Hold Request Policy Map

Use this screen to create or edit rows in the hold request policy map to apply hold request policies to patron types and material formats.

To access this screen, sign in Service Configuration, open the WMS Circulation left navigation, select Holds and Schedules, and then select the Hold Request Policy Map link.

Use this screen to apply hold request policies to patron types and material formats.

**Processing order**

When an item is placed on hold, the system evaluates the rows in the map in this order until a match is found:

1. Top to bottom (rows)
2. Left to right (settings in rows)

When the system comes to the row where all the elements match the transaction, it applies the policy contained in that row and will not continue to the next row.

- To change a row's position on the map, use the up (↑) and down (↓) arrows.

It is recommended to:

- Put your most restrictive rows at the top of the map
- Have a row at the bottom of the map to cover all patron types and material formats

**Create or edit rows in the hold request policy map**

1. On the Hold Request Policy Map screen, fill in the fields in the order below:
   a. Patron Policy: Select the Patron Policy from the list. Create patron type policies on the Patron Type Policy screen.
   b. Material Format: Material format is defined in an item's master record. For more information, see Material Type Names and Codes to determine how the master record provides material format.
   c. Hold Request Policy: Select the Hold Request Policy. Create hold request policies on the Hold Request Policy screen.
   d. Add/Delete (rightmost column):
      - To add a row, click the Add button (➕).
      - To delete a row, click the Remove button (➖).
2. If needed, add or delete rows:
   - To add a row, click the Add button (➕).
To delete a row, click the Remove button.

3. To change a row’s position on the map use the up and down arrows.

4. Click Save.

Related policies

Hold Request Policy Map depends upon:

- Hold Request Policy
- Patron Type Policy
- Holds to Review Policy