Hold requests

Last updated: Wed, 26 Aug 2020 14:37:03 GMT

Libraries using WorldCat Discovery and WorldShare Management Services have the ability to allow users to place holds on items, view and edit requests, and place special hold requests.

Note: This functionality is available only for WorldCat Discovery libraries that also use WorldShare Management Services.

Configure your request form

Note: For more information about configuring request forms, see Place Hold/Request Buttons, WMS Place Hold Form Display.

Institutions using the WMS Place Hold fulfillment action can use Place Hold form configurations to ensure the Place Hold form meets the needs of libraries of all sizes. Request forms are configured in Service Configuration.

Library staff can manage configuration based on form request types and elements:

Note: At least one request type must be configured when using the WMS Level 1 Place Hold functionality.

<table>
<thead>
<tr>
<th>REQUEST TYPE</th>
<th>CONFIGURE 'I NEED' REQUEST TYPE TO ON OR OFF?</th>
<th>CONFIGURE 'DATES I NEED IT' HOLD REQUEST DATE DISPLAY TO ON OR OFF?</th>
<th>CONFIGURE 'I WANT IT FROM' SHELVING LOCATION DISPLAY TO ON OR OFF?</th>
<th>CONFIGURE 'ITEM DESCRIPTION(S)/NOTE' HOLD NOTES DISPLAY TO ON OR OFF?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any copy</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Specific Copy/Volume</td>
<td>Y</td>
<td>Y</td>
<td>N/A</td>
<td>Y</td>
</tr>
<tr>
<td>Special Request</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
</tbody>
</table>

Note: At least one request type must be configured when using the WMS Level 1 Place Hold functionality.

To display the Dates I need it drop-down on your request form, enable the Display hold request date fields on place hold form setting.

To allow users to select shelving locations from the I want it from drop-down for Any Copy or Special Request request types, enable Display shelving locations on Any Copy and Special Request request types.
## Default Place Hold Request Type

Place Hold form request types will be determined as follows:

<table>
<thead>
<tr>
<th>MATERIAL TYPE</th>
<th>DEFAULT PLACE HOLD REQUEST TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. Any Copy, if configured</td>
</tr>
<tr>
<td>Non-serial</td>
<td>2. Specific Copy/Volume, if Any Copy is not configured</td>
</tr>
<tr>
<td></td>
<td>3. Special Request, if Specific Copy/Volume and Any Copy are not configured</td>
</tr>
<tr>
<td></td>
<td>1. Specific Copy/Volume, if configured</td>
</tr>
<tr>
<td>Serial</td>
<td>2. Any Copy, if Specific Copy/Volume is not configured</td>
</tr>
<tr>
<td></td>
<td>3. Special Request, if Specific Copy/Volume and Any copy are not configured</td>
</tr>
</tbody>
</table>

## Examples

### Any Copy, with Hold Notes

This Place Hold form allows borrowers to select a pick-up location and provide an item description or note.

Note: The **I need** drop-down menu is suppressed because there is only Request Type configured.
To configure your form to display in this way:

1. Go to Service Configuration > WorldCat Discovery and WorldCat Local > Place Hold/Request Buttons > For items owned by [Your Library].
2. Enable only the following fields:
   - Display hold request date fields on place hold form
   - Display Any Copy request type
   - Display hold notes field on Any Copy request
3. Click Save.

All Request Types, with Hold Notes

This Place Hold form allows borrowers to:

- Select Any Copy, Specific Copies or Volumes, or Special Request
- Specify a pick-up location
- Provide an item description or note
To configure your form to display in this way:

1. Go to Service Configuration > WorldCat Discovery and WorldCat Local > Place Hold/Request Buttons > For items owned by [Your Library].
2. Enable the following fields:
   - Display Any Copy request types
   - Display hold notes field on Any Copy request
   - Display Specific Copy/Volume request type
   - Display hold notes field on Specific Copy/Volume request
   - Display Special Request type

### Place a hold

1. [Search in WorldCat Discovery](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Reserve_and_request_items/Place_holds_on...) for the item you want to request.
2. Click on the title to view item detail.
3. Click to expand the Availability section of the record. If the item is available to reserve and Place Hold/Request buttons are enabled, select the place hold button.
   - If not authenticated, the institution’s sign in screen appears. Enter the User Name and Password.
4. The Place Hold Request form appears.
5. Select an option from the I need drop-down menu. If the selected item is a serial, the default place hold request is Specific Copies or Volumes, which allows you to specify which item is needed. Check the boxes next to the items you want to request. If the selected item is a monograph, the default place hold request is Any Copy.
6. Select your preferred lending location from the I want it from drop-down list.
7. Select your pick up location from the I want to pick up at drop-down list, if multiple pick up locations are available at your institution.
8. (Optional) Expand the Dates I need it option and provide From and To dates. The I cannot pick up... fields allow users to provide additional availability information.
9. (Optional) In the Item description(s)/Notes: field, users can provide additional information about the requested item or any specific instructions related to filling the request with a descriptive note of up to 500 characters.
10. Click Submit to complete the request. After submitting a hold request, users are taken to a Place Hold Confirmation Page. Messages specific to each item-level hold request help users understand if the request was wholly or partially successful. Hold request information including pickup location, hold dates, and hold notes...
View holds

Users can view their requests on the My Account screen. Each item-level hold submitted via a Specific Copy or Volume hold displays as an individual hold in a user’s account.

1. Select My Account from in the drop-down in the upper right corner of the screen.
2. Click on the Requested tab to view requested items.
   - If you are a Tipasa library, requests submitted through Tipasa will appear along side Hold requests in the Requested tab.

The REQUESTED tab will load 25 requests at a time. Use the SHOW MORE option at the end of the list of requests to view more if they are available.

Edit Request

Use the Edit Request option in the Submitted Date column to edit the hold information.

From the EDIT REQUEST screen, edit the:

- Pickup location
- Dates the user needs the item
- Dates the user cannot pick up the item
- Item Description/Notes

Select SAVE EDITS to confirm any changes or select CANCEL to discard them.

Cancel Request

Library users are able to cancel hold requests while the request is not in transit to the pickup location or ready for pickup.

Note: Requests with a status of Submitted can be cancelled. Requests that are not in this status cannot be selected individually and will not be selected if the Select All option is checked.

To cancel a request:

1. Select the individual request or use the Select All option to cancel all requests.
2. Select CANCEL REQUESTS.

Place a special hold request

Special requests help when users need specific items but do not have enough information about the items they need
from the item metadata. Special requests can also help when a user needs to request a specific material when the library does not have an item-level record for each part of a multi-part item.

To place a special hold request, users can select Special Request from the I need drop-down menu. The Special Request hold type requires a descriptive note of up to 500 characters.