Hold Fulfillment Policy Map

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

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

Use this screen to apply hold fulfillment policies to patron types and items.

Processing order

When an item is available to fulfill a 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 that:

- The rows at the top of the map describe the most specific scenarios at your library. For example, rows that have values other than 'All' selected for each parameter (e.g., Patron Policy, Shelving Location, etc.) should be at the top of the map.
- The last row of the map represents a catchall where each parameter is set to 'All.'
- Your library only includes a row for a specific scenario if a more general scenario cannot be applied.

Hold request policy map - Example

<table>
<thead>
<tr>
<th>PATRON POLICY</th>
<th>MATERIAL FORMAT</th>
<th>POLICY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>Book</td>
<td>Undergraduate Book</td>
</tr>
<tr>
<td>Graduate</td>
<td>Book</td>
<td>Graduate Book</td>
</tr>
<tr>
<td>All</td>
<td>Book</td>
<td>Faculty &amp; Staff Book</td>
</tr>
<tr>
<td>Staff</td>
<td>All</td>
<td>Staff Non-Book</td>
</tr>
<tr>
<td>All</td>
<td>DVD</td>
<td>Non-Staff DVD</td>
</tr>
</tbody>
</table>
### Create or edit rows in the hold request policy map

1. On the Hold Fulfillment Policy Map screen, fill in the fields in the order below:
   1. **Patron Policy**: Select the Patron Policy from the list. Create patron type policies on the [Patron Type Policy](#) screen.
   2. **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.
   3. **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.
   4. **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.
   5. **Hold Fulfillment Policy**: Select the Hold Fulfillment Policy from the list. Create hold fulfillment policies on the [Hold Fulfillment Policy](#) screen.
   6. **Add/Delete** (rightmost column):
      - To add a row, click the **Add button** (+).
      - To delete a row, click the **Remove button** (-).
      - To change a row's position on the map, use the **up** (↑) and **down** (↓) arrows.

2. Click **Save**.

### Related policies

Hold Fulfillment Policy Map depends upon:

- [Bill Reasons](#)
- [Holding Codes Translation Table](#)
- [Patron Type Policy](#)