How do I limit number of holds allowed for a patron on popular resources, such as High Use, New Titles, DVD's or Laptops?


Applies to
- WorldShare Circulation

Answer
You can limit the number of holds a patron type can have on certain items on a shelving location, when using Title-level holds. You will need to create a Hold Limit policy of 1 and then other matching policies, setting up the policy maps for the situation you require. When set in place, this will allow a patron to only have one hold on a specific item, at any one time. This could be used to restrict holds being placed on very popular resources, such as Laptops, DVD's, High Use, New Titles etc...

Note: This does not work if you allow or use item level-holds, as the patrons will be able to have 1 hold on each barcode (copy/item) on a record, before they are blocked by this policy. Staff will ONLY be warned that this Patron has a hold by a pop-up message, if they have a hold on that specific barcode already.

- Log into Service Configuration > WMS Circulation > Holds & Schedules and set up the following
  - Hold Limit Policy - 1 limit policy (1 items can be held)
  - Hold Limit Policy - 1 limit (allows 1 holds)
  - Hold Limits Matrix - (who this limit policy applies to)
  - Holds Request Policy - 1 item Policy (allow 1 requests)
  - Holds Request Map (who this request policy applies to, what material format, hold request policy used)
  - Hold Fulfilled Policy - 1 fulfillment (allows 1 hold to be fulfilled only)
  - Hold Fulfillment Policy Map - (who this rule applies to, what material type, branch, shelving location, which fulfillment policy)
  - Location policy will need to be set up for each branch - so a hold can be overridden by staff, if required when an item-hold has been placed

Additional information
- If you allow item-level hold in Discovery, it would be best not to have the Place Hold button displaying on these items.
• To remove the place hold button see: How do I keep the place hold button from displaying in for items in specific shelving locations?

• You can also set up Shelving Location Messages to inform patron to place their holds at the Circulation desk for these items "Please See Library Staff at Circ desk to place a hold on this item". Go to Service Configuration > Holding Codes & Shelving Location Messages > Shelving Location Messages (WMS Only) > Create messages > Create the message required for the holding code and shelving location.