Place hold
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Find information about creating hold requests from a bibliographic record and from a patron account in WorldShare Circulation.

Note: See Available hold types for additional information.

Create hold request from a bibliographic record

1. On the left panel, use Discover Items to retrieve the item. On the Copies screen, in the upper right corner, click Holds.
2. On the Holds screen, click Hold Request. The Create New Hold Request window shows the title of the item and a default Pickup location.
3. From the Create New Hold Request window, change the settings as needed.
   ◦ Pickup Branch - If the patron prefers a different location, select the preferred library from the list.
   ◦ Pickup Location - Additional Pickup Locations appear if they are configured for the selected Pickup Branch in the Branch Locations section of the OCLC Service Configuration and are available as configured in the Hold Pickup Locations Map. Select a Pickup Location to specify a specific location within the branch to retrieve materials.
   ◦ Hold - To set an expiration date, click the calendar button and select a date.
   ◦ Suspend (Optional) - If the patron does not need the item between certain dates, specify the starting and ending dates using the calendar button.
   ◦ Move patron to top of queue - Makes the patron the first person in the holds queue for the item.
   ◦ Notes (optional) - Provide additional details about the patron's request before and/or after the hold has been fulfilled.
     ▪ Use the Public option for notes visible to the user. Patrons are able to view and update notes when signed in to WorldCat Discovery>My Account via Edit Request. See My Account.
     ▪ For internal notes visible by library staff, use Staff. The staff hold note will display on the Pull List, Holds for Review report, in the patron's hold queue, and when viewing or editing hold details. The staff note can also be added to the Pull List Entry receipt.
4. In the Patron box, scan or type the patron barcode.
   To search for a patron, click Find. The Search for Patron window appears with the patron listed in the Patron box. Click the patron name to select it.
5. Click Save Changes.
   ◦ If patron cannot place holds:
     ▪ If the patron does not have permission to place items on hold, an alert message appears. Depending on your account, you may have to enter an override. To place the hold, click Acknowledge. See Circulation Account roles, Overrides for more information.
   ◦ If no holds accepted on the item:
     ▪ If the item cannot be placed on hold, an alert message appears. Depending on your account, you may have to enter an override. To place the hold, click Acknowledge. See Circulation Account roles.
6. After creating a hold request, the item's status and your next steps depend on whether the item is available:
   ◦ If the item is available, it appears on the Pull List (in the Reports section of the Circulation module). The item's status is In Queue.
     Note: Item-level holds appear on the Pull List of the branch that holds them.
   ◦ If the item is unavailable (on loan or in transit), it cannot appear on the Pull List. Instead, when the item is checked in, its status changes to On Hold automatically.
   ◦ If there are no items for a title or no items available in the specified fulfill from location, the title level hold request does not appear on the pull list. It will appear on the Open Holds report.
   ◦ Please note that not all holds may appear on your pull list. Please see Pull list for more information.

Watch a video

Place holds (05:44)
This six-minute video shows how to place a hold from a bibliographic record in WorldShare Circulation. It also explains the difference between title-level and item level holds and when you would use each.

Place a hold from an item record
For single-part or multi-part items, you can request an item-level hold. For example, the library may have 5 copies of a periodical. To request a hold on a single issue, locate its item record (either search for the barcode or navigate from the Copy screen to the Item Details screen). From the Item Details screen, click Place Hold, and follow steps 2-6 above.

Complete the hold process
1. Retrieve the item from the stacks.
2. Check in the item, which changes its status to On Hold.
3. Put the item on the Hold Shelf for the patron to pick up.

Create hold from a patron account
1. In the patron account, click the Holds tab.
2. On the Holds tab, click Create Hold.
3. The Create New Hold Request window opens. There are three ways to retrieve the item:
   a. Item level
      1. Click Item level.
      2. In the Barcode field, type the barcode of the requested item.
b. Search
   1. Click Find.
   2. Select the index from the Search list, type the search term, and click Search or press <Enter>.
   3. In the search results, click the title of the item to select it or click Cancel to return to the Create New Hold Request window.

c. Title level
   1. Click Title level.
   2. In the Bib/OCLC # field, type the OCLC control number for the requested item.

4. In the Create New Hold Request window, change the settings as needed.
   ◦ Pickup Branch - If the patron prefers a different location, select the preferred library from the list.
   ◦ Pickup Location - Additional Pickup Locations appear if they are configured for the selected Pickup Branch in the Branch Locations section of the OCLC Service Configuration and are available as configured in the Hold Pickup Locations Map. Select a Pickup Location to specify a specific location within the branch to retrieve materials.
   ◦ Hold - To set an expiration date, click the calendar button and select a date.
   ◦ Suspend (Optional) - If the patron does not need the item between certain dates, specify the starting and ending dates using the calendar button.
   ◦ Move patron to top of queue - Makes the patron the first person in the holds queue for the item.
   ◦ Notes (Optional) - Provide additional details about the patron's request before and/or after the hold has been fulfilled.
     ▪ Use the Public option for notes visible to the user. Patrons are able to view and update notes when signed in to WorldCat Discovery>My Account via Edit Request. See My Account.
     ▪ For internal notes visible by library staff, use Staff. The staff hold note will display on the Pull List, Holds for Review report, in the patron's hold queue, and when viewing or editing hold details. The staff note can also be added to the Pull List Entry receipt.

5. Click Save Changes.
   ◦ A message displays verifying the hold was created.
   ◦ If patron cannot place holds:
     ▪ If the patron does not have permission to place items on hold, an alert message appears. Depending on your account, you may have to enter an override code. To place the hold, click Acknowledge. See Circulation Account roles, Overrides for more information.
   ◦ If no holds accepted on the item:
     ▪ If the item cannot be placed on hold, an alert message appears. Depending on your account, you may have to enter an override code. To place the hold, click Acknowledge. See Circulation Account roles, Overrides for more information.

6. After placing a hold, the item's status and your next steps depend on whether the item is available:
   ◦ If the item is available, it appears on the Pull List (in the Reports section of the Circulation module). The item's status is In Queue.
   ◦ If the item is unavailable (on loan or in transit), it cannot appear on the Pull List. Instead, when the item is checked in, its status changes to On Hold automatically.
   ◦ Please note that not all holds may appear on your pull list. Refer to the Open Holds report. Please see Pull list for more information.
Complete the hold process

1. Retrieve the item from the stacks.
2. Check in the item, which changes its status to On Hold.
3. Put the item on the Hold Shelf for the patron to pick up.

Watch a video

Overrides (4:47)

In this video, you’ll learn how to process exceptions to your library’s circulation policies (such as checking out a non-circulating item), and when this requires override credentials.

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