# On-Shelf Holds

Using On-Shelf holds to facilitate branch to branch lending

John Greer– Maureen and Mike Mansfield Library
The University of Montana- Missoula

# About Us

- ~1.6 million bibs
- 8 libraries that share one database
- 2 of those libraries are not part of the University system
- Have Voyager, Summon/360 Link, Primo/SFX

# Geography

Glacier National Park
Sunburst
Cut Bank
Shelby
Havre
Chinook
Harlem
Saco
Malta
Browning
Chester
Box Elder
Big Sandy
Valier
Conrad
Glasgow
Nashua
Frazer
Columbia Falls
Whitefish
Kalispell
Bigfork
Lakeside
Flathead National Forest
Hays
Choteau
Fort Benton
Fairfield
Sun Prairie
Great Falls
Pablo
Plains
Ronan
St Ignatius
Cascade
Belt
Denton
Jordan
Superior
Seeley Lake
Lolo National Forest
Missoula
Lewistown
Winnett
Hobson
Montana
Lewis & Clark National Forest
Helena Valley Southeast
Helena
Lolo
Florence
Stevensville
Victor
Hamilton
Philipsburg
Clancy
Townsend
Harlowton
Roundup
Miles City
Forsyth
Anaconda
Butte
Darby
Three Forks
Belgrade
Bozeman
Colstrip
Billings
Lame Deer
Busby
Columbus
Absarokee
Bridger
Red Lodge
Belfry
Bitterroot National Forest
Beaverhead National Forest
Ennis
Big Sky
Salmon
Gallatin National Forest
287
15
90
12
94
212
89
87
14

# Why?

- New discovery layers surface materials from other campuses more often
  - Primo/Summon etc.
- Public libraries already allow branch to branch materials delivery
- Desire to make the process as easy for patrons as possible
  - Not require ILL transaction
  - Just leverage current Voyager infrastructure

# Choices

- Could use call-slip
  - Pro: Separate module that is designed to transfer materials between circ happening locations, configurable
  - Con: Patron has to choose from the patron request screen what type of action to take
    - Do I place a hold?  Do I place a callslip? What's the difference?
- Could use regular holds and enable on-shelf
  - Pro: Patron only has one choice in opac
  - Con: Must build reporting system, entire system must participate

# Decision

- A group made up of representatives from each branch discussed the two choices presented
- All agreed to participate
- Decision was made to make it as simple for patrons as possible
  - The holds option was chosen
- Regular postal services would be used for item delivery to branch library

# Policies

- First thing to decide are circulation policies.
- On-shelf holds must be enabled for all branches
- Team chose settings to apply to all libraries/item types for items going out for delivery
  - Modeled settings after what was currently used for ILL patron and items combo

# Standard settings

- In Transit setting set to 5 days
- Hold Shelf life set to 7 days
- Daily fine of $0
  - Decided transfer of money between branches would cost more than the fines would generate
    - Lost fees/fines still apply
- Circulation period of 4 weeks
- Courtesy notice sent (email) 3 days before item is due

# Standard settings cont.

- Overdue notice sent day item becomes overdue, follow up notice sent 7 days later
- Item goes to lost @ 15 days overdue, patron charged processing fee and replacement cost.
  - Amount sent to owning library (if paid)
- Libraries will run hold reports once a day at a minimum (M-F)
- When libraries are closed they notify others that they are not able to fill any requests

# Library specific settings

- Each library gets to choose what item types are loaned to what patron types
  - If your patron type doesn't have ability to hold an item you will not have that option available
    - Some issues here as one bib can have holdings with different permission levels making it appear that you can place a hold
- Each library chose which of their patrons they would allow to place on-shelf holds too

# Library specific settings

- After policy meeting a matrix report was sent to each branch
  - They filled out what itypes were going to be available for branch loans
- Each library modeled matrix after current ILL policies

# More Library specific

- Each library also decided if they wanted to allow their own patrons to request own items
  - Can't disallow via the matrix.
  - Must just cancel holds after they are placed
  - Most allow and just page the collection for their users as well as the remote requests

# The process…

- First the patron finds an item in the catalog that they wish to have

New Title Search : Go Search History

Back to Title List Prev 8 of

## Mona Lisa's moustache : making sense of a dissolving world /

**Main Author:** Settegast, Mary.

**Title:** Mona Lisa's moustache : making sense of a dissolving world /

**Description:** x, 160 p. : col. ill. ;

**Publisher:** Grand Rapids, MI : Phanes Press, c2001.

This item
**Short View**
- Technical View
- Long View
- Contents
- More Like This

Actions
- Hold
- Print
- Export
- E-mail
- Add to My List
- Export to RefWorks

Google Books:

"About This Book"

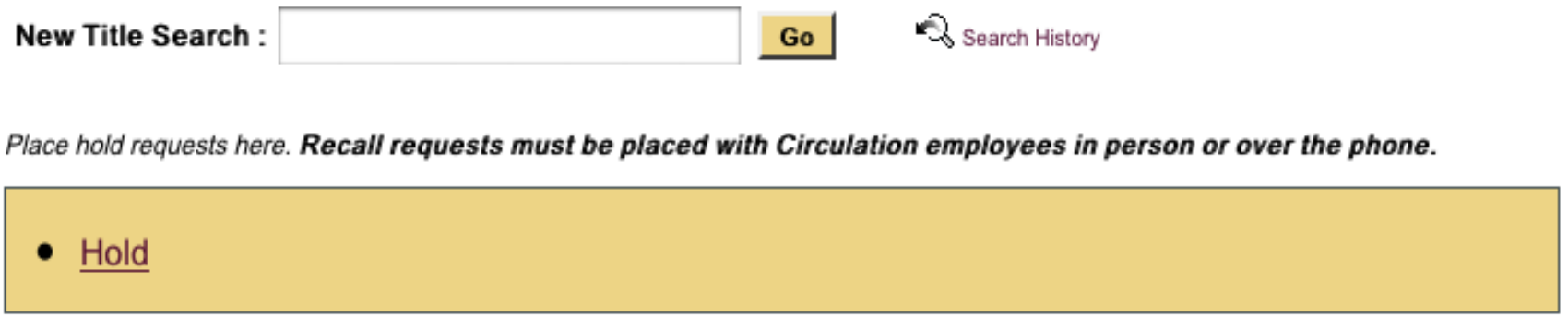
**Detailed Holdings**

**Location:** Missoula: UM-Missoula - Book Shelves - Level 2
**Call Number:** 306.09 S4956m
**Status:** Available
**Number of Items:** 1
Text me this call number

**Location:** Dillon: UM-Western Main Stacks - 2nd Floor
**Call Number:** 306.090 S4956m 2001
**Status:** Available

# Process…

- The patron would click on the Hold link in the catalog record and have to log in, then they get the following



# Process…

- Clicking the Hold link again…gives the hold action screen

**Hold**

Title: Mona Lisa's moustache : making sense of a dissolving world /

Instructions: Enter your identification number and specify your PICKUP location.

◉ Any Copy

○ This Copy: c.0 33342018516291 ud300399b Book 2

Comment:

Pick Up At: UM-Missoula

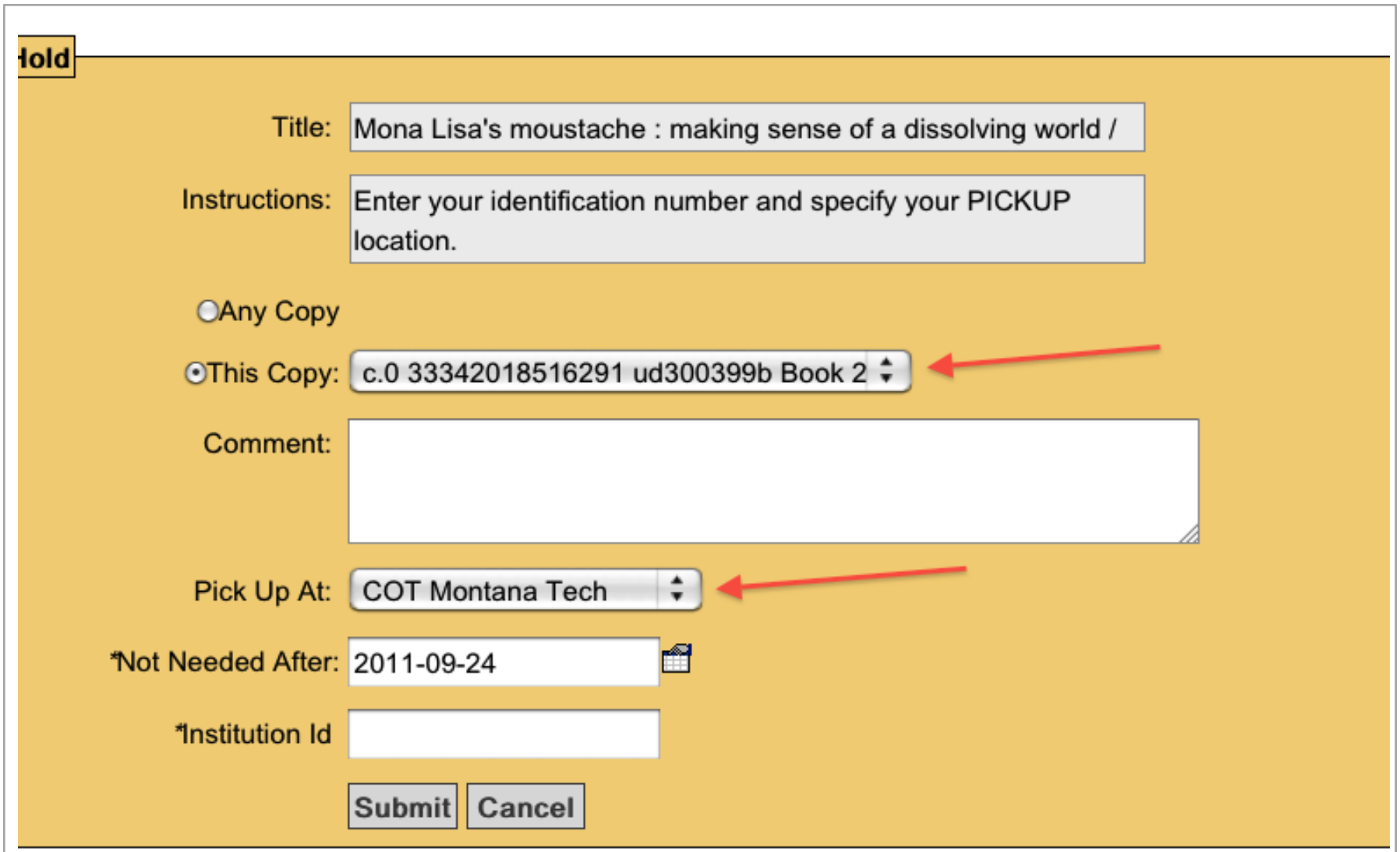
*Not Needed After: 2011-09-24

*Institution Id

Submit Cancel

# Process…

- This copy is the default out of the box, we had to edit cl_requestForms.xsl to make Any Copy the default
- The Hold action screen is where you can also choose to make a Any Copy hold, or to pick a specific copy
  - The This copy method is most often used with serials
- The Hold action screen is also where you can choose to change the pickup location of the item that you are placing the hold on


Hold
Title:
Mona Lisa's moustache : making sense of a dissolving world /
Instructions:
Enter your identification number and specify your PICKUP location.
Any Copy
This Copy:
c.0 33342018516291 ud300399b Book 2
Comment:
Pick Up At:
COT Montana Tech
*Not Needed After:
2011-09-24
*Institution Id
Submit
Cancel

# Little Gotchas

- When a user switches a hold from Any Copy (the default) to This Copy the Pickup location gets reset to the first library in the list
  - Users don't notice this sometimes
  - Reports are set to flag this and staff then should check the hold to see where the patron home library is
    - Not always done and this does cause problems for the first library in our list
  - Conversely sometimes Any Copy holds are placed on serial runs and staff has to determine which copy is really wanted.

# Patron Complete

New Title Search : Go Search History

Your request was successful.

Ba

## Mona Lisa's moustache : making sense of a dissolving world /

| | |
|---|---|
| **Main Author:** | Settegast, Mary. |
| **Title:** | Mona Lisa's moustache : making sense of a dissolving world / |
| **Description:** | x, 160 p. : col. ill. ; |
| **Publisher:** | Grand Rapids, MI : Phanes Press, c2001. |

**Detailed Holdings**

# Opac View

- The voyager catalog display now shows that the item has a hold on it….
  - Summon doesn't currently
  - Primo does show a request status

# Opac View

| | |
|---|---|
| **Location:** | Missoula: UM-Missoula - Book Shelves - Level 2 |
| **Call Number:** | 306.09 S4956m |
| **Status:** | has 1 requests |
| **Number of Items:** | 1 |

Text me this call number

| | |
|---|---|
| **Location:** | Dillon: UM-Western Main Stacks - 2nd Floor |
| **Call Number:** | 306.090 S4956m 2001 |
| **Status:** | has 1 requests |
| **Number of Items:** | 1 |

Text me this call number

| | |
|---|---|
| **Location:** | Pablo: Salish Kootenai College - Main Collection |
| **Call Number:** | CB 430 .S475 2001 |
| **Status:** | has 1 requests |
| **Number of Items:** | 1 |

# Staff side

- Once a request is placed staff need to run a system report to identify the request
  - Normal holds are identified during the discharge of an item
  - On-shelf holds can't really be identified in this manner
    - NO canned report to discover on-shelf holds either
  - We wrote 2 sets of reports to help staff identify the items that need to be pulled from the shelves.
    - One report, more full-featured needs ODBC drivers
    - Different report can be run via the web but limited in functionality

# Access Report

**Mona Lisa's moustache : making sense of a dissolving world /**

**Pickup Location:** Mansfield Library

**Patron:** Greer, John

**Comment:** I don't really want this. This is a test

**Request Date:** 8/25/2011

**Patron IID:** [redacted]

**Item:** Missoula: UM-Missoula - Book Shelves - Level 2

306.09 S4956m

33342018516291

**Item:** Dillon: UM-Western Main Stacks - 2nd Floor

306.090 S4956m 2001

33342016269984

**Item:** Pablo: Salish Kootenai College - Main Collection

CB 430 .S475 2001

30641000973516

# Report contents

- SQL available…too complex to go into here really
- Access report is made up of make/append queries all pulled together by a macro
- Online report is a union query that is much simpler but unable to account for all variables

# Online report

- Made up of three union queries
- First query pulls all copy level holds with a barcode status of 1 (Active) or Null (no barcode) with a holding at the library location
  - Some items don't have barcodes….
  - This query shows those holds that only we can fill
- The item status is also looked at and only those items are shown that are available for us to charge to a patron.
  - Not Charged, Discharged, In Process etc.

# Online part 2

- Part 2 is the same basic query except we don't limit to location, instead we use the hold_recall_id to limit to all title level holds at our location
  - This is done using a subquery
  - Pull hold_recall_id where type is Hold, Request_level is Title, Location is our library, and item is available
- This will show all items that we can potentially fill from our collection, and will show those other libraries that can fill the request as well
- Report shows item status so won't try to fill request for item already being sent by another library

# Online part 3

- This report pulls all holds where there is a title level hold but the hold has not been attached to an item.
  - This is uncommon but happened during our testing
- Looks for Title level holds on a holding at our location, then looks at the hold_recall_items table for a null hold_recall_id

# End Result

| Location | Call Number | Brief Title | Item Barcod | Item Status | Hold Level | Request Date | Pickup Locat |
|---|---|---|---|---|---|---|---|
| pgen Main Stac | QA 276.3 .T83 2 | Visual display ( | 3064100097900 | In Transit On Hold | Title | 8/26/2011 12:04:32 PM | UM-Missoula |
| T: tdgen Gener | 001.4226 T914v | Visual display ( | 3334202115817 | Not Charged | Title | 8/26/2011 12:04:32 PM | UM-Missoula |

# Circ Process now…

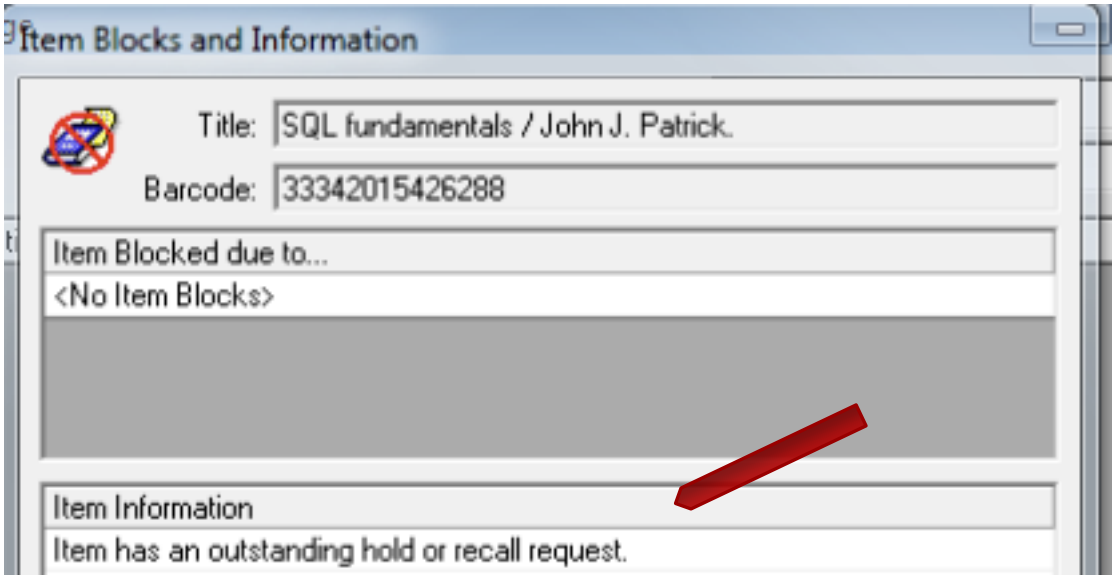
- The circ process is similar to the standard holds process.
- More libraries involved, more discharges to set status
- Also includes running reports to pull items from shelves for your patrons, and others
  - Remember modeled after ILL process

# Circ

- First step is that reports for your library are run
- Student is sent out to pull items from the shelves
- Items are brought back to main circ location and then discharged

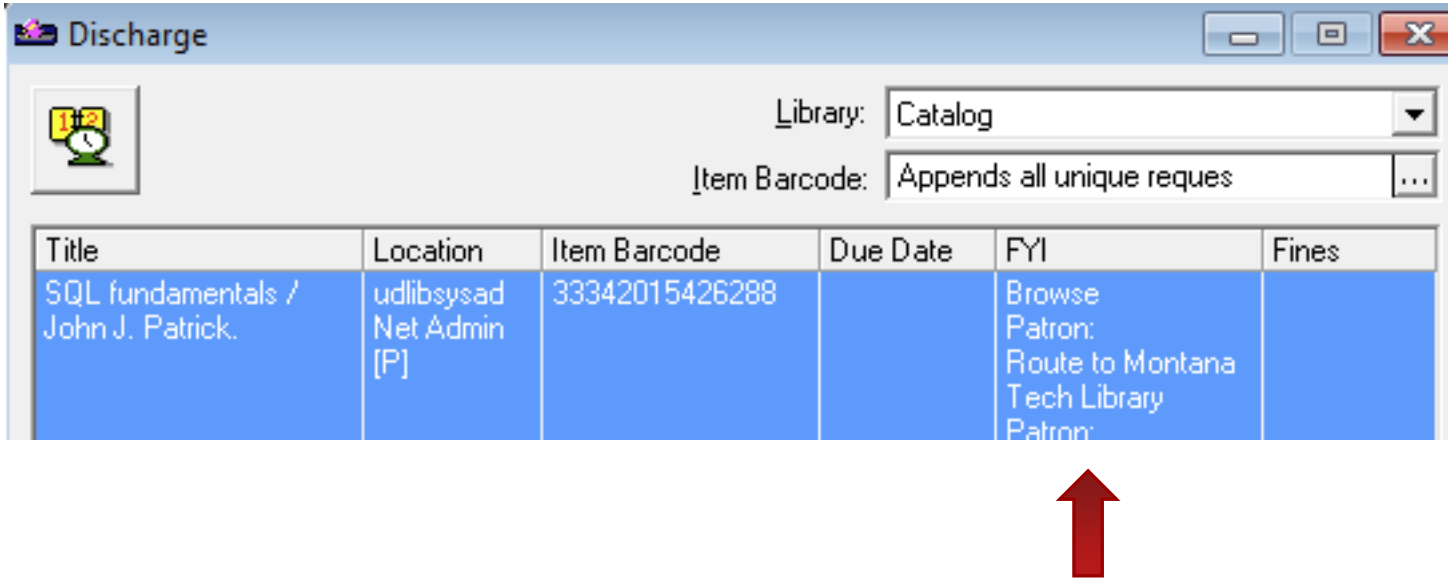
# Circ…

- Upon discharge the operator is notified that there is a hold on the item.



# Circ…

- The operator clears the pop-up by clicking ok, the next screen shows that the item is on hold at another location.



# Status

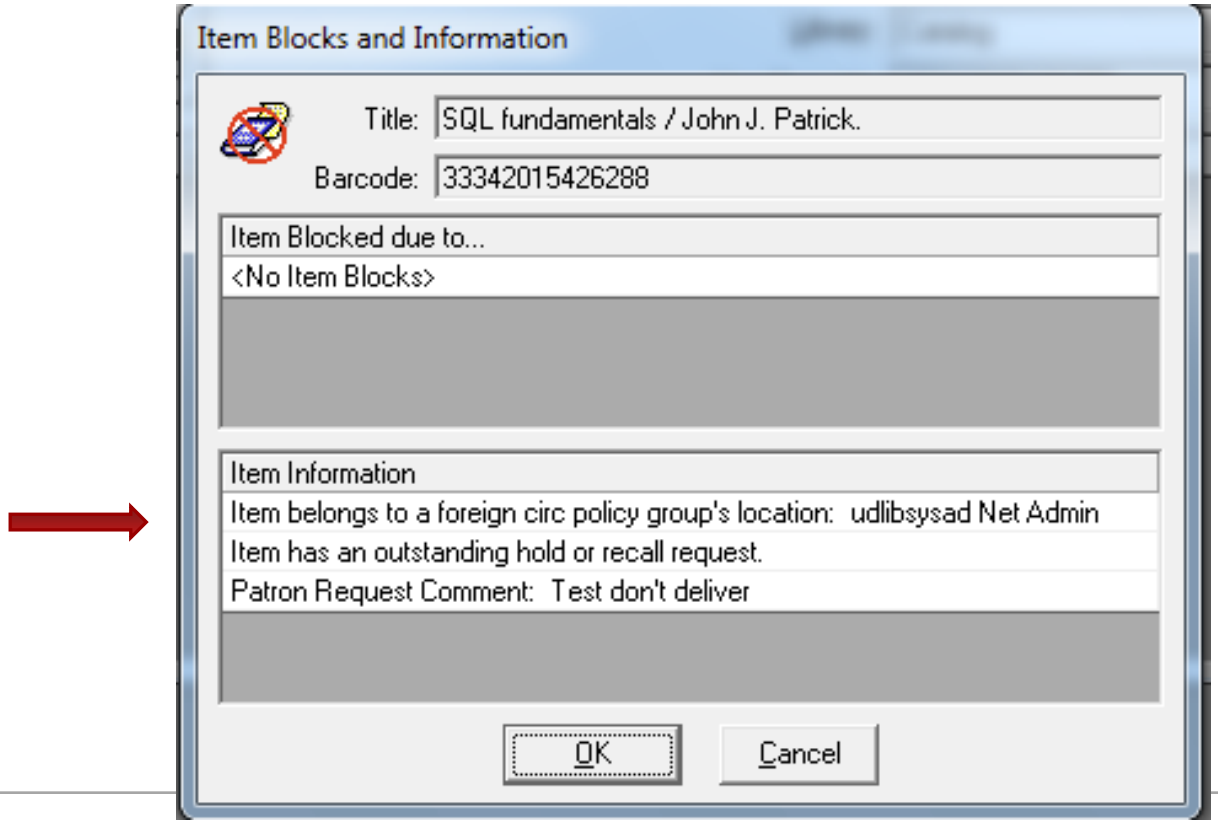
- Item status has now been set to In Transit

**Detailed Holdings**

| | |
|---|---|
| **Location:** | Missoula: UM-Missoula - Network Office - Ask at Info. Center |
| **Call Number:** | 005.7565 S111p |
| **Status:** | In transit 08-29-2011 (Requests: 1) |
| **Library Owns:** | CD-ROM |

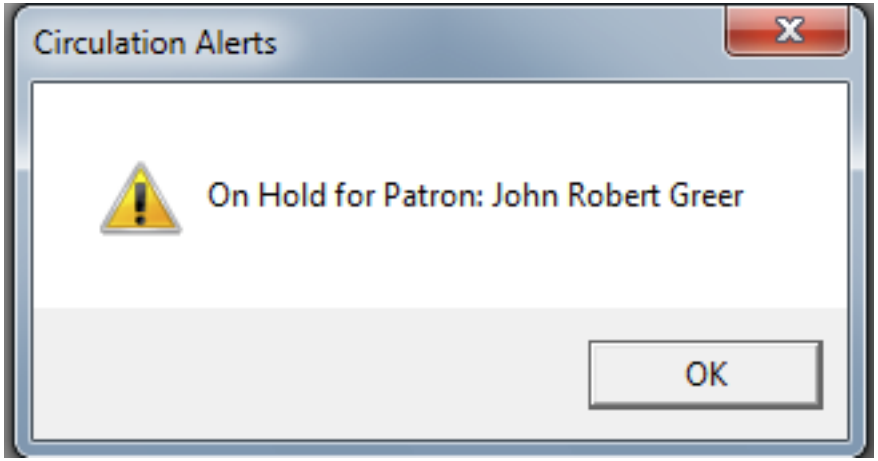
# Circ…

- Item is mailed to the remote location, upon arrival it is discharged again- another pop-up

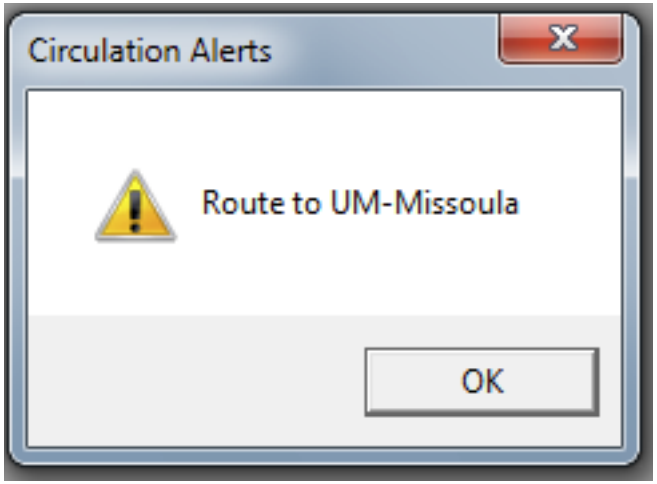


# Circ…

- And then the standard hold alert



# Circ…




- Patron is notified via standard holds notification process and checks out item when desired. Upon return the routing process starts up.
- When item is discharged an alert pops up that tells staff to route the item to the item home library
  - This is done via mail.

# Circ…

- When the item returns to the home library it is discharged once again
- This clears the in transit status and sets the item to the shelving cart location

# Done!!

- That's all there is to it
- Really not a hard process
- Lots of discharges to keep everything flowing properly

# Minor problems

- When multiple libraries own an item and can fill the request it can happen that more than one library will pull the item from their shelf.  The first library to discharge the item gets to fill the hold
  - The other libraries don't get a message indicating there is a hold so they just return item to shelf
- The previously mentioned This Copy issue.
  - This causes the most problems for us

# Minor Problems

- Smaller libraries that close for extended periods and a patron of theirs has an item from an open library
- Libraries not filling a hold because the report shows another library can provide the item when they really may not be able to due to circ policy restrictions.
  - Policy restrictions are not considered in reports- too complex
- Mailing costs when holds are sent to wrong library in error

# Questions?

- Any questions?
- SQL will be made available for those interested in it.