Hold requests
Last updated: Tue, 13 Aug 2019 14:24:49 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

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. For more information about configuring request forms, see Place Hold/Request Buttons.

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

<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>

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

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

Serialization:

|               | 1. **Specific Copy/Volume**, if configured |
|               | 2. **Any Copy**, if Specific Copy/Volume is not configured |
|               | 3. **Special Request**, if Specific Copy/Volume and Any copy are not configured |

**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 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 for the item you want to request.
2. Click on the title to view item detail.
3. 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.
4. (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.
5. (Optional) In the Item description(s)/Notes, 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.
6. 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 display on the confirmation page.

### View holds

Users can view their requests on the user account page on the Holds tab. Each item-level hold submitted via a “Specific Copy or Volume” hold displays as an individual hold in a user’s account.

1. Click My Library Account in the upper right corner of the screen.
2. Click on the **Holds** tab to view requested items.

Holds information available on this page can include:

- shelving locations
- hold notes
- pick up locations
- additional holding information

---

**Edit or remove holds**

Requests can be changed and removed from the user account screen.

To remove a request:

1. Click the **Remove** button. A confirmation message appears.
2. Click **Yes, remove my hold**. The request is removed from your account.
To edit a request:

1. Click the **Edit** button. The Edit a hold for this item screen appears.
2. Change the selected pick up location or hold dates.
3. Click **Submit**. The request is updated.

**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 change the default hold request type setting to “Special Request” from the hold request type drop-down menu. The “Special Request” hold type requires a descriptive note of up to 500 characters.