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 Parton 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.