Location Policy

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Use this screen to configure item availability, hold fulfillment availability, reshelving period, and in processing status for items based on their location. To access this screen, sign in Service Configuration, open the WMS Circulation left navigation, select Location Policy.

Use this screen to configure item availability, hold fulfillment availability, reshelving period, and in processing status for items based on their location.

Implementing/migrating libraries: Do not edit Location Policy until your Implementation Manager has notified you that your migration is complete.

- If you change these settings before your migration is complete, all of your items will have these settings.
  - If you change Available to Unavailable, your items will have the status of Unavailable.
  - If you change In Processing Mode to Until Checked In, your items will have the status of In Processing until they are manually checked in.

Processing order

Each row you configure forms an individual location policy. The system evaluates all rows and selects the best match as follows:

- Match to a specific Holding Location, Shelving Location, and Material Format
- Match to a specific Holding Location and Shelving Location where Material Format is set to 'All'
- Match to a specific Holding Location and Material Format where Shelving Location is set to 'All'
- Match to a specific Holding Location where Shelving Location and Material Format are set to 'All'

It is strongly recommended to have a row for each Holding Location where Shelving Location and Material Format are set to All. If this is not configured and saved, you will receive an error when trying to receive items that have Place Patron Hold set to Yes. Please see Place Patron Hold for more information.

Create or edit location policies

If a location policy affects item availability, in some situations you may need to check the item in for the location policy to apply:

1. You add or edit a location policy and the availability changes for items already in that location.
   Example: Your library has a shelving location called "Out for Repair" and you decide you want items in that location to Unavailable.
You create a location policy that stipulates Unavailable for all items in the "Out for Repair" location.

To implement the change in availability for items in this location, you must check in the items.

2. You are applying an existing location policy to an item that you are moving to that location.

   **Example**: Your library has a branch location called "Institutional Archives" and you want to move an item from the "Main Branch" to this location.

   ◦ The availability for items in this location is set to Unavailable.
   ◦ For the location policy to be applied and availability to change, you must check in the item.

### Create or edit a location policy

1. On the Location Policy screen, fill in the fields in the order below:

   1. **Holding Location**: Holding Code, as set on the [Holding Codes Translation Table](#) screen. You must select a holding location in order to select a shelving location.

   2. **Shelving Location**: Shelving Location, as set on the [Holding Codes Translation Table](#) screen. If an item has a temporary and permanent location in WMS, the circulation policy will use the temporary location.

   3. **Material Format**: Material format is defined in an item's WorldCat record. For more information, see [Material Type Names and Codes](#) to determine how the WorldCat record provides material format.

   4. **Available?**: Select if items at this location show as Available or Unavailable in the WorldCat Local/Discovery.

      ◦ Items marked Unavailable are not available for circulation and cannot fulfill holds.
      ◦ Changing item availability on this screen does not automatically change the item status. Item status will only change after the item is checked in.
      ◦ For more information on how statuses appear to patrons and staff, see [Check item status or location](#).

   5. **Fulfill Holds for**: Select patrons for which staff (without an override) can place holds for items at this location. Settings vary, depending on whether your library has multiple branches or is part of a WMS group. See 6. Can Override Holds? below for more information on override settings.

      • **Library with a single location**: You have two options.
        ◦ **All patrons**: Hold requests are allowed.
        ◦ **No patrons**: Hold requests are not allowed.

      • **Library with branch locations**: You have three options.

        ◦ **All patrons**: Items from this location can fulfill hold requests for any patron.
        ◦ **Branch patrons only**: Only patrons whose Home Branch (in their patron record) matches the Location Policy of the item can place a hold on the title.

          ▪ **For titles where this is the only branch that holds a qualifying item**:

            ▪ The item may only be requested by patrons whose Home Branch matches the Holding Location of the item.
            ▪ Patrons from other branches cannot request these items.

          ▪ **For titles where there are qualifying items across multiple branches**:

            ▪ Items at the selected Holding Location may only be requested by patrons whose Home Branch matches the Holding Location of the item.
            ▪ Patrons from other branches cannot request the items from this Holding Location.
            ▪ However, there may be other location policies in place that allow the items at other Holding Locations to be requested by any patron, regardless of the patron's Home Branch.
Other branch patrons only: Items from this location can only fulfill hold requests for patrons of other branches.

No patrons: Items from this location cannot be used to fulfill hold requests.

Library that is part of a WMS group

All patrons: Items from this location can fulfill hold requests for any patron.

Branch patrons only: Only patrons whose Home Branch (in their patron record) matches the Holding Location of the item can place a hold on the title

- For titles where this is the only branch that holds a qualifying item:
  - The item may be requested only by patrons whose Home Branch matches the Holding Location of the item
  - Patrons with other Home Branches will not be able to request these items

- For titles where there are qualify items across multiple branches:
  - Any item at the selected Holding Location may be requested only by patrons whose Home Branch matches the Holding Location of the item
  - Patrons from other branches will not be able to request items from this Holding Location
  - However, there may be other location policies in place that allow the items at those holding locations to be requested by any patron regardless of the patron's home branch

Institution patrons only: Only patrons whose home institution matches the holding institution of the item can place a hold request on the title.

- For titles where this is the only institution in a group that holds a qualifying item:
  - The item may only be requested by patrons whose home institution matches the holding institution of the item.
  - Patrons from other institutions cannot request these items.

- For titles where there are qualifying items across multiple institutions in the group:
  - Items at the selected institution may be requested only by patrons whose home institution matches the holding institution of the item.
  - Patrons from other institutions cannot request the items from this library.
  - However, there may be other location policies in place that allow the items at those institutions to be requested by any patron regardless of the patron's home institution.

Other branch patrons: Items from this location can only fulfill hold requests for patrons of other branches in my WMS Group, including my institution.

Other institution patrons only: Items from this location can only fulfill hold requests for the patrons of other institutions in my WMS group.

No patrons: Items from this location cannot be used to fulfill hold requests.

6. Can Override Holds?: Select if holds on items at this location can be overridden.

- Can Override Holds: Hold requests that are blocked based on the setting you selected in 5. Fulfill Holds for can be overridden by staff.

- Cannot Override Holds: Hold requests can never be overridden by staff. Select if hold requests should never be allowed based on the location policy

Example: You do not allow holds to be placed on items in your reference collection. (Shelving Location = Reference)

- Select the following settings:
- FulFill Holds For = No patrons
- Can Override Holds? = Cannot Override Holds

**Example:** You do not allow holds to be placed on items in your Main Branch, New Books location. However, a title was specifically requested by a faculty member (Home Branch = Law Library) for preview, and you want to place a hold for them. (Shelving Location = New Books)
- Select the following settings:
  - Fulfill Holds For = Branch patrons only
  - Can Override Holds? = Can Override Holds
- See [Circulation Account roles, Overrides](https://help.oclc.org/Library_Management/WorldShare_Circulation/Configuration/OCLC_Service_Configuration_-_...) for more information.

7. **Resheling Period:** Enter the resheling period.
   - For the amount of time you enter, the item will have the status of Recently Returned (Available) in WMS.
   - If you do not want to set a resheling period, enter 0.
   - For more information on how statuses appear to patrons and staff, see [Check item status or location](https://help.oclc.org/Library_Management/WorldShare_Circulation/Configuration/OCLC_Service_Configuration_-_...).

8. **In Processing Mode:** In the In Processing Mode field, select if newly added items should display the status of In Processing in WMS.
   - **For Period:** A specified period of time, as set in the In Processing Period field (see step 9)
   - **None:** Never
   - **Until Checked In:** Until the item is checked in at the item's Holding Location
   - For more information on how statuses appear to patrons and staff, see [Check item status or location](https://help.oclc.org/Library_Management/WorldShare_Circulation/Configuration/OCLC_Service_Configuration_-_...).

9. **In Processing Period:** If you selected For Period in the In Processing Mode field, enter the amount of time that the item will display the status of In Processing in WMS after the item is created in the In Processing Period field.
   - For more information on how statuses appear to patrons and staff, see [Check item status or location](https://help.oclc.org/Library_Management/WorldShare_Circulation/Configuration/OCLC_Service_Configuration_-_...).

2. If needed, add or delete rows to add or delete policies.
   - To add a row, click the **Add button**.
   - To delete a row, click the **Remove button**.
3. Click **Save**.

**Place Patron Hold**

For the **Place Patron Hold** feature to function properly for purchasing requests in WorldShare Acquisitions, a Location Policy for all holding locations is required. If the required settings below are not saved, the hold request will fail when staff receive the item. For more information about the Place Patron Hold feature, please see [Purchase requests](https://help.oclc.org/Library_Management/WorldShare_Circulation/Configuration/OCLC_Service_Configuration_-_...).

1. Before you begin these steps, ensure you are in Service Configuration for your main branch. In the upper left corner, in the institution name drop-down list, find and select **your institution's name**, and click **Go**.
2. Click **WMS Circulation > Location Policy** in the left navigation.
3. Click the **plus sign** in the last column to create a new location policy.
4. Enter or select the following information for each column in the new row:
   - **Holding Location**
- Shelving Location*: All
- Material Format: All
- Available?: Available
- Fulfill Holds For*: All patrons
- Can Override Holds?: Set per local policy
- Reshelving Period: Set per local policy
- In Processing Mode: Set per local policy
- In Processing Period: Set per local policy

*These fields must be entered as shown in the table to ensure the Place Patron Hold functionality works properly.

Prevent hold requests based on shelving location

You can restrict placement of holds based on shelving location (e.g., you may not allow holds to be placed on reference material or items on reserve).

1. Before you begin these steps, ensure you are in Service Configuration for your main branch. In the upper left corner, in the institution name drop-down list, find and select your institution's name, and click Go.
2. Click WMS Circulation > Location Policy in the left navigation.
3. Review the settings for:
   - Fulfill Holds For - Specifies who can place holds.
     - For a single location library:
       - All patrons - Hold requests are not restricted
       - No patrons - No hold requests allowed
     - For a library with branch locations:
       - All patrons - Hold requests are not restricted
       - Branch patrons only - Only patrons whose home branch matches the holding location can place a hold request
       - No patrons - No hold requests allowed
     - For an institution that is part of a group:
• All patrons - Hold requests are not restricted
• Branch patrons only - Only patrons whose home branch matches the holding location can place a hold request
• Institution patrons only - Only patrons whose home library matches the home library of the item can place a hold request
• No patrons - No hold requests allowed

  Can Override Holds? - Indicates whether staff can or cannot override a hold request. See Circulation Account roles, Overrides for more information.

  Note: For patrons in WorldCat Discovery, a request will fail if restricted even if a Place hold button is available.

To restrict the Place hold button from appearing in WorldCat Discovery:

1. Click WorldCat Discovery and WorldCat Local > OPAC Statuses, Locations and Circulation Policies in the left navigation.
2. Click Item Availability from OPAC to expand the accordion.
3. From the configuration tabs, deselect the Fulfillment for (Level 1) checkbox to remove the Place hold button for a location.
4. Click Save Changes.

4. Click Save.

Related policies

Location Policy depends upon:

• Holding Codes Translation Table

Location Policy is related to:

• OPAC Statuses, Location and Circulation Policies