

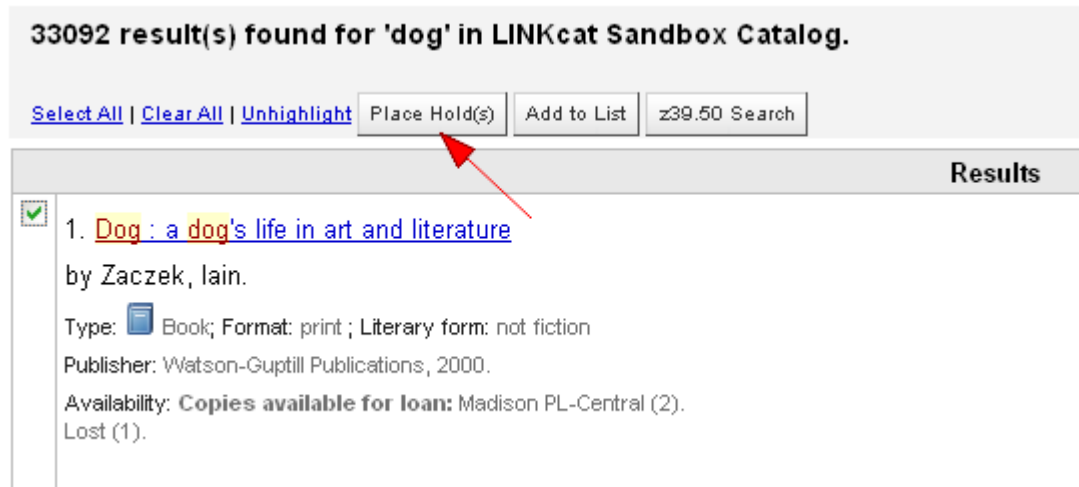
Holds Manual  
LibLime Koha version 4.8



## PLACING A HOLD

Staff members can place a hold for a patron in the staff client two ways:

1. Searching for the item first
  - a. In the search results list, click the check box next to an item and click the “Place Hold(s)” button



33092 result(s) found for 'dog' in LINKcat Sandbox Catalog.

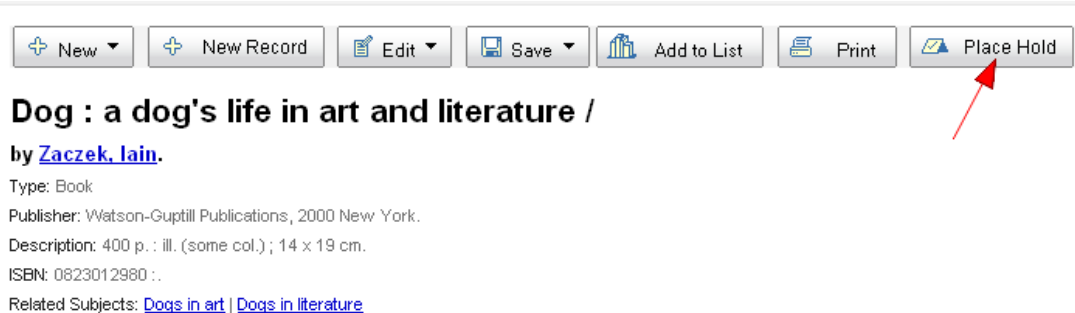
[Select All](#) | [Clear All](#) | [Unhighlight](#) | [Place Hold\(s\)](#) | [Add to List](#) | z39.50 Search

**Results**

1. [Dog : a dog's life in art and literature](#)  
by Zaczek, Iain.  
Type: Book; Format: print ; Literary form: not fiction  
Publisher: Watson-Guption Publications, 2000.  
Availability: **Copies available for loan:** Madison PL-Central (2).  
Lost (1).

OR

- b. Click on the item to view the bibliographic record, and then click “Place Hold”



[+](#) New ▾ | [+](#) New Record | [📄](#) Edit ▾ | [💾](#) Save ▾ | [📖](#) Add to List | [🖨](#) Print | [📄](#) Place Hold

**Dog : a dog's life in art and literature /**  
by [Zaczek, Iain](#).  
Type: Book  
Publisher: Watson-Guption Publications, 2000 New York.  
Description: 400 p. : ill. (some col.) ; 14 x 19 cm.  
ISBN: 0823012980 :.  
Related Subjects: [Dogs in art](#) | [Dogs in literature](#)

- c. Enter the patron information and click "Search"

### Place a hold on [Dog](#) :

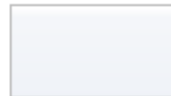
**Patron:**  
Enter patron card number or partial name:

**Hold details**

**Patron:** Not defined yet  
**Priority:** 2  
**Notes:**   
**Pickup at:**    
**Place a hold on the next available copy**

- d. Click on the intended patron and click "Select"
- e. Complete the choices below and click "Place Hold"

### Place a hold on [Dog](#) :



**Hold details**

**Patron:** [PTFS Administrator \(2907800admin 2\)](#)  
**Priority:** 2  
**Notes:**   
**Pickup at:**    
**Place a hold on the next available copy**

- 2. Search for the patron first

- a. From the Check Out tab of a patron record, click the “Search to Hold” button

- b. A pop-up window will appear showing the advanced search page. Enter search criteria and click “Search.”
- c. On the search results screen, each bib will have a button that says “Hold for XX Patron.” You may also select multiple titles by clicking the check boxes next to each title and clicking “Place Hold(s) for XX Patron”

## EXISTING HOLDS LISTS (HOLDS QUEUE FOR BIB RECORDS)

When a hold is placed on a bib, the hold is placed into a queue that is organized by date. The Holds Queue for an item can be viewed at the very bottom of the Holds tab in the bibliographic record.

Existing Holds

Priority	Patron	Notes	Date	Pick up Library	Details	Suspended	
1	<a href="#">Rachel Rappaport</a>		2010-11-26 00:00:00	Main Library	Next available	<input checked="" type="checkbox"/>	Resume on (optional): <input type="text"/>
2	<a href="#">readinghistory readinghistory</a>		2010-11-26 00:00:00	Main Library	Next available	<input type="checkbox"/>	Resume on (optional): <input type="text"/>
3	<a href="#">patronhistory patronhistory</a>		2010-11-26 00:00:00	Prairie du Sac Library	Next available	<input type="checkbox"/>	Resume on (optional): <input type="text"/>

Here staff can change the priority of the holds in the queue using the drop-down boxes in the priority column. Staff can also change the Pickup Library and suspend a hold (with or without a resume date).

## SUSPENDING HOLDS

Holds that are suspended keep their place in the holds queue, but are not filled until they resume active hold status. If suspended without a date, the hold stays suspended until manually resumed. If suspended with a resume date, a cron job called `resume_suspended_reserves.pl` runs overnight and resumes any hold marked for that date.

Staff can suspend a hold from the Existing Holds list in a bibliographic record or from the On Hold screen on the Checkout tab in the patron record.

Patrons can suspend holds from the Holds tab on the My Summary page in the OPAC.

Checked Out   Fines   **Holds**

Suspend All   Resume on:  (Optional, use format MM-DD-YYYY)

**Holds (4 total)**

Title	Placed On	Expires On	Pick Up Location	Priority	Status	Cancel	Suspend
<a href="#">Collector magazine &amp; price guide (magazine).</a>	02/03/2011		Madison PL-Central	3	Pending	Cancel	Items waiting cannot be suspended.
<a href="#">InSpire magazine (magazine).</a>	01/31/2011		Madison PL-Central	1	Pending	Cancel	Suspend Resume on: <input type="text"/> (Optional, use format MM-DD-YYYY)
<a href="#">Life! :</a>	11/19/2010		Main Library	1	Pending	Cancel	Items waiting cannot be suspended.
<a href="#">A new kind of job /</a>	11/26/2010		Main Library	2	Pending	Cancel	Suspend Resume on: <input type="text"/> (Optional, use format MM-DD-YYYY)

To suspend a hold, click the Suspend button. To Suspend a hold with an automatic resume date, enter the Resume Date in the text box (MM-DD-YYYY) and then click Suspend. To Suspend all active holds from the OPAC, click the Suspend All button directly above the Holds table.

Suspended holds in the staff client remain in the Existing Holds queue even though they are not active. Suspended holds in the OPAC, however, are displayed in a separate Suspended Holds table below the Holds table.

[Resume All](#)

### Suspended Holds (2 total)

Title	Placed On	Pick Up Location	Priority	Resume On	Resume Now
<a href="#">Life! :</a>	11/19/2010	Main Library	1	05/01/2011	<a href="#">Resume</a>
<a href="#">Collector magazine &amp; price guide (magazine).</a>	02/03/2011	Madison PL-Central	3		<a href="#">Resume</a>

To resume a suspended hold in the OPAC, click the Resume button next to the suspended hold. To resume all suspended holds, click the Resume All button directly above the Suspended Holds table.

In the staff client, the checkbox in the “Suspended” column can be unchecked in order to resume a suspended hold. In the Holds table in the patron record, a checkbox in the Suspend? column allows you to suspend all the patron’s holds at once.

## HOW THE SYSTEM FILLS HOLDS

When a hold is placed in LibLime Koha, it is automatically added to the holds queue. If StaticHoldsQueueWeight is set, LibLime Koha will rank the list of libraries statically and select the item from the highest ranking available location. If both StaticHoldsQueueWeight and RandomizeHoldsQueueWeight are set, the system will use the list of libraries in the StaticHoldsQueueWeight system preference and rank them randomly rather than statically. If only RandomizeHoldsQueueWeight is set, the system will randomly select from the list of all the available library codes.

If the system preference NextLibraryHoldsQueueWeight is ON, the system preference will follow the list of library codes specified in the system preference, beginning with the one listed after the item’s pickup location. It will traverse the list in sequence until finding a library code that has a matching item, wrapping around to the beginning to try to target the hold.

If libraries wish to reduce the transportation costs associated with transporting holds, there are system preferences to further customize the hold selection process. Three system preferences are involved: HoldsTransportationReductionThreshold, FillRequestsAtPickupLibrary and FillRequestsAtPickupLibraryAge (see appendix for descriptions).

If the FillRequestsAtPickupLibrary system preference is on, and an item is checked in at a library after being loaned to a patron, LibLime Koha will check the HoldsTransportationReductionThreshold system preference to make sure enough holds are in the queue to trigger Holds Transportation Reduction. If

HoldsTransportationReductionThreshold is set to 0 it will be triggered no matter how many are in the queue.

- If it is triggered, LibLime Koha will check the item's title's holds queue and find the highest-priority active hold that the item will fill whose pickup library is the same as the check-in library. If there is no hold meeting these criteria, then the hold transfer process will continue as usual.
- If the hold for pickup at this library is the highest-priority active hold in the hold queue, then LibLime Koha will just fill it—this is the normal situation for the highest-priority hold.
- If there are any higher-priority active holds that have been waiting longer than the FillRequestsAtPickupLibraryAge, then the item will fill the highest priority active hold, even though that will require transportation. Note that the highest-priority hold may not be the one that's been waiting longest.
- Otherwise, the item in hand will be used to fill the highest-priority hold that is to be picked up at the check-in library. This hold will jump the queue ahead of the others.

## HOLDS QUEUE REPORT

When staff is ready to fill holds, they may run the Holds Queue report and locate the items within their library. Each item gets checked in to trap the hold and it is either put in transit to the appropriate branch, or it is placed on the library's hold shelf for pickup.

The Build Holds Queue cron job populates the list (for all libraries at once – they are not staggered). This is typically run 2-3 times per day, but can be customized. Each time the cron job runs, the report is completely rebuilt. When an item is checked in and can fill a hold, LibLime Koha tries to find the first listing in the queue for that title (Hold #1). If the item cannot fulfill the first hold, it goes down the list to fill the next hold in the queue.

## Hold Queue

Showing 71 items found for Mazomanie Library (MAZ)

Title	Collection	Location	Call Number	Barcode	Patron	Send To	Date	Passed To	Fill	Action
<a href="#">A night too dark</a> <b>Stabenow, Dana.</b> BBC Audiobooks America, , 2010 : 8 sound discs (10 hrs.) : 4 3/4 in. ISBN: 9780792769187   079276918X   9	CDAFI	AD	STA	Selected copy: <a href="#">39078072942890</a>	<a href="#">YOUNG, BONNIE M.</a> <a href="#">(29369000001277)</a>	MCM	02/01/2010	MAZ	Check in at MAZ	<input type="button" value="Pass All"/>
<a href="#">Against the tide of years /</a> <b>Stirling, S. M.</b> Roc, , 1999 : 454 p. ; 18 cm. ISBN: 0451457439 (pbk.)	PAAFISF	AD	SF PAPER STI	Selected copy: <a href="#">39078051046739</a>	<a href="#">FRYE, ADAM LOUIS</a> <a href="#">(29078013759579)</a> *608-836-7265	MID	06/21/2009	MID	Check in at MAZ	<input type="button" value="Pass All"/>

The newly revised Holds Queue Report allows libraries to “Pass” items in the holds queue report. This means that if a library cannot (for whatever reason) fill that particular hold at that time, they can send it to the next library in line. The order of libraries is defined in the NextLibraryHoldsQueueWeight system preference, and the library the hold will be “passed to” is listed in the “Passed To” column in the Holds Queue report. A “Pass All” button exists in the Action header. In addition to the ability to “Pass” items, libraries can also set items to trace (or lost) using the drop-down boxes in the Action column.

## TRIGGERING A HOLD

To fill or trigger a hold, the item must be checked in at the holding branch. If the item needs to be transferred, a transfer window will pop-up alerting staff to send the item to the pickup branch. Click Confirm hold and Transfer to continue with the holds transfer process. The hold’s status now becomes “In Transit.”

**Hold Found: [The New Yorker \(magazine\).](#)**

**Hold for:**

- [Administrator, PTFS](#) (2907800admin\_2)
- 547 W. Main  
Neksooa, WI 54457

**Transfer to: Adams County Library**

When the hold is checked in at the pickup branch, the following Hold Found message will appear. Click Confirm to trap the hold and place it on the holds shelf (if applicable). The hold’s status now becomes “Waiting.”

**Hold Found (item is already waiting):**  
[The New Yorker \(magazine\).](#)

**Hold for:**

- [Administrator, PTFS](#) (2907800admin\_2)
- 547 W. Main  
Nekoosa, WI 54457

**Hold at Adams County Library**

Magazine, adult	GEN	WID	Adams County Library	MAA		Waiting at Adams County Library since 06/29/2011	06/29/2011	<a href="#">39078074250599</a>
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## HOLD SETTINGS

Holds Settings are in two locations in LibLime Koha:

1. **In Koha Administration > Circulation and Fines Rules**  
 Each patron category/item type combination can have its own Hold Policy (From Home Library, From Any Library, No Holds Allowed). If UseGranularMaxHolds is ON, you can also set the maximum number of holds allowed.
  
2. **In Koha Administration > Patron Categories**  
 Here, settings can be applied to an entire patron category. Holds settings available include: Hold Fee, Max Holds, Holds Block Threshold.

## HOLDS SYSTEM PREFERENCES

**AllowHoldDateInFuture** - If set a date field is displayed on the Hold screen of the Staff Interface, allowing the hold date to be set in the future.

**AllowHoldPolicyOverride** - Allow staff to override hold policies when placing holds

**AllowHoldsOnDamagedItems** - Allow hold requests to be placed on damaged items

**AllowMultipleHoldsPerBib** - This allows multiple items per record to be placed on hold by a single patron. To enable, enter a list of space separated itemtype codes in the field (i.e. MAG JMAG YMAG). Useful for magazines, encyclopedias and other bibs where the attached items are not identical.

**AllowOnShelfHolds** - Allow hold requests to be placed on items that are not on loan

**canreservefromotherbranches** - With Independent branches on, can a user from one library place a hold on an item from another library

**DisableHoldsIssueOverrideUnlessAuthorised** - If this preference is enabled, it will block the staff's ability to checkout items on hold, but includes a superlibrarian override.

**DisplayMultiPlaceHold** - If ON, displays the Place Hold button at the top of the search results list in staff and OPAC. Sites whose policies require tighter control over holds may want to turn this option off and limit users to placing holds one at a time.

**emailLibrarianWhenHoldIsPlaced** - If ON, emails the librarian whenever a hold is placed

**EnableHoldCancelledNotice** - If ON, allow hold cancellation notices to be sent.

**EnableHoldExpiredNotice** - If ON, allow hold expiration notices to be sent.

**EnableHoldOnShelfNotice** - If ON, allow hold awaiting pickup (holds shelf) notices to be sent.

**FillRequestsAtPickupLibrary** - Fill hold requests at your local library if possible before sending an item to another branch to fill a hold request.

**FillRequestsAtPickupLibraryAge** - Measured in days. If there are any higher-priority active holds that have been waiting longer than the FillRequestsAtPickupLibraryAge, then the item will fill the highest priority active hold, even though that will require transportation. Note that the highest-priority hold may not be the one that's been waiting longest.

**HoldButtonConfirm** - Display Confirm button when hold triggered. Leave either this setting or HoldButtonPrintConfirm on.

**HoldButtonIgnore** - Display Ignore button when hold triggered.

**HoldButtonPrint Confirm** - Display Confirm and Print Slip button when hold triggered. Leave either this setting or HoldButtonConfirm on.

**holdCancelLength** - Specify how many days before a hold is canceled

**HoldsTransportationReductionThreshold** - The number of holds that must be in the queue for the holds transportation reduction to be enabled ( assuming FillRequestsAtPickupLibrary is enabled ).

**HomeOrHoldingBranch** - Used by Circulation to determine which branch of an item to check with independent branches on, and by search to determine which branch to choose for availability

**MaxShelfHoldsPerDay** - Maximum number of on-shelf holds each patron can place per day.

**NextLibraryHoldsQueueWeight** - Specify a list of library location codes separated by commas -- the list of codes will be traversed and weighted with first values given higher weight for holds fulfillment -- alternatively, if RandomizeHoldsQueueWeight is set, the list will be used in order. This preference overrides both StaticHoldsQueueWeight and RandomizeHoldsQueueWeight.

**OPACAllowHoldDateInFuture** - If set, along with the AllowHoldDateInFuture system preference, OPAC users can set the date of a hold to be in the future.

**OPACDisplayRequestPriority** - Show patrons the priority level on holds in the OPAC

**OPACItemHolds** - Allow OPAC users to place hold on specific items. If OFF, users can only request next available copy.

**OPACUseHoldType** - If ON, allow OPAC users to place hold on specific items that are designated as item-level hold records. Used in conjunction with OPACItemHolds.

**RandomizeHoldsQueueWeight** - if ON, the holds queue in circulation will be randomized, either based on all location codes, or by the location codes specified in StaticHoldsQueueWeight

**RequestOnOpac** - If ON, globally enables patron holds on OPAC

**ReservesMaxPickUpDelay** - Define the Maximum delay to pick up an item on hold

**reservesNeedConfirmationOnCheckout** - Pipe-delimited list of types of prompts upon checkout with a hold pending: one or more of 'patronNotReservist\_holdPending', 'patronNotReservist\_holdWaiting', 'otherBibItem', 'noPrompts'.

*patronNotReservist\_holdPending*: the checkout patron is not the same as the reservist for the given item, and the hold is either the highest priority one or in transit but is not in the Waiting status. Options are to Requeue or Cancel.

**Please Confirm Checkout**

- [Aristotle is the bomb!](#) is **on hold** (priority 2) for **a different patron:**  
[courtesy2 courtesy2 \(394874\)](#)  
 Checkout anyway?

**Requeue:** Send reserve back to title's [Existing Holds](#) list  
 **Cancel Reserve**

Yes, Check Out (Y)     No, Don't Check Out (N)

*patronNotReservist\_holdWaiting*: the checkout patron is not the same as the reservist for the given item, and the hold is in the Waiting status. Options are to Requeue, Cancel, or Fill the hold.

**Please Confirm Checkout**

- [Aristotle is the bomb!](#) is **on hold** and waiting for **a different patron:**  
[courtesy2 courtesy2 \(394874\)](#)  
 Checkout anyway?

**Requeue:** Send reserve back to title's [Existing Holds](#) list  
 **Cancel Reserve**  
 **Fill Reserve:** current patron is authorized

Yes, Check Out (Y)     No, Don't Check Out (N)

*otherBiblItem*: the patron has a hold but the item being checked out is not the item picked of the same title. Options are Requeue, Cancel, or Fill the hold.

**Please Confirm Checkout**

[Aristotle is the bomb!](#) is **on hold** (priority 3)  
for this patron  
(same title, **different item**: [39344002022892](#))  
Checkout anyway?

<input checked="" type="radio"/> <b>Requeue</b> : Send reserve back to title's <a href="#">Existing Holds</a> list
<input type="radio"/> <b>Cancel Reserve</b>
<input type="radio"/> <b>Fill Reserve</b> : current patron is authorized

**ReservesNeedReturns** - If ON, a hold placed on an item available in this library must be checked-in, otherwise, a hold on a specific item, that is in the library & available is considered available

**StaticHoldsQueueWeight** - Specify a list of library location codes separated by commas -- the list of codes will be traversed and weighted with first values given higher weight for holds fulfillment -- alternatively, if RandomizeHoldsQueueWeight is set, the list will be randomly selective

**UseGranularMaxHolds** - If enabled, this allows you to define the maximum number of holds by a combination of itemtype & patroncategory -- there must be a number in the circulation rules, otherwise no holds will be allowed.