

On Order Holds

All Acquisitions libraries are allowed to use on-order holds. However, because the workflows change slightly when using on-order holds and some settings change, any Acquisitions library wishing to use on-order holds must notify the PINES Acquisitions Specialist first.

Considerations for using on-order holds

- Holds in PINES expire after 180 days of being unfilled. Therefore, libraries using on-order holds should be aware of how far in advance they order items. If they order items 3 months before release date and the patron places a hold shortly after the order date, that may leave the patron less than 3 months for the item to (1) arrive from the vendor, (2) be cataloged, and (3) go through the circulation time limits of any patrons who placed holds ahead of them. In this circumstance, it could be that the patron's hold expires before the hold can be filled.
- If a library uses vendor cataloging, vendor catalogers cannot move patron hold requests. Moving hold requests between records is an integral part of cataloging on-order copies. There is a process for moving hold requests in-house, but it requires 2 daily reports being run. This is a standardized process, but libraries just need to be aware that this would be a staff requirement. See [Using Vendor Cataloging](#).

Settings

Shelving Locations

Normally Acquisitions libraries set up their shelving locations to hide their Acq copies from the public. However, for libraries that do use on-order holds, these copies need to be visible to the public as well as holdable. Therefore libraries using on order holds should modify their ON ORDER shelving locations to these parameters:

- OPAC Visible: Yes
- Holdable: Yes
- Checkin Alert: No

Circulation Modifier

Libraries using on-order holds must use a specific circulation modifier when they are updating line items in Acquisitions. These circulation modifiers are intended to mimic age protection, so that patrons will get consistent behavior when placing holds. That is, if you normally use 3 month age protection, only branch patrons will be able to place on-order holds on their branch's items. If you normally use 6 month age protection, system patrons will be able to place on-order holds.

If you normally use 3 month age protection when cataloging, use the **on-order3** circulation modifier.

If you normally use 6 month age protection when cataloging, use the **on-order** circulation modifier.

Once the items are cataloged, they are protected as normal by age protection.

Cataloging

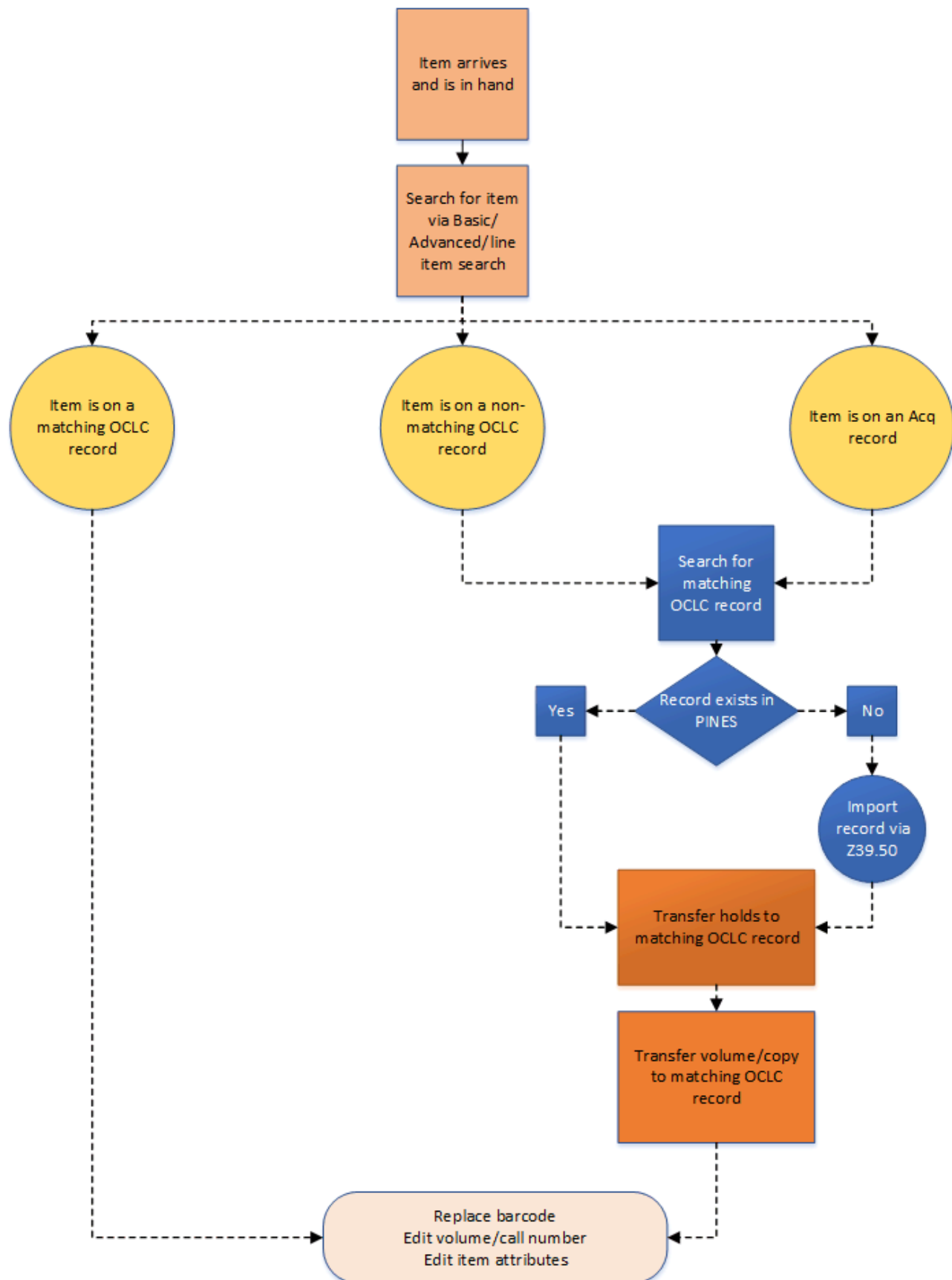
Cataloging when a library uses on-order holds is fairly similar to cataloging with Acquisitions without on order holds. The only difference is that catalogers should also move any title-level holds to a matching record when they move their copies.



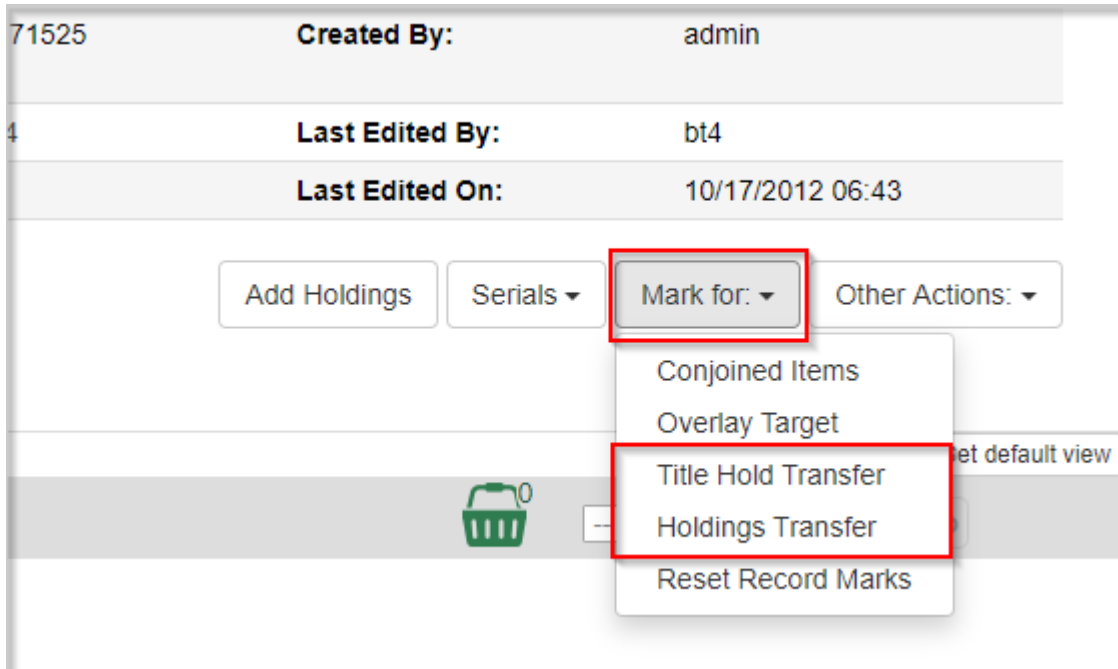
You can also watch videos demonstrating transferring these holds [here](#) through the PINES Learning Center.

Cataloging with Acquisitions

Including on order holds

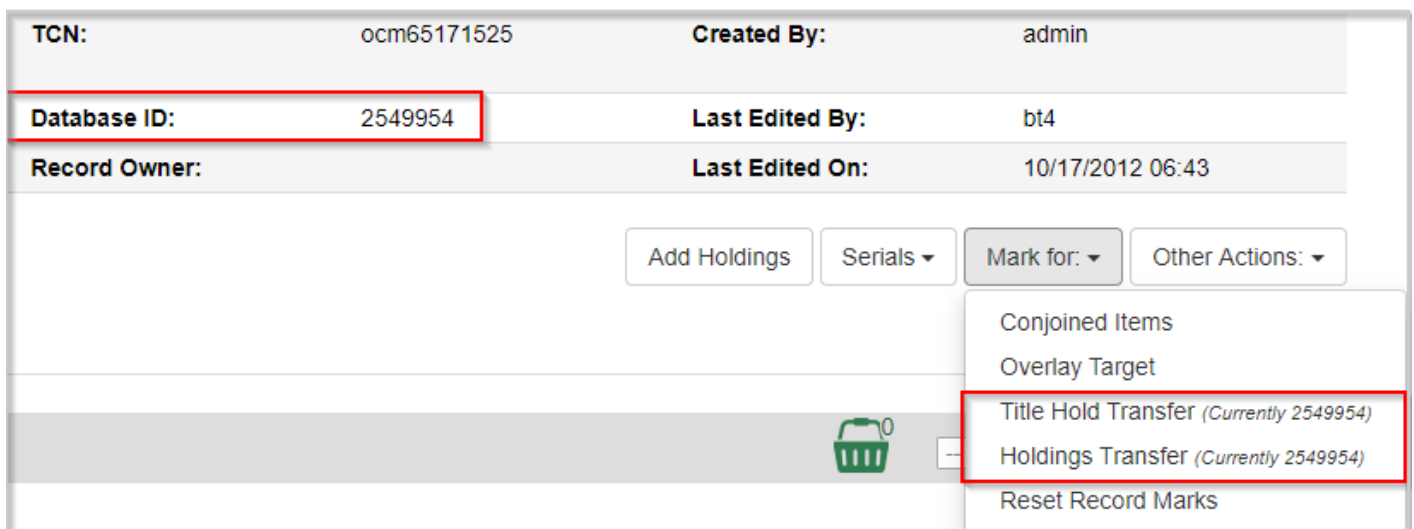


1. Locate a good OCLC record that matches your item in hand. If it does not already exist in PINES, import the record via Z39.50.
2. In your target OCLC record, click the button for **Mark For** and select both **Title Hold Transfer** and **Holdings Transfer**.



The screenshot shows the top section of an OCLC record. It includes fields for 'Created By: admin' and 'Last Edited By: bt4' with a timestamp of '10/17/2012 06:43'. Below these are buttons for 'Add Holdings', 'Serials', 'Mark for:', and 'Other Actions:'. The 'Mark for:' dropdown menu is open, showing options: 'Conjoined Items', 'Overlay Target', 'Title Hold Transfer', 'Holdings Transfer', and 'Reset Record Marks'. The 'Title Hold Transfer' and 'Holdings Transfer' options are highlighted with a red box. A green shopping cart icon with a '0' is visible below the buttons.

If you click **Mark For** again, you can confirm that you have the record marked because you will see *(Currently [recordID])* next to both options. This number will match the Database ID that you can see in the Record Summary at the top of the record.



This screenshot shows the 'Record Summary' section of the OCLC record. It includes fields for 'TCN: ocm65171525', 'Created By: admin', 'Database ID: 2549954' (highlighted with a red box), 'Last Edited By: bt4', and 'Record Owner:' with a timestamp of '10/17/2012 06:43'. Below these are buttons for 'Add Holdings', 'Serials', 'Mark for:', and 'Other Actions:'. The 'Mark for:' dropdown menu is open, showing options: 'Conjoined Items', 'Overlay Target', 'Title Hold Transfer (Currently 2549954)', 'Holdings Transfer (Currently 2549954)', and 'Reset Record Marks'. The 'Title Hold Transfer (Currently 2549954)' and 'Holdings Transfer (Currently 2549954)' options are highlighted with a red box. A green shopping cart icon with a '0' is visible below the buttons.

3. Return to your Acq record and select all your copies that you will be transferring.

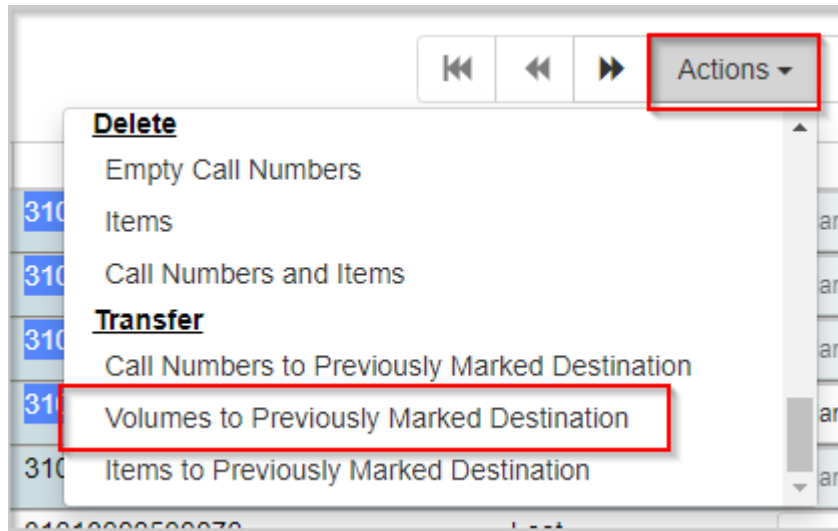


You can select multiple copies/volumes by holding down the Ctrl button on your keyboard and clicking multiple rows. You'll see the ticky boxes to the left of the rows will all be



selected.

4. Click the **Actions** button and choose **Transfer>Volumes to Previously Marked Destination**.



5. Your page should refresh, and the volumes should be gone.

Moving On-Order Holds



Follow these instructions after you've marked the destination record by doing Mark For>Title Hold Transfer (see step #2).

6. Go to the **View Holds** tab on the record and change the Pickup Library selector to your context org unit.

Author:	Rowling, J. K.	Pubdate:	2004
Bib Call #:	823/.914 Fic	Record Owner:	

Start Previous Next End Back to Results (1 / 104)

Item Table MARC Edit MARC View **View Holds** Monograph Parts Holdings View Conjoined Items Shelf Browse Patron View

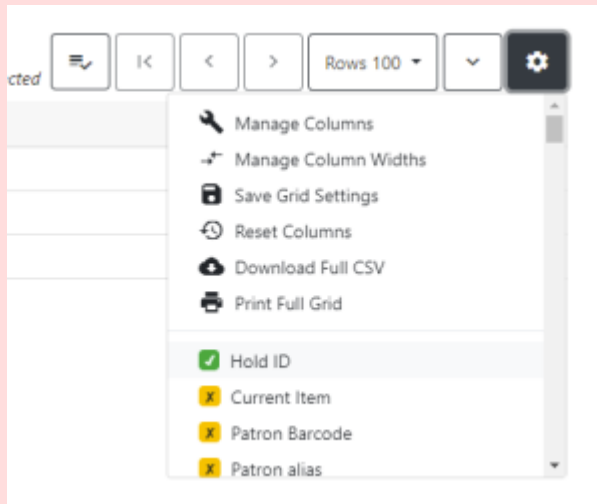
Pickup Library PINES

☒ Pre-Fetch All Holds

☐ #

7. If there are any holds on the record for your system, they will populate in the grid below. Select all of the holds.

There is currently a bug where only the line number will show in this grid if there are holds. Make sure to add at least one column from the column picker so you can see the holds.



Item Table

MARC Edit

MARC View

View Holds

Monograph Parts

Holding

Pickup Library

PINES

☒ Pre-Fetch All Holds

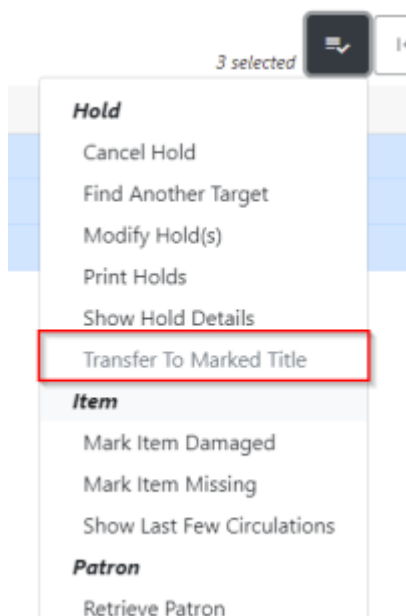
☒ # **Hold ID**

☒ 1 4751999

☒ 2 22581503

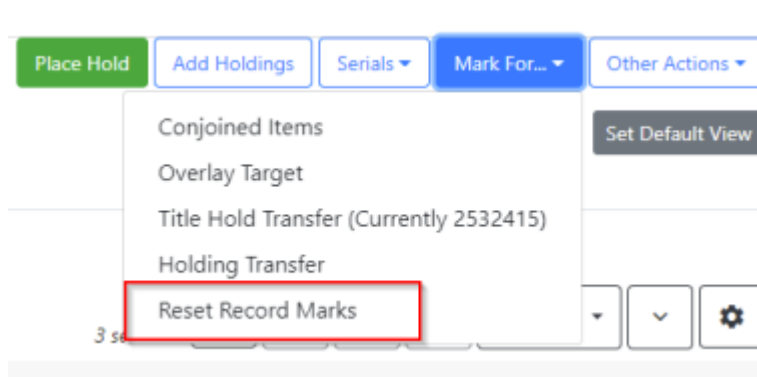
☒ 3 22812608

8. Click the **Actions** button or right-click on one of the lines and choose **Transfer to Marked Title**.



9. The page will refresh and the holds will be gone.

10. Go back to the **Mark For** button and choose **Reset Record Marks**.



<fc #ff0000>THIS IS A VERY IMPORTANT STEP!</fc> If you neglect to do this step, it is very easy to have holds and/or items moved to the incorrect record because you did not clear which record was marked. Do this **every** time before you finish with a title.

Using Vendor Cataloging

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