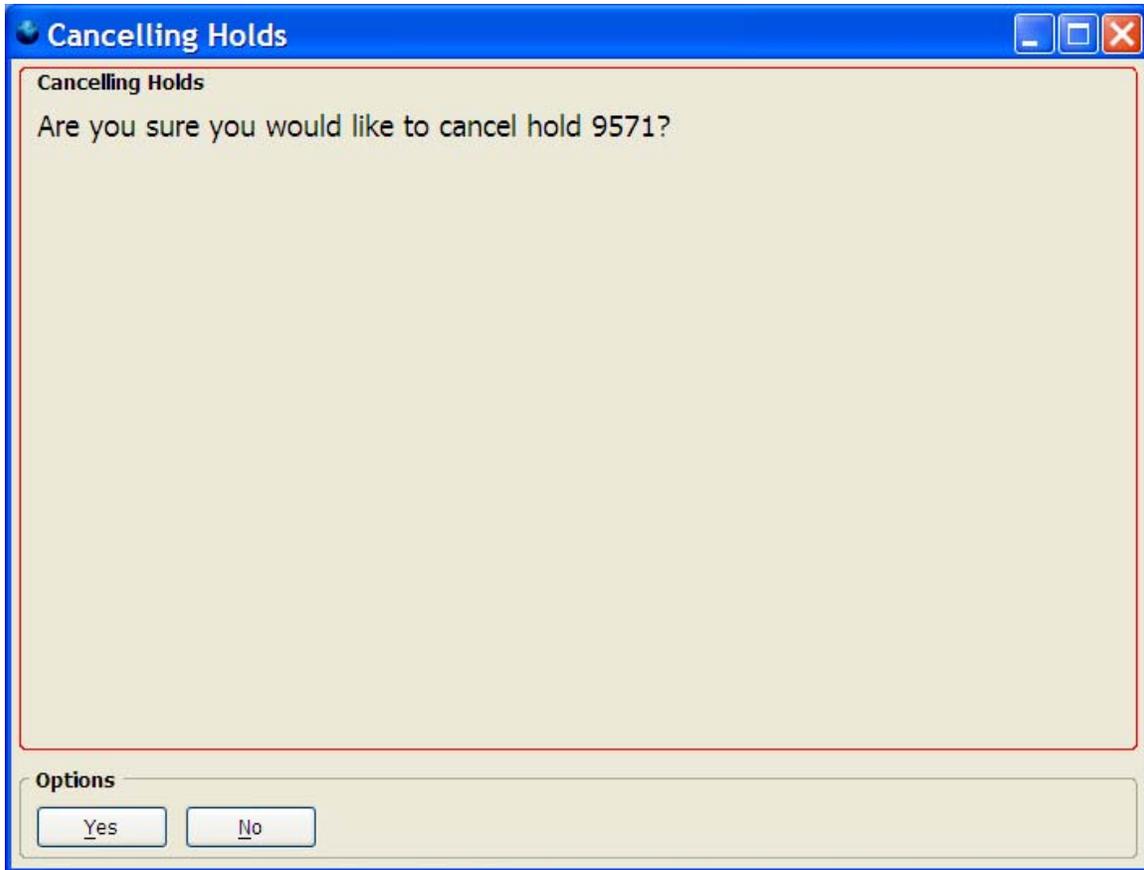
- Title:** Twilight : a novel
- Author:** Mosby, Katherine
- TCN: (OCLC):** ocm56807811
- Created By: (EG-IN):** 101010101010101
- Edition:** 1st ed.
- Last Edited By: (EG-IN):** 101010101010101
- Pub Date:** c2005
- Last Edited On:** 08/24/08

Below the record summary is a "Holds" section with a table. A context menu is open over the table, showing the following options:

- Show Notices
- Edit Pickup Library
- Edit Phone Notification
- Set Email Notification
- Edit Activation Date
- Activate Hold
- Suspend Hold
- Mark Item Damaged
- Mark Item Missing
- Find Another Target
- Cancel Hold

Available...	Capture D...	Current C...	Last Notify Ti...	Noti...	Patron Barc...	Pickup Lib	Rec
		375000024...		0	273230	MVPLM	2008
		373230015...		0	273230	MVPLM	2008
2008-10-23	2008-10-23	373230016...		0	273230	MVPLM	2008
2008-09-09	2008-09-09	373230016...		0	273230	MVPLM	2008
		117644-6002		0	275000	JCPLS	2008
2008-10-22	2008-10-22	375000030...	2008-10-22T1...	1	275000	JCPLS	2008
		117644-4002		0	275000	JCPLC	2008
2008-10-15	2008-10-15	375000030...		0	275000	JCPLS	2008
2008-10-18	2008-10-18	375000030...		0	275000	JCPLC	2008
2008-10-03	2008-10-03	341940007...		0	241940	UCPLB	2008
	2008-10-22	339460016...		0	212080	PLFDP	2008

A Window will open asking if you are sure you wish to cancel the hold:



If it is the correct hold, click **Yes (Alt + Y)**. The window will close, and the hold will disappear from the list.

### ***Retargeting Holds***

Holds need to be retargeted whenever a new item is added to a record, or after some types of item status changes, for instance when an item is changed from On Order to In Process. The system does not automatically recognize the newly added items as available to fill holds. This also needs to be done if items marked as Damaged or Missing or set to other non-circulating statuses are once again made available for circulation.

First, view the holds. See ***Viewing Holds***, on page 21.1, if needed. Then, highlight all the holds for the record, except any holds which are In Transit. Holds In Transit do not need to be retargeted, and cannot be without an override.

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The screenshot shows a web browser window with the URL `1: hm-cat1@HMMPL-laptop1.evergreen.lib.in.us`. The browser's address bar contains the URL. The page title is "1 Bib Record: ocm56807811 | 2 Bib Record: ocn123118933". The main content area is titled "Record Summary" and displays the following information:

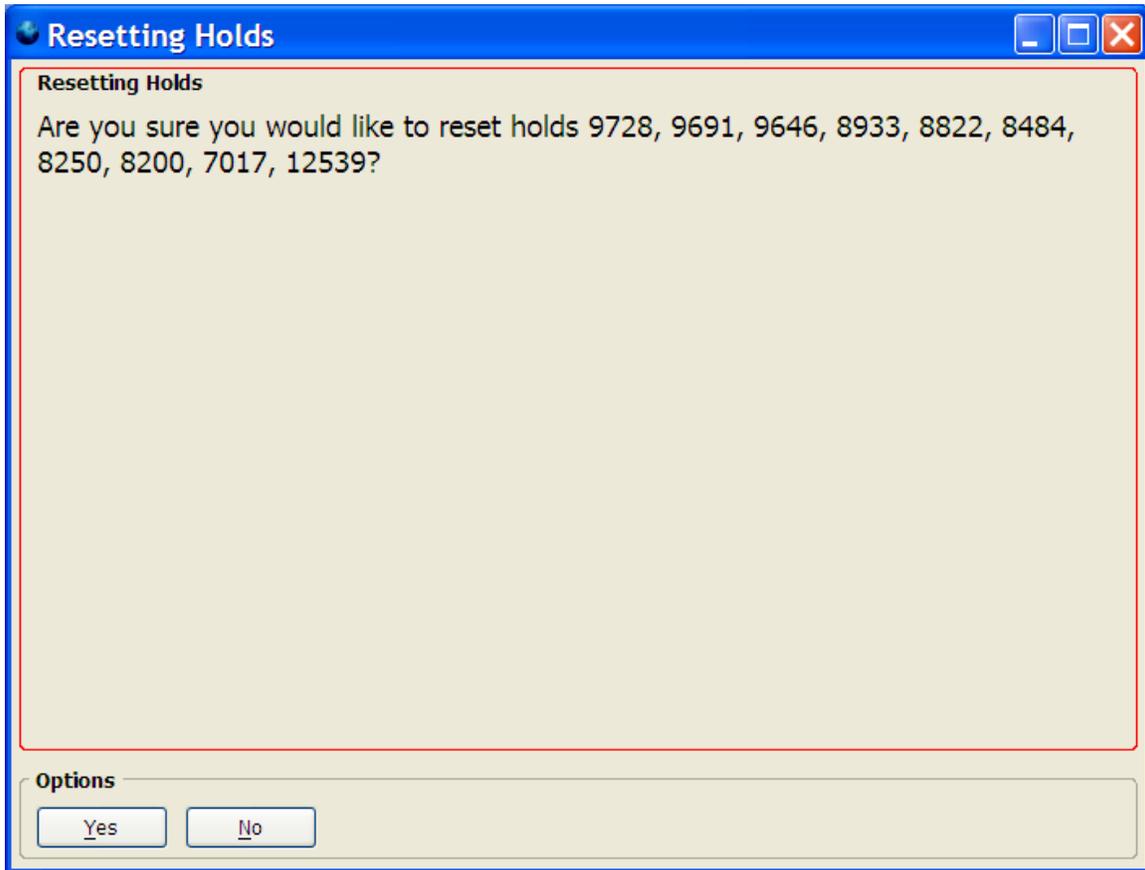
- Title:** Twilight : a novel
- Author:** Mosby, Katherine
- TCN: (OCLC):** ocm56807811
- Created By: (EG-IN):** 101010101010101
- Edition:** 1st ed.
- Last Edited By: (EG-IN):** 101010101010101
- Pub Date:** c2005
- Last Edited On:** 08/24/08

Below the record summary is a "Holds" section with a table of holds. The table has the following columns: Available..., Capture D..., Current C..., Last ..., Notices, Patron Barcode, Pickup Lib, and Req. The table contains several rows of hold data. A context menu is open over the table, titled "Actions for Selected Holds". The menu items are:

- Show Notices
- Edit Pickup Library
- Edit Phone Notification
- Set Email Notification
- Edit Activation Date
- Activate Hold
- Suspend Hold
- Mark Item Damaged
- Mark Item Missing
- Find Another Target
- Cancel Hold

Under **Actions for Selected Holds (Alt + S)** select **Find Another Target (Alt + T)**

A window will open asking if you are sure you would like to reset the holds for these items.



Click **Yes (Alt + Y)**. Nothing will appear to happen, but the system will now recognize the new items and items with a new status as available for holds.