



# Understanding Holds

# Understanding Holds

- There are four types of holds in Evergreen Indiana. Holds may be placed by library staff via the Staff Client or by patrons via the OPAC. A patron may have up to 20 unfilled holds in the system at one time.
- User group profile, circulation modifier, age protection and the pick-up location designation may affect the ability of a patron to place a hold. Attempts to place improper holds will generate this pop-up customer service message:



# How holds are filled!

- Items are captured to fill holds based on proximity. The system seeks to minimize transit time by capturing the item and assigning it to the nearest patron on the hold list. The nearest patron may not be person who has been on the hold list the longest. The system will continue to seek to fill holds with other items.

# Minimizing Transits

- For example, Sally places a hold on December 1; John places a hold on December 10; and Dewey places a hold on December 15.
- Sally and John have designated Thorntown as the pick-up location. Dewey designated Westfield as the pick-up location.
- On December 20, a patron at Westfield returns the item. The item is captured for Dewey even though he placed hold at a later date because the item will not need to transit to fill the hold. The system will continue to search to find items to fill the hold requests for Sally and John.

# Then fulfilling the oldest hold

- For example, Sally places a hold on December 1; John places a hold on December 10; and Dewey places a hold on December 15.
- Sally and John have designated Thorntown as the pick-up location. Dewey designated Westfield as the pick-up location.
- On December 20, a patron at Mooresville returns the item. The item is captured for Sally and will be transited to Thorntown. The system will continue to search to find items to fill the hold requests for John and Dewey.

# User Groups and Holds

A patron's user profile group determines the scope of the patron's ability to place holds.

- Residents, non-residents, PLAC, outreach, temp and staff user profiles have full access to the consortium and may place holds on any library's materials.
- Reciprocal borrowers and student profiles have access only to the member library that issued the library card. Reciprocal borrowers and student user groups may place holds only on the materials owned by the library that issued the library card.

# Items that do not Transit

- Items with the following general circ modifiers do not transit between the libraries: art, dvds and videos, cd-music, equipment, media, realia, software gaming and special collections.
- Evergreen will deny an attempt by a patron to place a hold on an item that does not transit if filling the hold would cause the item to transit to another library.
- The staff client will override this—so staff need to be aware of the consortium rules that only books, audiobooks, kits and magazines can be transited.
- Patrons may place a hold and pick up an item from the owning library.

# Patron Types and Holds

- Circulation modifiers determine “who” may place a hold. Although local library patrons may place holds on items owned by the local library, consortium patrons may not place holds on those items with circulation modifiers that do not transit.
- There is one exception: matching the pick-up library to the owning library when placing the hold will allow the hold to be placed.

# Patron holds on DVDs to transit

- Example One: Adams Library owns “Snow Bear” on dvd. Adams Library’s local patrons may place a hold on this item. A hold by a Kendallville Library patron on the dvd with the selection of Kendallville as the destination pick-up library will be denied by Evergreen because the hold would cause the item to transit.

# Patron holds on DVDs for pick-up

- Example Two: Adams Library owns “Snow Bear” on dvd. A Kendallville Library patron places a hold and designates Adams Library as the pick-up library. This hold will be allowed because the filling the hold does not require the item to transit. The patron is assured the item will be available when she arrives to pick it up. The patron is allowed to return the dvd to any member library to transit back to Adams Library.

# Age Protection and Holds

- Six-month age protection of new items prevents holds from being filled for other than local patrons. The hold shows as accepted/placed, but the hold will not be filled for the non-local patron until the item's age protection has expired.
- If the patron's home library purchases the item and also age protects it, the patron's hold can be filled by his home library.
- This is why it is in the best interest of the patrons to only place holds at the Title level\*—not the copy level.

\*Hold levels are explained in the next section

# The Four Types of Holds

- Evergreen has four different types (levels) of holds. Library staff may place holds at all four levels. Patrons may place only meta-record and title level holds. The chart below summarizes the differences among the hold types:

Hold Type	Abbreviation	When to Use	How to Use	Who Can Place	Hold Captures
Meta-record	M	Format type doesn't matter	Click on "Place Hold" next to the title. On the holds confirmation screen, click "Advanced Hold Options" and select "Other Applicable Formats"	Patron or staff	All items on MARC records sharing the same title (book, video, audiobook, etc.) regardless of format.
Title	T	Patron wants the first available copy of the title	Staff or patron click "Place Hold" next to title	Patron or staff	All holdings attached to a single MARC (title) record.
Volume	V	Patron wants a specific volume attached to a particular call number.	Click "Place Hold" on any items shown in holdings list, next to the call number.	Staff	Call number specific volume record (note: call number is in the volume record)
Copy	C	Patron wants a specific copy of an item.	Click "details" to view barcode then place hold on button next to barcode	Staff	Item based on barcode.

# Step 1: Title Level Holds

- To place a “title level” hold that will capture all holdings attached to a single MARC record, search and retrieve the record in the catalog.
- Step 1: Click “Place Hold” button next to the title on the search results list

Results 1- 6 of about 6 (page 1 of 1)

Home  
Advanced Search  
My Account  
Log out  
You are logged in as **isltest**

My Title Results

Relevant Subjects  
Friendship  
Teenage girls  
New York (State)  
Large type books

Relevant Authors  
Moore, Lorrie.

Who will run the frog hospital?  
Moore, Lorrie.  
| 1995 Chivers Press| large print 192 p. (large print) ; 22 cm.  
Place Hold

Who will run the frog hospital? a novel  
Moore, Lorrie.  
| 1994 A.A. Knopf| print [148] p.  
Place Hold

Who will run the frog hospital? a novel  
Moore, Lorrie.  
1st edition| 1994 Knopf| print 147 p. ; 22 cm.  
Place Hold

Who will run the frog hospital? a novel  
Moore, Lorrie.

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# Step 1: Title Level Holds (cont.)

- or click “Place Hold” button on the title summary screen.

Result 1- 6 >> End

Record Summary 

Title	Who will run the frog hospital? a novel
Author	Moore, Lorrie.
ISBN	0679434828
Edition	1st edition
Publication Date	1994
Publisher	Knopf
Physical Description	print 147 p. ; 22 cm.
Format	 text
Abstract	

Copy Summary Shelf Browser Reviews MARC Record

Library	Callnumber	Copy Location	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order	Reference
<b>Fulton County Public Library</b>											

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# Step 2: Title Level Holds

- Step 2: Patron logs into account, if not already in “My Account” feature. Fill in patron name and password.

EVERGREEN INDIANA  
OPEN SOURCE INTEGRATED LIBRARY SYSTEM  
Evergreen Indiana

ho will run the frog hospital Search

Home  
Advanced Search  
My Account  
Log in  
My Title Results  
My Title Details

**Login**

Enter your username or library barcode

Password

Login Cancel

# Step 3: Title Level Holds

- Step 3: Edit patron's hold notification options, contact information, expiration date and pickup location fields. Click the "Place Hold" button. Confirm action on the pop-up window.

Create / Edit a Hold	
Recipient:	Lot, Reads
Title:	Who will run the frog hospital? a novel
Author	Moore, Lorrie.
Format	
Physical Description:	print 147 p. ; 22 cm.
Contact telephone number:	<input type="text" value="675-765-7676"/> (xxx-yyy-zzzz)
Enable phone notifications for this hold?	<input checked="" type="checkbox"/>
Contact email address:	<input type="text" value="clemmer@library.in.gov"/>
Enable email notifications for this hold?	<input checked="" type="checkbox"/>
Pickup location	<input type="text" value="Evergreen Indiana"/>
Expiration date	<input type="text"/>
Suspend this hold <a href="#">(Help)</a>	<input type="checkbox"/>
Advanced Hold Options	
<input type="button" value="Place Hold"/> <input type="button" value="Cancel"/>	

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# Step 1: Meta-record Level Holds

- To place a “meta-level” hold that will capture all items that share the same title regardless of format, search and retrieve the record in the catalog.
- Step 1: Click “Place Hold” button next to the title on the search results list.

Results 1- 6 of about 6 (page 1 of 1)

as istest

te)  
oks

Who will run the frog hospital?  
Moore, Lorrie.  
| 1995 Chivers Press| large print 192 p. (large print) ; 22 cm.  
Place Hold

Who will run the frog hospital? a novel  
Moore, Lorrie.  
| 1994 A.A. Knopf| print [148] p.  
Place Hold

Who will run the frog hospital? a novel  
Moore, Lorrie.  
1st edition| 1994 Knopf| print 147 p. ; 22 cm.  
Place Hold

# Step 1: Meta-record Level Holds (cont.)

- Or click “Place Hold” button on the title summary screen.

Unit 1 - b >> Eng

Record Summary 

Title	Who will run the frog hospital? a novel
Author	Moore, Lorrie.
ISBN	0679434828
Edition	1st edition
Publication Date	1994
Publisher	Knopf
Physical Description	print 147 p. ; 22 cm.
Format	 text
Abstract	

Copy Summary   Shelf Browser   Reviews   MARC Record

Library	Callnumber	Copy Location	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order	Reference
<b>Wilton County Public Library</b>											
Douglas	MOO	Ya/teen Fiction	Copy Details Browse Call Numbers	1	0	0	0	0	0	0	0
<b>Witchell Community Public Library</b>											
Witchell Community Public Library - Witchell	FIC MOO	Fiction	Copy Details Browse Call Numbers	1	0	0	0	0	0	0	0

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# Step 2: Meta-record Level Holds

- Step 2: Log patron into account, if not already in “My Account” feature.

EVERGREEN INDIANA  
OPEN SOURCE INTEGRATED LIBRARY SYSTEM  
Evergreen Indiana

ho will run the frog hospital Search

Home  
Advanced Search  
My Account  
Log in  
My Title Results  
My Title Details

**Login**

Enter your username or library barcode

Password

Login Cancel

# Step 3: Meta-record Level Holds

- Step 3: Edit patron's hold notification options, contact, information, expiration date and pickup location fields. Click the "Advanced Hold Options" button. Select acceptable formats and click "Place Hold" button. Confirm action on the pop-up window.

The screenshot shows a web form titled "Create / Edit a Hold" with the following fields and values:

Recipient:	Lot, Reads
Title:	Who will run the frog hospital?
Author:	Moore, Lorrie.
Format:	
Physical Description:	large print 192 p. (large print) ; 22 cm.
Contact telephone number:	<input type="text" value="675-765-7676"/> (xxx-yyy-zzzz)
Enable phone notifications for this hold?	<input checked="" type="checkbox"/>
Contact email address:	<input type="text" value="demmer@library.in.gov"/>
Enable email notifications for this hold?	<input checked="" type="checkbox"/>
Pickup location:	<input type="text" value="Evergreen Indiana"/>
Expiration date:	<input type="text"/>
Suspend this hold <a href="#">(Help)</a>	<input type="checkbox"/>

Below the form, there is a section for "Advanced Hold Options" which includes:

- A link: [Acceptable Alternative Formats: \(Help\)](#) (control-click to select multiple formats)
- A dropdown menu showing: Books, Large Print Books, Audiobooks, Video Recordings
- Buttons:  and

Red circles in the original image highlight the following elements:

- The contact telephone number field (675-765-7676)
- The contact email address field (demmer@library.in.gov)
- The pickup location field (Evergreen Indiana)
- The "Advanced Hold Options" button
- The "Acceptable Alternative Formats" link
- The "Place Hold" button
- The "Large Print Books" option in the format dropdown

# Volume Level Holds

- Volume level holds may be placed only by library staff. Volume level holds capture a specific call number.
- Staff may wish to place a volume level hold for the following case: a patron wishes to a specific volume of a circulating three part set of materials. For example, Adams Public Library System owns a 3 part set of North American Treaties. All three volumes are on the same catalog record. Selecting the item wanted by “call number,” in this case “PR 949.5689 vol III” will ensure the patron gets the proper item.

# Step 1: Volume Level Holds

- Step 1: From the staff client, search, retrieve and display the catalog record. (If not displayed, click “View Copy Information for all libraries” to display all.)

Record Summary
[Place Hold](#)

Title	Who will run the frog hospital? : a novel / by Lorrie Moore.
Author	Moore, Lorrie.
ISBN	0679434828
Edition	1st edition
Publication Date	1994
Publisher	Knopf
Physical Description	print 147 p. ; 22 cm.
Format	text
Abstract	
Subjects	Teenage girls -- New York (State) -- Fiction. Friendship -- New York (State) -- Fiction.

Copy Summary
Shelf Browser
Reviews
MARC Record

View copy information for all libraries

Library	Callnumber	Copy Location	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On
<b>Fulton County Public Library</b>										
Rochester	MOO	Ya/teen Fiction	<a href="#">Copy Details</a> <a href="#">Browse Call Numbers</a> <a href="#">Place Hold</a>	1	0	0	0	0	0	

# Step 2: Volume Level Holds

- Step 2. Click "Place Hold" under "Actions" for the desired volume record.

Record Summary [Place Hold](#) [More](#)

Title	Who will run the frog hospital? : a novel / by Lorrie Moore.
Author	Moore, Lorrie.
ISBN	0679434828
Edition	1st edition
Publication Date	1994
Publisher	<noop>
Physical Description	print 147 p. ; 22 cm.
Format	 text
Abstract	
Subjects	Teenage girls -- New York (State) -- Fiction. Friendship -- New York (State) -- Fiction.

[Copy Summary](#) [Shelf Browser](#) [Reviews](#) [MARC Record](#)

**View Copy Information for this location only**

Library	Callnumber	Copy Location	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order
<b>Fulton County Public Library</b>										
Rochester	MCO	Ya/teen Fiction	<a href="#">Copy Details</a> <a href="#">Browse Call Numbers</a> <a href="#">Place Hold</a>	1	0	0	0	0	0	0
<b>Mitchell Community Public Library</b>										
Mitchell Community Public Library - Mitchell	FIC MCO	Fiction	<a href="#">Copy Details</a> <a href="#">Browse Call Numbers</a> <a href="#">Place Hold</a>	1	0	0	0	0	0	0
<b>Noble County Public Library</b>										

# Step 3: Volume Level Holds

- Step 3: Scan or type patron's barcode into "Enter recipient barcode" then click "Submit."

Text Size: Regular / Large | Language:

keyword:who will run the frog hospital  Keyword

Enter recipient barcode:

# Step 4: Volume Level Holds

- Step 4: Edit patron hold notification fields and click “Place Hold”. Note the hold is identified “Volume Level Hold”.

Create / Edit a Hold	
Recipient:	Lot, Reads
Title:	Who will run the frog hospital? a novel
Author	Moore, Lorrie.
Format	 text
Physical Description:	print 147 p. ; 22 cm.
Call Number:	<b>MOO</b>
Hold Type:	<b>Volume Hold</b>
Contact telephone number:	<input type="text" value="675-765-7676"/> (000-YYY-ZZZZ)
Enable phone notifications for this hold?	<input type="checkbox"/>
Contact email address:	clemmer@library.in.gov
Enable email notifications for this hold?	<input checked="" type="checkbox"/>
Pickup location	<input type="text" value="Evergreen Indiana"/>
Expiration date	<input type="text"/>
Suspend this hold <a href="#">(Help)</a>	<input type="checkbox"/>
<input type="button" value="Place Hold"/> <input type="button" value="Cancel"/>	

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# Copy Level Hold

- Copy level holds may be placed only by library staff. Copy level holds capture a specific barcode number.
- Copy level holds would be used if a patron needed a specific issue of a magazine, or a specific date range of a travel guide, like Fodor's or Frommer's.

# Step 1: Copy Level Holds

- Step 1: From the staff client, search, retrieve and display the catalog record. (If not displayed, click “View Copy Information for all libraries” to display all.)

Record Summary		<a href="#">Place Hold</a>
Title	Who will run the frog hospital? : a novel / by Lorrie Moore.	
Author	Moore, Lorrie.	
ISBN	0679434828	
Edition	1st edition	
Publication Date	1994	
Publisher	Knopf	
Physical Description	print 147 p. ; 22 cm.	
Format	 text	
Abstract		
Subjects	Teenage girls -- New York (State) -- Fiction. Friendship -- New York (State) -- Fiction.	

<a href="#">Copy Summary</a>	<a href="#">Shelf Browser</a>	<a href="#">Reviews</a>	<a href="#">MARC Record</a>	<b><a href="#">View copy information for all libraries</a></b>						
Library	Callnumber	Copy Location	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order
<b>Fulton County Public Library</b>										
Rochester	MOO	Ya/teen Fiction	<a href="#">Copy Details</a> <a href="#">Browse Call Numbers</a> <a href="#">Place Hold</a>	1	0	0	0	0	0	0

# Step 2: Copy Level Holds

- Step 2. Click “Copy Details” under “Actions” for the desired record.

Record Summary		<a href="#">Place Hold</a>	<a href="#">More A...</a>
Title	Who will run the frog hospital? : a novel / by Lorrie Moore. Who will run the frog hospital? a novel		
Author	Moore, Lorrie.		
ISBN	0679434828		
Edition	1st edition		
Publication Date	1994		
Publisher	Knopf		
Physical Description	print 147 p. ; 22 cm.		
Format	 text		
Abstract			
Subjects	Teenage girls -- New York (State) -- Fiction. Friendship -- New York (State) -- Fiction.		

<a href="#">Copy Summary</a>	<a href="#">Shelf Browser</a>	<a href="#">Reviews</a>	<a href="#">MARC Record</a>
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**View Copy Information for this location only**

Library	Callnumber	Copy Location	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order
<b>Fulton County Public Library</b>										
Rochester	MOO	Ya/teen Fiction	<a href="#">Copy Details</a> <a href="#">Browse Call Numbers</a> <a href="#">Place Hold</a>	1	0	0	0	0	0	0
<b>Mitchell Community Public Library</b>										
Mitchell Community Public Library - Mitchell	FIC MOO	Fiction	<a href="#">Copy Details</a> <a href="#">Browse Call Numbers</a>	1	0	0	0	0	0	0

# Step 3: Copy Level Holds

- Step 3. Click "Place Hold" beside the barcode. The hold will be for this copy.

## Fulton County Public Library

Record Summary
[Place Hold](#)
[More](#)

Title	Who will run the frog hospital? : a novel / by Lorrie Moore. Who will run the frog hospital? a novel
Author	Moore, Lorrie.
ISBN	0679434828
Edition	1st edition
Publication Date	1994
Publisher	Knopf
Physical Description	print 147 p. ; 22 cm.
Format	text
Abstract	
Subjects	Teenage girls -- New York (State) -- Fiction. Friendship -- New York (State) -- Fiction.

[Copy Summary](#)
[Shelf Browser](#)
[Reviews](#)
[MARC Record](#)

**View copy information for all libraries**

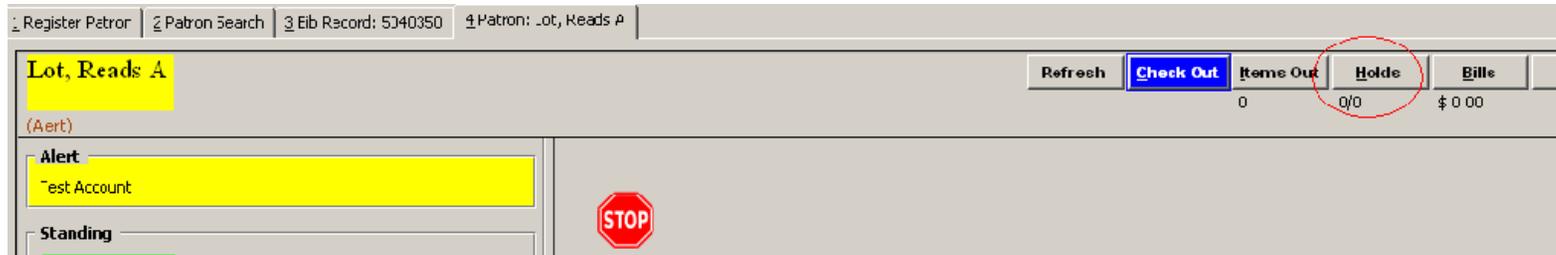
Library	Callnumber	Copy Location	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order
<b>Fulton County Public Library</b>										
Rochester	MOO	Ya/teen Fiction	<a href="#">Copy Details</a> <a href="#">Browse Call Numbers</a> <a href="#">Place Hold</a>	1	0	0	0	0	0	0

[print these details](#)

Barcode	Status	Location	Age Hold Protection	Create Date	Holdable	Due Date
33187000920252 <a href="#">more info</a> <a href="#">place hold</a>	Available	Ya/teen Fiction	6month	1994-11-21	Yes	

# Placing Holds From Patron Record

- Holds can be placed directly from a patron record.
- Step 1. On patron record screen, click “Holds” to bring up holds screen.



- Step 2. On “holds screen,” click the “Place Hold” button:



# Placing Holds From Patron Record

- Step 3. The catalog is displayed in Holds screen; enter search terms and submit search.

The screenshot displays the Evergreen Indiana library system interface. At the top, there are navigation buttons: Refresh, Check Out, Items Out, Holds (highlighted in blue), Bills, and Edit. Below these, the user's account information is shown, including the name 'Reads A' and a balance of \$ 0.00. The main content area is divided into several sections:

- Account Information:** Shows the user's name, account number, and various statistics such as 'Available', 'Outs', 'Overdue', and 'Returned'.
- Navigation:** Includes links for Home, Advanced Search, and My Account.
- Quick Search:** A section for entering ISBNs and submitting a search.
- MARC Expert Search:** A section for entering tags and subfields.
- Search Input:** A central area for entering search terms. It features three rows of search boxes, each with a 'Keyword' dropdown and a 'Contains' dropdown. The first row contains the text 'will run frog hospita'. Below the search boxes are buttons for 'Reset Form', 'Add Search Row', and 'Submit Search'.
- Search Filters:** A sidebar on the right containing various filters such as Item Form, Item Type, Literary Form, Language, Audience, Bib Level, and Publication Year.
- Sort Criteria and Search Library:** A section for selecting sort criteria (e.g., Relevance, Ascending / A to Z) and choosing a library to search (e.g., Evergreen Indiana).

# Placing Holds From Patron Record

- Step 4. Click “Place Hold” button at the appropriate place for the type of hold you wish to place for the patron.
- Step 5. The patron’s account is automatically retrieved. As usual, edit patron’s hold notification options, contact information, expiration date and pickup location fields. Click the “Place Hold” button and confirm the action in the pop-up window.
- Step 6. Staff may continue to search for additional titles or if finished, click the “Holds” button on top to go back to the “Holds” screen. Click “Refresh” to view the recently placed hold.