Holds requests in Aleph 16.02

Producing pick lists

- Nine sites up to 60 miles apart.
- Users may request books from any site to any other, whether available or not.
- Van only runs once or twice a week to furthest sites.
- "Main copy" and "like copies".
  - z37_hold_group
  - z37_source: "O" for main, "C" for like copies

Producing pick lists: built-in services

- p_cir_12 (Call slips for hold requests)
  - one sheet per book
  - considers process statuses
  - lists "main copies" only.
- p_cir_11 (Outstanding hold requests report)
  - "Available and unavailable items"
    - lists all "main copies" at the site, whether available or not
  - "Available items only"
    - lists all "main copies" at the site which are not on loan
  - "Available items, and non-available items with available like copies"
    - lists all "main copies" at site
    - if unavailable, lists like copies (possibly at other sites), but only on the report for the site owning the "main copy".

Producing pick lists: custom service

- devised by Lee Smith
- lists all suitable copies at a site
- copies are suitable if
  - not on loan
  - not in certain process statuses
  - not already on the hold shelf
- choreography between sites needed

Producing pick lists: example

Picklists: enhancements

- only list as many copies as are required
- list only at most appropriate site
- re-list if copy not found
- campus router?
- ICAU no. 1454? (only covers p_cir_12)

Updating items

- extra Z37 records created on item update (status, process status …)
  - these may "double up": don't delete them!
  - it's been fixed
  - it's "incorrect workflow"
- Z37 records not removed on item update
  - time-consuming to delete and replace holds
  - holds which are not yet active cannot be dealt with like this anyway
  - possibility of custom service or ICAU no. 1328

Holds in transit

- When an item goes in transit to satisfy a hold:
  - it is loaned to the transit patron for the pick-up site
  - z37s on other copies are discarded
  - but the z37_status of the remaining z37 record remains at "A".
- Undesirable consequences:
  - patron may place a further hold on other copies
  - if another copy is updated, hold will re-expand to that copy and may appear on pick-lists
  - if the copy is "diverted" to another patron, the first patron has to wait for that exact copy.

Holds in transit: ideas

- When an item goes in transit to satisfy a hold:
  - change z37_status to "T" for all z37s for that patron
  - do not delete any z37s at this stage
  - if the item then allocated to someone else, z37_status should change back to "A", though there may be a problem tying up the copy in transit with the hold.
- Possible enhancements:
  - if another copy returned at pick-up site before the copy in transit, this copy could be "grabbed" to satisfy the hold quicker
  - alternatively, might only do this if no other outstanding holds
  - "better" copies could also appear on pick-lists.

Holds on the hold shelf

- When an item goes onto the hold shelf:
  - z37s on other copies are discarded
- Undesirable consequences:
  - patron may place a further hold on other copies
- Suggested procedure:
  - check "multiple hold requests" privilege
  - check for z37s against that exact copy
  - check for satisfied holds (z37_status of "S") against like copies.

Problems with expired hold requests

- prevent patron placing a fresh hold
- counted in report of items in high demand (p_cir_14)
- show in no. of requests in WebOPAC
  - placeholder $1600 in item-global-body
- invisible from item record (GUI Circulation) even if on hold shelf

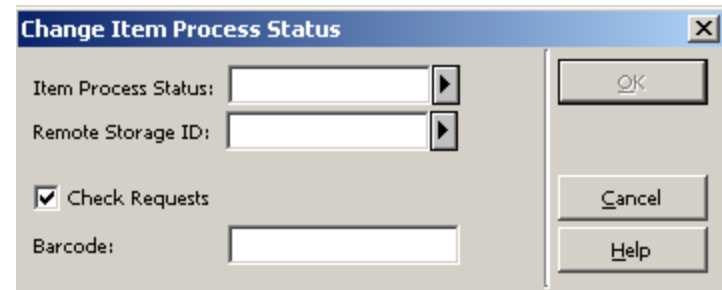| lection	Location	Pages	No. of requests
P Collection	PIB		2 (4/ 4)
P Collection	PIB		1 (4/ 4)

Problems with expired holds

- p_cir_17 (Delete expired hold requests)
  - "Note: expired hold requests are ignored in the system and it is not necessary to delete them in order to make them non-functional."
  - solves most of the problems, but …
  - … will delete z37s for holds on the hold shelf where the z37_end_hold_date is greater than z37_end_request_date
- Solution: run SQL before p_cir_17 to extend z37_end_request_date for holds which are on the shelf.

Interaction with acquisitions

- Holds placed at time of ordering are on the exact first copy ordered only.
- Moving an order from one ADM to another can have weird side-effects.

Hold request niggles

- cannot prevent users placing holds on available items for pick-up at the same site
- loan period is reduced if there are holds, even if there are lots of available copies (see ICAU no. 1572)
- reading room loans count towards global loan limits
- users cannot cancel a hold from the OPAC once an item has reached the shelf
- "check requests" option in Circulation GUI does not check "like copies"

Change Item Process Status

Item Process Status: [   ] ▶   OK

Remote Storage ID: [   ] ▶

☑ Check Requests   Cancel

Barcode: [   ]   Help