Pickup Location
Last updated: Wed, 26 Oct 2022 17:14:13 GMT

Find information about using the Pickup Location report to monitor and manage upcoming and active hold requests for a specific pickup location.

Use the Pickup Location report to monitor upcoming and active hold requests for a specific pickup location. See and manage all holds that are pending fulfillment, have an assigned item that is currently in transit to the pickup branch, and are ready for pickup on the hold shelf. The report contains live, current system data enabling you to edit or delete holds as needed, check that all reserved items are still on the hold shelf, and reprint hold receipts for items that are ready for pickup. This report can be used in place of the Holds List Report available in WorldShare Reports.

Note: If your library participates in group circulation, the Pickup Location report will include all hold requests to be picked up at your location, including holds placed by patrons of other institutions in your group.

Access the report

To view the report, navigate to the Circulation tab, open the Reports accordion in the left menu and select Pickup Location.

- The Pickup Location report is accessible to all users with a Circulation or Student Worker role. See Circulation account roles for more information.
Sort and Filter

Sorting is available by hold Status (default) or by Title. The report will always be limited to active hold requests to be picked up at the branch that you have selected in WorldShare.

Filter the report using three optional filters:

1. Pickup Location filter
2. Status filter
3. Patron filter

**Pickup Location filter**

- Select none, one, or all branch locations currently configured as active pickup locations for the branch. See [Hold Pickup Locations Map](https://help.oclc.org/Library_Management/WorldShare_Circulation/Holds_management/Pickup_Location) for more information.
- By default, this filter is set to All pickup options at your branch, including any holds for pickup at the branch level.

**Status filter**

- Select one or more hold request statuses.
- By default, this filter is set to All hold statuses.
- Hold statuses are defined as:
  - **Pending**: The hold request is awaiting fulfillment in the queue.
  - **Getting ready**: An item is in transit or dispatched to the pickup location to fulfill the request.
  - **Ready for use**: A reserved item is waiting for the patron on the hold shelf.
  - **In use**: A reserved item is currently being used on library premises by the requesting patron.
    - See [Manage in-house use of items](https://help.oclc.org/Library_Management/WorldShare_Circulation/Holds_management/Pickup_Location) for more information about an optional workflow for managing in-house use of special collections.

**Status Details filter**

- Select to filter by one or more of the following filters:
  - Requires Approval
  - Requires Preparation
- See [Hold approval and preparation](https://help.oclc.org/Library_Management/WorldShare_Circulation/Holds_management/Pickup_Location) for more information.

**Patron filter**

- Search for all hold requests from a specific requesting patron. Your search will open the Search for Patron dialog where you can select the appropriate user or try a different search.
  - The selected patron's name will appear in place of the original search box.
  - Clear your selection at any time by clicking the X next to the patron's name.
  - You may search for any user; if there are no relevant hold requests, then the report will display no results.
  - The default search index is Name, ID, Email. You may choose a different index for subsequent searches from the Search for Patron dialog.
    - See [Search for a patron](https://help.oclc.org/Library_Management/WorldShare_Circulation/Holds_management/Pickup_Location) for more information.
- By default, the report is filtered to All patrons.

Note: All users with a Circulation or Student Worker role will be able to view patron information (name and barcode), search for requesting patrons using the Patron filter, and print hold receipts which may include patron data.
Use the report

Review the report to see more details about a request, update a hold, and reprint hold receipts. Available options from the Actions menu will reflect the status of the hold request and your user role abilities.

Use the Print button in the top right of the screen to print the rows currently visible on the report. You may view and print up to 100 holds per page.

Available options from the Actions menu include:

<table>
<thead>
<tr>
<th>ACTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mark In Use</td>
<td>Updates the hold to the In use status meaning the library patron is using the material in the library. See Manage in-house use of items.</td>
</tr>
</tbody>
</table>
| Mark Ready for Use | Returns the hold's status to Ready for use when the library user is done with the item for the time being or needs to temporarily step away from the item.  
  • Moving a hold back to Ready for use status implies that the patron intends to return to consult the item later. There is no limit to the number of times that a hold can be moved into In use status.  
  • Holds in In use status can be updated to Ready for Use.  
  • Holds in Pending or Getting ready status can only be updated to Ready for use status by checking in the item at the pickup branch. See Fulfill holds. |
| Mark Complete      | Indicates that the library user is done with the reserved item.  
  Holds in Ready for use or In use status can be updated using the Mark Complete action. |
<table>
<thead>
<tr>
<th>ACTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>View/Edit</td>
<td>View or edit the hold information. See <a href="https://help.oclc.org/Library_Management/WorldShare_Circulation/Holds_management/Pickup_Location">Edit a hold</a> for more information.</td>
</tr>
<tr>
<td>Approve</td>
<td>Approve the item for use. Materials will not appear ready for pickup to your patron or other members of library staff until the item is approved. Refer to <a href="https://help.oclc.org/Library_Management/WorldShare_Circulation/Holds_management/Pickup_Location">Hold approval and preparation</a>.</td>
</tr>
<tr>
<td>Prepare</td>
<td>Prepare the item for use. Materials will not appear ready for pickup to your patron or other members of library staff until the item is prepared. Refer to <a href="https://help.oclc.org/Library_Management/WorldShare_Circulation/Holds_management/Pickup_Location">Hold approval and preparation</a>.</td>
</tr>
<tr>
<td>Print Hold Receipt</td>
<td>Reprint hold receipts for holds that are in Ready for use status.</td>
</tr>
</tbody>
</table>