



## SIERRA CIRCULATION

### Set up Holds

---

#### Holds Design Overview

Innovative provides many holds features in order for libraries to meet local needs. Library staff must consider a variety of questions when designing the library holds configuration. Some of these questions are listed below.

- If the library system has multiple members, branches, or libraries, do these members, branches, or libraries share resources? If yes, is the resource sharing 'weighted'?
- Does the library wish to manage delivery resources in specific ways involving item pickup locations?
- Does the library have special needs for delivery of materials?
- Will the library page items?

**NOTE:** A page is a printed notification to a staff member that a user has requested an item on shelf in the library.

- Will the library allow patron-placed holds?
- Does the library wish to do recalls?
- What other hold limits might the library choose to apply?

#### Title Priority Paging

Title Priority Paging, or Priority Paging, is Innovative's standard holds set-up. It is designed to meet the needs of multi-branch or multi-department libraries that share materials. Title Priority Paging is also appropriate for single branch libraries, as it allows library staff to page within the building and to fill holds with any item. Paging lists are queued dynamically and may be printed as often as necessary. Library staff use these lists for retrieval of available materials that have been requested. The order in which libraries are paged follows the parameters set up by library staff.

Priority Paging applies to holds placed in Sierra and WebPAC. A title level hold generates a search for locations with available items. The order in which each library is paged is determined by the hold pickup location. Material will always page at the pickup location first and then all other libraries in the order designated by that pickup location. Pages not satisfied at one library move on to the next library after an interval specified by the library system. When a paged copy is checked in, it is either placed on the holdshelf or set in-transit to the holdshelf location. At any time during the paging process, an available copy, even if it's not at a paged location, may satisfy the hold upon check-in.

For libraries that do not wish to page for available materials, the step of printing pages may be skipped. Holds remain on the title level and can be satisfied by any copy checked in.

In the WebPAC, holds placed on volumes will prompt the user to choose the desired volume. This results in an item level page. Because of this, libraries should print item paging slips/lists in addition to title paging lists every day.

The following is a list of features that can be used with Priority Paging:

**Filling holds: Preference to owning library**

- Give Precedence to Local Holds
- Sending Items Home

**Designating pickup at the item's location**

- Pickup at Item Location
- Item Home Pickup

**Recalls with Title Holds**

- Title Level Recalls

**Paging options**

- Keeping the Title Hold after the Page Expires
- Paging Open Locations First
- Cycling through the Title Paging List Multiple Times
- Prioritizing Hold Fulfillment at the Pickup Locations
- Item Page List
- Display and Transfer of Paged Items
- Automated Transfer of Paged Items

**Holdshelf options**

- Clearing Holds Limited to the User's Branch
- Automatic Status Holdshelf and Multiple Location Holdshelf
- Charging Patrons for Unclaimed Holds
- Holdshelf Loan Rule Set by Pickup Location

**Delivery Options**

- Holds Mailing Labels
- Automatic Check-Out
- Held Item Delivery

**Limiting Access**

- Max Holds on Title
- Block Duplicate Holds

**If your library does not use Title Priority Paging.**

Libraries that are not using Title Priority Paging may make use of the following features. Title Priority Paging has prioritization, transfer of pages, and paging of items at the pickup location first built into the function. Many of the above features are also available to libraries not using Title Priority Paging. Consult the Holds Features and Compatibility Chart for functionality conflicts.

- Library Priority Table (Maintain Branch Request Order)
- Regional Holds (requires purchase of a separate product)
- Page Pickup Location First

## Holds Set-Up

Most libraries will set up holds during the library's implementation period. After implementation, the library may make changes, but staff should carefully consider all aspects of holds before making changes to the setup in place. Libraries that need to re-evaluate the local holds setup may use the following steps.

If the library has not previously used Title Priority Paging and would like to do so, contact Innovative.

**Recommendations for Setup**

- Document! Keep records of decisions made. Consult the Holds Features and Compatibility Chart to determine which features may be used together and which may not. Print the chart and highlight features you will use. Are there conflicts?
- Create a checklist to implement the steps in this document. As a step is completed, annotate and date it.
- Create a workflow or a decision tree for testing holds functionality. Know what features have been tested successfully.
- Keep a record of all changes to circulation parameters and holds features setups. Print tables when changes are made and annotate what was done and why. Print emails showing a decision to use or stop using a feature. Keep a record of requests for system settings changes sent to Innovative Interfaces. Will a new circulation supervisor be able to function with the records left by a predecessor?

**Set-up Steps**

1. Select the features that the library will use, making sure that any extra-cost products were purchased. (Contact sales@iii.com if you would like to purchase a product.) Note whether Innovative setup is required.
2. Enter pickup locations in the Hold Pickup Locations table. Enter the Paging Priority table element values. (A default value is already present for priority for all pickup locations. If the library does not wish to assign priority, additional values need not be entered. If the library does not page, the library can assign '0' (zero) for all pickup locations.)
3. Determine whether the library will keep title holds after a page expires.

4. Determine the text number to be used for holds cancelled as a result of not being filled by any library on the Priority Paging List. Innovative staff will need this number for the set-up process if the library is setting up Priority Paging for the first time.
5. Determine which holdshelf options the library wishes to use. These require Innovative setup.
6. Determine if the library will use title recalls. This requires Innovative setup.
7. Determine if the library will implement other optional hold limits. These require Innovative setup.
8. As part of Circulation Parameters setup, for every combination of patron type (PTYPE), item type (ITYPE), and item location, make sure a loan rule exists. For any given combination of item and patron, the library determines if the item will be holdable via the loan rule.
9. Enter appropriate settings into loan rules for holdable element, homepickup element, shipping elements, recall variables, time to pickup elements.

**NOTE:**

- At multi-member libraries where resources are not shared, it may be necessary to have paired loan rules, one allowing holds for some users and one denying holds to all other users.
  - If even one element in the loan rule hold elements differs for a given patron/item combination, a new loan rule will be required.
  - Remember that the minimum use will be used as the loan period where a library-specified number of holds exist.
10. Ensure that all required notices related to holds have been created, including drop hold notices. See also Printing Circulation Notices with Print Templates.
  11. Ensure that the notice text numbers have been entered into loan rule notice text elements.
  12. Determine the type of hold slips the library will use. If using custom hold slips, submit the Set up custom holds and transit slips service commitment.
  13. Determine the type of transit slips the library will use (if materials are going to be set in transit). If using custom transit slips, submit the Set up custom holds and transit slips service commitment.
  14. Provide settings for the following Circulation System Options:
    - Holds: Print hold cancel notice when canceling hold
    - Notices: Print recall fine
    - Notices: Print HOLD NOTE on hold pickup notices
    - Pageslips: Text #
    - Hold Cancel Notice: Not wanted after date past: Text #

**NOTE:** You may suppress the printing of any notice type not used at your library.

- Holds: Number of holds before minimum use used for due date
- Holds: Number of holds before purchase alert
- Holds: Streamline multiple holds for 1 patron
- Holds: Give precedence to local holds
- Holds: Allow multiple title-level holds for one patron
- Pageslips: Number of hours before page can be transferred
- Recalls: Authorization required to alter due date of recall
- Recalls: Start charging fine increment after TIME RETURN RECALL
- Recalls: Course reserves patron type for recalls
- Reserves: Allow hold cancel in reserve list maintenance?
- Priority Paging: Refuse Item Holds
- Holds/Bookings: Display Patron Name and/or Record Number
- Check-in: Check in bib hold at wrong location

15. Provide settings for the following Login Manager Holds Tab Options:

- Allow bib level holds on bibs with no items and no orders
- Allow bib level holds on bibs with only 1 attached item
- Show Hold Alert during receiving
- Limit pickup locations to those in the Hold Pickup Locations table

16. Determine if the Automated Clearing of In-Transit Status feature or, alternatively, the Automated Update of Items in Transit Too Long feature, is appropriate for your library.

17. Complete the steps for setting up patron-placed holds as per this resource : Requests in the WebPAC / Patron-Placed Holds

18. During the previous steps, the library has noted where Innovative setup is required for a particular feature. Verify that all Innovative setup has been completed.

19. Test the setup.

20. Once the library staff members are happy with the settings in place, ensure that all staff are familiar with procedures to keep holds functioning smoothly.

## Holds Features and Compatibility Chart

FEATURE	INNOVATIVE SETUP OR PRODUCT NEEDED	OTHER SETUP REQUIRED	LIMITATIONS
Automated Clearing of In-transit Status	Innovative Setup	Set the circulation option Check-in: Check-in at wrong location to ALLOWED or ASK.	Cannot be used with Automated Update of Items in Transit Too Long  Cannot be used with Floating Collections  Cannot be used with the Time to Reshelve an Item table.
Automated Display and Transfer of Paged Items	Innovative Setup	Circulation System Option: Number of hours before page can be transferred	n/a
Automated Update of Items in Transit Too Long	Innovative Setup	Add your library's designated new status code to the Fixed-Length Codes table before asking Innovative to enable this feature.	Cannot be used with Automated Clearing of In-transit Status
Automatic Check-Out	Innovative Setup	Patron Types (PTYPES)	Cannot be used with Held Item Delivery  Cannot be used with Holds Mailing Labels
Block Duplicate Holds	Innovative Setup	n/a	Cannot be used with Multiple Holds
Charging Patrons for Unclaimed Holds	Innovative Setup	n/a	n/a
Cycling Through the Paging List Multiple Times	Innovative Setup	n/a	Requires Title Priority Paging.
Held Item Delivery	Product 323	n/a	Cannot be used with Automatic Check-Out
Holds Mailing Labels	Innovative Setup	Locations Served	Cannot be used with Automatic Check-Out

Holdshelf Loan Rule Set by Pickup Location feature	Innovative Setup	n/a	n/a
Item Home Pickup	n/a	n/a	A combination of 'bib' and 'itemhome' in the REQUEST Web Option is not supported if the library is using item-level paging. (It is supported if the library uses Title Priority Paging.)
Item Page List	Innovative Setup	n/a	Cannot be used with Title Page List  (This feature may be used with Title Priority Paging.)
Item Request Circles	n/a	Locations Served	This feature may not be used with Batch Requesting.
Keeping the Title Hold after the Page Expires	Innovative Setup	n/a	Requires Title Priority Paging.
Library Priority (Maintain Branch Request) Table	Innovative Setup	Specific settings in the Opac Option "Requests : Which Item" or the "Request" Web Option	Cannot be used with Title Priority Paging  The Page Pickup Location First feature can override this feature.
Local Holds	n/a	n/a	n/a
Max Holds on Title	Innovative Setup	n/a	Cannot be used with Multiple Holds
Multiple Holds	n/a	n/a	Cannot be used with Library Priority Table  Cannot be used with Regional Holds  Cannot be used with Block Duplicate Holds

			Cannot be used with Max Holds on Title
Page Pickup Location First	Innovative Setup	n/a	<p>This feature overrides Library Priority Table.</p> <p>Regional Holds and Pickup at Item Location override this feature.</p> <p>REQUEST Web Option hold level must not be set as 'localavailableany', 'system', 'circle', or 'item'.</p> <p>Cannot be used with Title Priority Paging</p>
Paging Open Locations First	Innovative Setup	n/a	Requires Title Priority Paging.
Patron-placed Holds	Innovative Setup (if the library automatically processes holds)	n/a	A combination of "bib" and "itemhome" in the REQUEST Web Option is not supported if the library is using item-level paging. (It is supported if the library uses Title Priority Paging.)
Prioritizing Hold Fulfillment at the Pickup Location	Innovative Setup	n/a	Requires Title Priority Paging.
Regional (Consortial) Holds	Product 313M	Library Priority Table Locations Served PCODE/ICODE/AGENCY	<p>Cannot be used with Multiple Holds</p> <p>This feature overrides the Page Pickup Location First feature</p> <p>Cannot be used with Title Priority Paging</p>



<b>Sending Items Home</b>	<b>Innovative Setup</b>	<b>Locations Served</b>	<b>This feature overrides the Floating Collection product.</b>
<b>Title Level Recalls</b>	<b>Innovative Setup</b>	<b>n/a</b>	<b>n/a</b>
<b>Title Priority Paging</b>	<b>Innovative Setup</b>	<b>n/a</b>	<b>Cannot be used with Library Priority Table</b>  <b>Cannot be used with Regional Holds</b>  <b>Cannot be used with Page Pickup Location First</b>

This publication is supplied for the exclusive use of customers of Innovative Interfaces with the understanding that it shall not be shown or distributed to anyone outside of the customer's organization without the prior written permission of Innovative Interfaces. This publication may be copied only if the copies are for the exclusive use of staff members of libraries that have purchased the Innovative system.

© 2022, Innovative Interfaces, Inc.