

Evergreen Indiana - Holds

Professional Development Office
Indiana State Library

Intro to Holds in Evergreen

- The backbone of the holds system in Evergreen Indiana is patron-initiated holds.
- We call holds Transits, rather than ILL because they are patron-initiated.
- Upon checking in an item at your library, regardless of whether you own the item, your library receives the circulation stat.
- 5 main factors involved in placing holds
 - Patron Type, Circ Modifier, Item Status, 6-month age protection, Pickup library

#1: Patron Types

- A patron's user profile group determines the scope of the patron's ability to place holds.
- Full access to consortium
 - Residents, non-residents, PLAC, outreach, temp and staff
- Access to issuing library materials only
 - Reciprocal borrowers and student

*Computer Users may not place holds.

*Limited Access may not place holds on r-rated AV.



Patron Type Hold Messages

Place Hold

- Harry Potter and the chamber of secrets [text: lg. print] / J.K. Rowling ; illustrations by Mary Grandpré.
Hold was successfully placed

[Continue](#)

Place Hold

- Harry Potter and the deathly hallows / by J.K. Rowling ; illustrations by Mary GrandPré.
Hold was not successfully placed
Problem: *The patron's account has expired*

[Cancel](#)

#2: Circ Modifiers

- Items with the following circ modifiers do not fill holds that would cause them to transit:
 - art, bestseller no holds, dvds and videos, cd-music, equipment, media, realia, software gaming, special collections
- Patrons may place a hold, pick up an item from the owning library and return anywhere.

Circ Modifier Hold Messages

- Problem: This type of item is not permitted to transit within Evergreen Indiana.

Search the Catalog

All Formats Keyword in

Indiana State Library - Indianapolis [Advanced Search](#)

Place Hold

Record for testing purposes 2

Hold was not successfully placed

Problem: Problem: This type of item is not permitted to transit within Evergreen Indiana.

[Cancel](#)

#3: Item Status

- Holdable item status
 - Available, Checked Out, In Process, In Transit, On Holds Shelf, On Order, Reshelving
- Unholdable item status
 - Bindery, Cataloging, Damaged, Discard/Weed, ILL, Lost, Missing, Reference, Temporarily Unavailable

Item Status Hold Messages

- Holdable? No
- Problem: The system could not find any items to match this hold request.

LOCATION	CALL NUMBER	BARCODE	SHELVING LOCATION	AGE HOLD PROTECTION	CREATE DATE	HOLDABLE?	STATUS	<u>ANTICIPATED DUE DATE *</u>
Indiana State Library - Indianapolis	TEST VOLUME 1 (Text)	00000105472385	Stacks	6month	01/30/2013	Place on copy / volume	In process	-
Seymour Main Library	TEST VOLUME 2 (Text)	00000105472377	Fiction	None	01/30/2013	No	Bindery	-

Place Hold

Record for testing purposes 2

Hold was not successfully placed

Problem: The system could not find any items to match this hold request

[Cancel](#)

#4: 6-month age protection

- Applying 6-month age protection ensures that your new item will not leave your local library system to fill holds.
 - 6-month age protection wears off automatically and the item will begin filling opportunity-based holds right away.
 - Items can transit between branches during 6-month age protection.
 - If item is picked up at the owning library and dropped off at another library, it will transit back to the owning library.

6-month age protection – Staff Client side

Place Hold

Record for testing purposes 1



Hold was not successfully placed

Problem: All available copies are temporarily unavailable at your pickup library due to age protection. Items less than 6 months old cannot be transited outside of the owning library. Placing this hold could result in longer wait times.

You have permission to override some of the failed holds.
Click **Submit** to override and place your hold on the selected items.

Submit

[Cancel](#)

Place Hold



Record for testing purposes 1

Hold was successfully placed

[Continue](#)

Holds

[Place Hold](#)

[Show Cancelled Holds](#)

[Detail View](#)

Actions for Selected Holds

#	Available On	Capture Date	Current Copy	La...	Notices	Pickup Library	Request Date	Status	Title	Type
1			No Copy		0	ISLI	2013-01-30 11:5...	Waiting for copy	Record for te...	V

#5: Pickup Library

- Proximity
 - At item checkin, if there are any holds that the item can fill at the checkin library, they'll be filled before allowing the item to transit to fill holds at another library.
- Opportunity
 - If a library's item transits to another library, it will stay there as long as there are appropriate holds to fill in order to minimize transit expenses.

#5 Pickup Library- Proximity

Assume that all copies are unavailable until Jan. 6 when the copy is checked in at Thorntown PL.

Jan. 1: Judy places a hold with a pickup location of Lebanon PL.

Jan. 5: Jerry places a hold with a pickup location of Thorntown PL.

Jan. 6: Item is checked in at Thorntown PL.

Hold is filled for Jerry. System continues to look for Judy.

#5 Pickup Library - Opportunity

Assume that there is only one copy available in the consortium.

Jan. 1: Judy places a hold with a pickup location of Lebanon PL.			
Jan. 5: Item transits to Lebanon PL from Thorntown PL to fill Judy's hold.			
Jan. 24: Jerry places a hold with a pickup location of Lebanon PL.			
Jan. 26 Item is returned and is targeted for Jerry's hold at Lebanon PL.			

Placing a Hold

- Staff members should never place a hold with their staff account (localadmin, circ1, cat2, etc.)
- Rather, you may create a new patron account and place holds with that account.
 - Example: BOOKCLUB
- Designating someone to pickup a hold.

Hold in Staff Client

1 Bib Record: 5466293 2 Patron Search 3 Patron: BORGER, SHAUNA +

Record Summary ([Add Volumes](#)) ([View MARC](#))

Title: Harry Potter and the deathly hallows
Author: Rowling, J. K.
Bib Call #: PZ7.R79835Hak 2007b

Edition: Large print ed.
Pub Date: 2007

TCN: 5466293
Database ID: 5466293
Record Owner:

Created By: admin
Last Edited By: hm-cat1
Last Edited On: 2011-12-12 5:4 PM

Record 5 of 56 [Start](#) [Previous](#) [Next](#) [End](#) [Search Results](#)

[Go Back](#) [Reload](#) [Go Forward](#)

Actions for this Record
Debug [Print Page](#)


INSPIRE Indiana State Library Find a Library Near Me Help About Evergreen

Search the Catalog

All Formats Keyword in Indiana State Library - Indianapolis [Search](#) [Advanced Search](#)

[\[Click to Refine Your Original Search \]](#)

Recent searches + [Search Results](#) Showing Item 5 of 56 [Previous](#) [Next](#)



Harry Potter and the deathly hallows / by J.K. Rowling ; illustrations by Mary GrandPré.
[Rowling, J. K.](#) (Author). [GrandPré, Mary, ill.](#) (Added Author). [Rowling, J. K.](#) (Credited).

Available copies

- 6 copies at Evergreen Indiana. [\(Show\)](#)
- 1 copy at Indiana State Library. [\(Show\)](#)
- 1 copy at Indiana State Library - Indianapolis.

Current holds


0 current holds with 8 total copies.

[Place Hold](#)
[Add to my list](#)
[Print / Email](#)

LOCATION	CALL NUMBER	BARCODE	SHELVING LOCATION	AGE HOLD PROTECTION	CREATE DATE	HOLDABLE?	STATUS	ANTICIPATED DUE DATE *
Indiana State Library - Indianapolis	[16699] ISLM PZ7 .R79835 HAK 2007B (Text)	00000105054290	Talking Books Large Type	6month	08/16/2007	Place on copy / volume	Reshelving -	
Indiana State Library - Indianapolis	[16699] ISLM PZ7 .R79835 HAK 2007B (Text)	00000105055040	Talking Books Large Type	6month	09/26/2007	No	Lost	08/29/2011

Record details

Placing a hold in OPAC



EVERGREEN INDIANA
OPEN SOURCE INTEGRATED LIBRARY SYSTEM

Shauna Borger

0 Checked Out 0

INSPIRE Indiana State Library Find a Library Near Me Help About Evergreen

Search the Catalog

All Formats Title in

[Advanced Search](#)

Place Hold

The psychology of Harry Potter : an unauthorized examination of the boy who lived / edited by Neil Mulholland.

Pickup location:

Notify when hold is ready for pickup?

Yes, by Email
 Yes, by Phone

Phone Number:

Yes, by Text Messaging

Mobile carrier: Note: carrier charges may apply
Mobile number: Hint: use the full 10 digits of your phone #, no spaces, no dashes

Placing a hold in Staff Client

1 Bib Record: 5466293 2 Patron Search 3 Patron: BORGER, SHAUNA +

Record Summary ([Add Volumes](#)) ([View MARC](#))

Title: Harry Potter and the deathly hallows **Edition:** Large print ed. **TCN:** 5466293 **Created By:** admin
Author: Rowling, J. K. **Pub Date:** 2007 **Database ID:** 5466293 **Last Edited By:** hm-cat1
Bib Call #: PZ7.R79835Hak 2007b **Record Owner:** **Last Edited On:** 2011-12-12 5:4 PM

Start Previous Next End Search Results Actions for this Record
Go Back Reload Go Forward Debug Print Page

Place Hold

Place hold for patron by barcode:
 Place this hold for me (Shauna Borger)

Harry Potter and the deathly hallows / by J.K. Rowling ; illustrations by Mary GrandPré.

Pickup location:

Notify when hold is ready for pickup?

Yes, by Email
 Yes, by Phone

Phone Number:

Yes, by Text Messaging

Mobile carrier: Note: carrier charges may apply
Mobile number: Hint: use the full 10 digits of your phone #, no spaces, no dashes

Types of Holds

- Title hold
 - This hold can be placed by the patron or staff member.
 - It targets all copies attached to a title and attempts to fill the hold with the first one it finds available.

The screenshot shows the Evergreen Indiana library catalog interface. At the top, the logo for Evergreen Indiana is displayed, along with a status bar showing 0 Checked Out, 1 On Hold, 0 Ready for Pickup, and \$0.00 Fines. Below the logo, there are navigation links for IISPIRE, Indiana State Library, Find a Library Near Me, Help, and About Evergreen. The main search area is titled "Search the Catalog" and includes a search bar with the text "Harry Potter" entered. The search results are displayed in a table with two columns: "Personal Author" and "Topic Subject". The first result is "Harry Potter and the chamber of secrets" by Rowling, J. K. (Janice K.) 1995-. The second result is "Harry Potter and the goblet of fire" by Rowling, J. K. 2000. Both results show the call number, the number of copies available at Evergreen Indiana, and the number of copies available at Indiana State Library - Indianapolis. A red box highlights the "Place Hold" button for each result.

EVERGREEN INDIANA
OPEN SOURCE INTEGRATED LIBRARY SYSTEM

0 Checked Out 1 On Hold 0 Ready for Pickup \$0.00 Fines

IISPIRE Indiana State Library Find a Library Near Me Help About Evergreen

Search the Catalog

All Formats Harry Potter Series in Indiana State Library - Indianapolis Search



Advanced Search

Another Search Advanced Search Sort by Sort by Relevance Show More Details Limit to available items

Search Results Results 1 - 2 of 2 (page 1 of 1)

Personal Author	
Rowling, J. K. (Janice K.) 1955-	(1)
Rowling, J. K.	(1)


Topic Subject	
Wizards	(2)
Schools	(2)
Hogwarts School of Witchcraft and Wizardry (Imaginary place)	(2)

-  **Harry Potter and the chamber of secrets**
Rowling, J. K. 2000.
Call number: [13190] ISLM PZ7 .R79835 HAJ 2000
3 of 8 copies available at Evergreen Indiana.
0 of 1 copy available at Indiana State Library.
0 of 1 copy available at Indiana State Library - Indianapolis.
-  **Harry Potter and the goblet of fire**
Rowling, J. K. 2000.
Call number: [13717] ISLM PZ7 .R79835 HAL 2000B
10 of 10 copies available at Evergreen Indiana.
1 of 1 copy available at Indiana State Library.
1 of 1 copy available at Indiana State Library - Indianapolis.

Search Results Results 1 - 2 of 2 (page 1 of 1)

Types of Holds

- Volume hold
 - This hold can only be placed by staff members.
 - Think of this as the Call Number hold.
 - Ideal for targeting specific magazines or series items.



Harry Potter and the deathly hallows / by J.K. Rowling ; illustrations by Mary GrandPré.
[Rowling, J.K.](#) (Author), [GrandPré, Mary, ill.](#) (Added Author), [Rowling, J.K.](#) (Credited).

Available copies

- 8 copies at Evergreen Indiana. ([Show](#))
- 1 copy at Indiana State Library. ([Show](#))
- 1 copy at Indiana State Library - Indianapolis.

Current holds


0 current holds with 9 total copies.

[Place Hold](#)
[Add to my list](#)
[Print / Email](#)

LOCATION	CALL NUMBER	BARCODE	SHELVING LOCATION	AGE HOLD PROTECTION	CREATE DATE	HOLDABLE?	STATUS	ANTICIPATED DUE DATE
Indiana State Library - Indianapolis	[16699] ISLM PZ7 .R79835 HAK 2007B (Text)	00000105054290	Talking Books Large Type	6month	08/16/2007	Place on copy / volume	Available	-
Indiana State Library - Indianapolis	[16699] ISLM PZ7 .R79835 HAK 2007B (Text)	00000105055040	Talking Books Large Type	6month	09/26/2007	No	Lost	08/29/2011

Types of Holds

- Copy Hold
 - This hold can only be placed by staff members.
 - This type of hold can only be fulfilled with a specific item.



Harry Potter and the deathly hallows / by J.K. Rowling ; illustrations by Mary GrandPré.
[Rowling, J.K.](#) (Author), [GrandPré, Mary, ill.](#) (Added Author), [Rowling, J.K.](#) (Credited).

Available copies

- 8 copies at Evergreen Indiana. ([Show](#))
- 1 copy at Indiana State Library. ([Show](#))
- 1 copy at Indiana State Library - Indianapolis.

Current holds

0 current holds with 9 total copies.

[Place Hold](#)
[Add to my list](#)
[Print / Email](#)

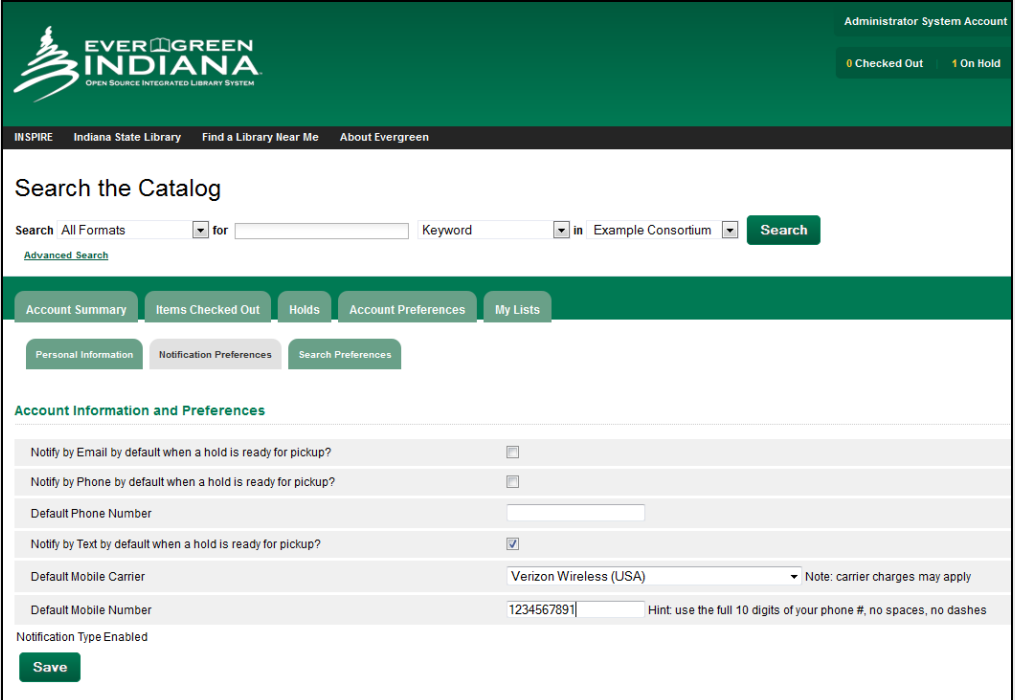
LOCATION	CALL NUMBER	BARCODE	SHELVING LOCATION	AGE HOLD PROTECTION	CREATE DATE	HOLDABLE?	STATUS	ANTICIPATED DUE DATE
Indiana State Library - Indianapolis	[16699] ISLM PZ7 .R79835 HAK 2007B (Text)	00000105054290	Talking Books Large Type	6month	08/16/2007	Place on copy / volume	Available	-
Indiana State Library - Indianapolis	[16699] ISLM PZ7 .R79835 HAK 2007B (Text)	00000105055040	Talking Books Large Type	6month	09/26/2007	No	Lost	08/29/2011

Transit Workflow

- Most libraries train several staff members to process transits.
- Print/Export the Holds List each morning and pull corresponding items.
- Items are checked in and a transit slip for each is printed.
- Items are packaged for transit so as to minimize wear-and-tear.
- InfoExpress label is created for each destination and taped into the InfoExpress bag's front pocket.
- Once the items transit to the circulating library, staff checks items in and puts on holds shelf.

Hold Notifications

- Patrons can choose to be notified that their hold is ready to be picked up in three different ways:
 - Phone
 - Email
 - Text Message



The screenshot shows the 'Account Information and Preferences' section of the Evergreen Indiana library system. The page is titled 'Administrator System Account' and shows '0 Checked Out' and '1 On Hold' items. The navigation bar includes 'INSPIRE', 'Indiana State Library', 'Find a Library Near Me', and 'About Evergreen'. The main content area is titled 'Search the Catalog' and includes a search bar with a dropdown for 'All Formats', a text input for 'for', a dropdown for 'Keyword', a dropdown for 'in Example Consortium', and a 'Search' button. Below the search bar are tabs for 'Account Summary', 'Items Checked Out', 'Holds', 'Account Preferences', and 'My Lists'. The 'Account Preferences' tab is selected, and the 'Notification Preferences' sub-tab is active. The 'Account Information and Preferences' section includes the following options:

Notify by Email by default when a hold is ready for pickup?	<input type="checkbox"/>
Notify by Phone by default when a hold is ready for pickup?	<input type="checkbox"/>
Default Phone Number	<input type="text"/>
Notify by Text by default when a hold is ready for pickup?	<input checked="" type="checkbox"/>
Default Mobile Carrier	Verizon Wireless (USA) <small>Note: carrier charges may apply</small>
Default Mobile Number	1234567891 <small>Hint: use the full 10 digits of your phone #, no spaces, no dashes</small>

Notification Type Enabled

Hold Notifications

System Account, Administrator

Refresh Check Out Items Out Holds Bills Edit Messages

(Maximum Bills) (Has Bills)
0 / 0/1 \$ 25.00

Status

Users
CONS
Internet Filtered
Account created on 3/19/12
Expires on 3/19/15
Last Activity 9/6/12
Last updated on 7/18/12

Holds: 1
Available: 0
Bills: \$ 25.00
Check Outs: 0
Overdue: 0
Long Overdue: 0
Claimed Returned: 0
Lost: 0
Non Cataloged: 0

ID and Contact Information

Library Card: [371c685c85c213ad362da9a5ac5a9901](#)
ID 1: Drivers License
 identification
ID 2:
Holds Alias:
Date of Birth: 1/22/79

Day Phone:
Evening Phone:
Other Phone:

OPAC Login: admin
Email:

Mailing Address
[\(Copy/Print\)](#)

Physical Address
[\(Copy/Print\)](#)

Reload Debug

Juvenile

Primary Identification Type: Drivers License

Primary Identification: identification

Parent/Guardian:

Email Address:

Daytime Phone: Example: 123-456-7890 or 123-456-7890 x123

Evening Phone: Example: 123-456-7890 or 123-456-7890 x123

Home Library: Example Consortium ⚠

Other Phone: Example: 123-456-7890 or 123-456-7890 x123

Main (Profile) Permission Group: ⚠

Privilege Expiration Date: 2015-03-19 Example: 1/31/1970

Internet Access Level: Filtered

Active:

Barred:

Is Group Lead Account:

Claims-returned Count: 0

Claims Never Checked Out Count: 0

Alert Message:

User Settings

Default Hold Pickup Location: Example Branch 1

Default Phone Number:

Default SMS/Text Number: 1234567891

Default SMS/Text Carrier: Verizon Wireless (USA)

Hold is behind Circ Desk:

Hold Notification Format: Phone: Email: SMS:

New Address

Save Save & Clone

[Show Only Required Fields](#)
[Show Suggested Fields](#)

Hold Notification - Phone

- Phone notification option
- They can enter their default phone number in their My Account but have the opportunity to change the number before placing the hold.
- Numbers should use the following standard:
1111111111 or 111-111-1111
- The recording begins as soon as the phone is answered.


Hold Notification - Email



- Email notification option
- It is a good idea to notify patrons from what email address the hold notice will be sent.

Example:

evergreen@evergreen.lib.in.u


S

Hold Notification 

 evergreen@evergreen.lib.in.us
to me 

2012-9-24

Indiana State Library - Indianapolis
315 W OHIO ST INDIANAPOLIS IN 46204

SHAUNA BORGER


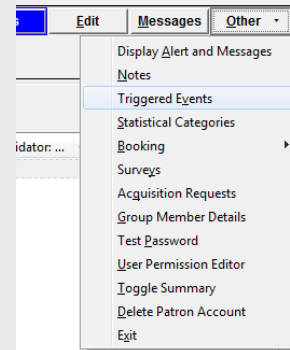
The item you requested is available for pickup from the Library. Contact the Circulation Desk to check out the item.

Title: Harry Potter and the chamber of secrets
Author: Rowling, J. K. (Janice K.)
Call Number: [13190] ISLM PZ7 .R79835 HAJ 2000
Copy Barcode: 00000105066062
Copy Number: 1

Thank you.

Hold Notification - Email

- What to do if your patron did not receive the email hold notification.
 - Check the spelling of their email address.
 - Check the Triggered Events in their account.
 - Ask them to check their spam folder.
 - Ask them to get in touch with their email provider and request that the domain evergreen.lib.in.us be white-listed.



Hold Notification – Text Message

- A patron can choose to be notified by text message that their hold is ready.
- They enter the number and provider in their My Account and confirm the information before they finalize the hold request.
- Charges for text messaging may be applied by cell phone provider.



Holds Issues

- Documenting holds issues
 - What type of permissions does the patron have?
 - Is the item circ modifier and 6 month age protection (optional) set correctly?
 - What is the status of the item? Could it have changed in the past 24 hours?
 - What pickup library was chosen?
- Old in-transit items

Hold's FAQ

- Patron did not receive the hold notification.
- Phone call did not include library name.
- Patron cannot log into My Account to place a hold.
- Patron requests holds history.
- Patron requests their number in the holds queue.
 - Anticipated Due Date
 - Average of 7 days to fulfill a hold
- If a patron has lost checkout privileges, can they still place a hold?

Resources

- Cataloging Manual, Chapter 21: Holds

http://www.in.gov/library/files/Cataloging_Training_Manual_Chapter_21.pdf

- Circulation Policy and Procedures

<http://www.in.gov/library/3382.htm>