

## View Holds

While most patron placed holds are filled as soon as possible, for many reasons, some holds can stall. These holds may need to be cancelled and replaced, perhaps on another bib record, in order for the patron to receive them. **OWLS recommends that all libraries work View Holds at least once a week. Holds on available items owned by your library should be checked every day.**

View Holds is a flexible reporting module, and can be used in many different ways. Here are some recommended ways to use it to find potentially problematic holds. Feel free to experiment with additional ways of using this reporting feature.

**Note:** The View Holds report is run at around 5 AM each morning and will not change until 5 AM the next day. Changes will be reflected in the next day's report.

### ***Holds on available items owned by your library***

If a patron places an item hold on one of your library's items, and that hold is not filled promptly, the hold will drop off the item paging list. Holds will also not re-appear on the item paging list once the item paging list has been cleared. For that reason, it's important to regularly check for stale holds on your library's items.

**OWLS recommends checking for available items owned by your library every day after filling the item paging list.**

The screenshot shows a web interface for viewing holds. On the left, under 'Limit Display To:', there is a search box containing '12 27 2006', a dropdown menu set to 'Status', and a text input field containing 'available'. On the right, under 'Pickup Location', there are radio buttons for 'Appleton', 'All', and 'Select Location', with 'All' selected. A 'View Outstanding Holds' button is located at the bottom center.

- Under **Limit Display to:** change the search criteria to **Status** and type “available” in the search box.
- Change the Pickup Location to **All**.
- Click the **View Outstanding Holds** button.
- Sort the list by location by clicking on the **Location** heading. The list will be sorted by the 3 to 5 character item location code. Scroll through the list until you find your libraries locations listed.
- Right-click on the title and choose **View Item** to make sure that the item status is still available. If it is, pull the item and check it to fulfill the hold. If the item is missing, change the status to missing.
- Depending on the item, either re-place the hold on an equivalent item or cancel the hold. When canceling a hold for an item that is no longer available, please be sure to choose the option to send a hold cancellation notice.

## ***Item level holds for pickup at your library***

### *Item level holds with available status*

- Under **Limit Display to:** change the search to **Status** and type “available” in the search box.
- Keep the **Pickup** Location at your library.
- Click the **View Outstanding Holds** button.
- Look at all the holds that were placed more than a week ago.
- Right-click on each item and select **View Item**.
- If the status still says available, contact the owning library to look for the item. They can then fulfill the hold, or change the status to missing if necessary.
- **Note:** If all libraries look at the holds on available items at their library every day, this step will not be necessary. Please contact the OWLS automation department if you feel a library is not looking at their holds on available items.

### *Old item level holds*

- Under **Limit Display to:** change the search to **Hold Status** and type “item hold with” in the search box.
- Keep the **Pickup** Location at your library.
- Click the **View Outstanding Holds** button.
- Sort the list by location by clicking on the **Date Placed** heading. (This is a toggle sort. The oldest ones will be first. Clicking on **Date Placed** again will sort the holds with the newest ones first.)
- Look at all of the holds over 1 month old.
- Right-click on each item and select **View Item**.
- Check the status of the item. If the item is long overdue, missing, discarded, in repair, billed, etc. you will need to cancel the patron’s hold and replace it.
- If you find an item hold that should be a title level hold, please cancel the item hold and replace it with a title level hold. If there is a queue, change the patron’s priority in the queue to its proper place based on their original hold date. Include a note that you replaced the hold and the date of the original hold.

## ***Title level holds for pickup at your library***

### *Title holds with no items attached*

- Under **Limit Display to:** change the search to **Hold Status** and type “bib hold, no attached” in the search box.
- Keep the **Pickup** Location at your library.
- Click the **View Outstanding Holds** button.
- Sort the list by location by clicking on the **Date Placed** heading.
- Look at all holds older than a month.
- Right-click on each item and select **View Bib**.
- Change the View to **Order**. If you see an order number, there is currently an order out for this item, and this hold is valid.

- Depending on the item, either re-place the hold on an equivalent item or cancel the hold. When canceling a hold for an item that is no longer available, please be sure to choose the option to send a hold cancellation notice.

#### *Title holds with one items attached*

- Under **Limit Display to:** change the search to **Hold Status** and type “bib hold, 1 attached” in the search box.
- Keep the **Pickup** Location at your library.
- Click the **View Outstanding Holds** button.
- Sort the list by location by clicking on the **Date Placed** heading.
- Look at all holds older than a month.
- Right-click on each item and select **View Bib**.
- Check the status of the item in the record tab. If the item is long overdue, missing, discarded, in repair, billed, etc. you will need to cancel the patrons hold and replace it on another record, if possible. If there is no other item to place the hold on, cancel the hold and choose the option to send a hold cancellation notice.