

# Agency Holds Project 2015

## Holds: Give precedence to local holds

- When the Holds: Give precedence to local holds circulation option is enabled, the system fills item holds placed by your library's patrons on your library's books before filling holds placed by patrons of another library.

## How Giving Priority to Local Holds Functions

- When the Holds: Give precedence to local holds circulation option is enabled, the system functions as follows:
  - The system fills item holds placed by your library's patrons on your library's books before filling holds placed by patrons of another library.
  - When an item whose title or volume has multiple holds is checked in, the system first determines whether the item satisfies any local holds. If so, the system fills the first local hold in the queue.
  - If there are multiple local holds and/or there are holds in more than one hold queue, the system checks for the first local hold in each queue and then fills the local hold that is earliest.
  - Because local holds take priority, and therefore hold queue positions might not be accurate, the system suppresses the display of hold queue positions in the STATUS column when:
    - Patrons use the WebPAC to view their requests and holds.
    - Staff use Sierra to view the Hold tab in a patron record

## Agency Holds

- Marmot status Feb 2015: PAT AGENCY fields in patron records were correctly populated Jan 9, 2015; AGENCY fields in 3m item records still need work.

## How Agency Holds Work

- The system checks for holds when staff:
  - Check in an item
- When checking in an item or clearing the holdshelf, the system does the following:
  1. If your library has enabled the Holds: Give precedence to local holds circulation option, the system checks for local holds. If there is a local hold, the system fills that hold request. If there is more than one local hold, the system fills the first local hold in the hold queue.
    - The system takes this action even if the item is checked into a different location and must be put in transit to its Location Served (the item's owning location), even if a patron at the checkin location has also placed a hold on the item and even if that hold is earlier in the item's hold queue.
  2. If your library has not enabled the Holds: Give precedence to local holds circulation option, or this option is enabled but there are no local holds, the system checks for agency holds:
    - If the item with the hold contains an AGENCY fixed-length field in its item record, the system checks the Agency column of the Hold Pickup Locations table for a matching agency value.
    - If the system finds a matching agency value in one or more Hold Pickup Locations entries, it then checks for any holds placed for the matching hold pickup location(s).
    - If there is a hold placed for a hold pickup location for which there is an agency match, the system fills that hold. If there is more than one hold at the hold pickup location(s) for which there is an agency match, the system fills the first agency hold in the hold queue.
  3. If the system does not find any agency holds, the system fills the first fillable hold in the hold queue.
    - For example, if an item is checked in with an AGENCY fixed-length field value of "10 Eagle Valley Library District" and the Hold Pickup Locations table contains three entries assigned the "10 Eagle Valley Library

District" agency, the system checks first for local holds, if precedence for local holds is enabled. If there are no local holds or precedence for local holds is not enabled, the system checks for holds at each location associated with the three Hold Pickup Location entries assigned the "10 Eagle Valley Library District" agency. If the item has a hold at one of the pickup locations assigned the "10 Eagle Valley Library District" agency, the system fills that hold even if there are holds on the item earlier in the hold queue at other locations. If the item has multiple holds at one or more of the pickup locations assigned the "10 Eagle Valley Library District" agency, the system fills the hold associated with the "10 Eagle Valley Library District" agency that is earliest in the hold queue. If the item does not have a hold at any of the pickup, locations assigned the "10 Eagle Valley Library District" agency; the system fills the first fillable hold in the hold queue.

## **Sending items home**

Innovative can modify your system to automatically send items "home" to their owning locations when they are checked in, even if there are existing holds on those items. The system attempts to use the item to fill a hold only after it has been checked in at the owning location. See [Item Must Be Sent to Owning Location](#) for more information.

## **Enabling the Feature**

You must specify which locations in your Locations Served table you want to use this feature. Note that the system does not allow you to delete a location that has this feature enabled from the Locations Served table.

## **Compatibility with Other Features**

This feature overrides the Floating Collections product. When the Sending Items Home feature is enabled, the system ignores the setting of the Float Determiner table.