

## Holds Processing Cribsheet

We have had issues with staff not placing holds correctly in Sierra. This brief handout is to review the proper selections for placing “normal” holds for patrons. All holds placed in Encore are set to be Title Level.

When you are on the summary screen for the title, you want to click on the Hold Copy Returned Soonest button. This places a Title Level Hold which will be filled by the first available copy, based on hold priority settings in the system.

The screenshot shows the Sierra library system interface. At the top, there's a search bar with the keyword 'dixie hemingway'. Below that, the title 'Cat sitter on a hot tin roof : a Dixie Hemingway mystery / Blaize Clement.' is displayed. A red arrow points to the 'Hold Copy Returned Soonest' button in the 'Summary' section. Below the buttons is a table of holdings.

#	Recnum	Call Num	Barcode	Location	Due Date	Holds	Bookings
1	i44233309	M CLEMENT	31558002462604	kkgff	AVAILABLE	0	0
2	i44233358	M CLE	31984002733176	nlamy	AVAILABLE	0	0
3	i44233395	FIC CLE	31561002188922	tcafi	AVAILABLE	0	0
4	i44233425	MYSTERY CLEMENT	38510101547648	fpamy	AVAILABLE	0	0
5	i44233486	MYSTERY CLEMENT c.2	38510101593642	fpamy	AVAILABLE	0	0
6	i44233498	MYSTERY CLEMENT c.3	38510101615841	fpamy	AVAILABLE	0	0
7	i4423353x	M CLEME	35920001547627	ccafi	AVAILABLE	0	0
8	i44233607	FIC CLE (MYS)	32186001750487	frafi	AVAILABLE	0	0
9	i44233620	F CLEMENT	32077000914465	lsafi	AVAILABLE	0	0
10	i44233668	M CLE	32889002138863	hdafi	AVAILABLE	0	0
11	i44233711	FIC CLE	36800001013839	brafi	AVAILABLE	0	0
12	i44233772	MYS Fic Cle	31306000173728	srgff	AVAILABLE	0	0

**This button should be used for ALL holds.** The ONLY two exceptions are that you want to use the Hold Selected **Item** button is if you want to place a hold on YOUR LIBRARY’S item ONLY because it is checked out currently but needs to go to Technical Services when it is returned, or because it is missing and you want to have it routed to a staff member if it is checked in. Please note that we are not running Item-Level Hold paging lists, so if you make this selection, your hold will not be on a paging list. It will only be filled when the item is checked in. You should not be placing item level holds on another library’s items. You also will use slightly different procedures to place holds on multi-volume titles (see below).

### Placing Multiple Holds on the Same Title

We have also gotten numerous questions about placing multiple holds on the same title for a book club, etc. Once you have clicked on the Hold Copy Returned Soonest button, you should get the following

dialog box, and your cursor will be in the No. of Hold box which is defaulted to 1. You can order up to 99 copies of the same title by simply entering the needed number in this box.

Place a Title-level Hold

Patron: HUTCHINSON, JUDITH A p11133715

No. of Holds (1-99): 1

Pickup Location: RAILS (Coal Valley)- CVSG-9

Limit to Location:

Not Wanted Before: - -20

Not Wanted After: - -20

Hold Note:

OK Cancel

If there are available copies of the title in PrairieCat, you should then get this dialog box regarding Title Paging Options. **You should ALWAYS choose Page for Title.**

Title Paging Options

? Page for title

Do NOT page

Cancel

You will not get this box if there are no holdable copies in PrairieCat. An example is if your library does not own a new title, and all other copies are too new to borrow. However, once copies become available after the title is no longer too new, your hold will be added to a paging list.

### Placing a Hold on a Multi-Volume Title (TV series, magazines, etc) in Sierra in Search/Holds

To place a hold on a multi-volume title, you need to add the step of selecting the desired volume. First, search the title in Search/Holds. On the Summary screen, select the desired volume. Click on the Volume-Level Holds tab.

b18087607

Title The closer. The complete first season [videorecording].

Publication Info. Burbank, CA : Warner Home Video, [2006]

Standard No. 141983049X

Standard No. 012569806405

Standard No. 80640 Warner Home Video

Summary

Record j11754898

View | Volume

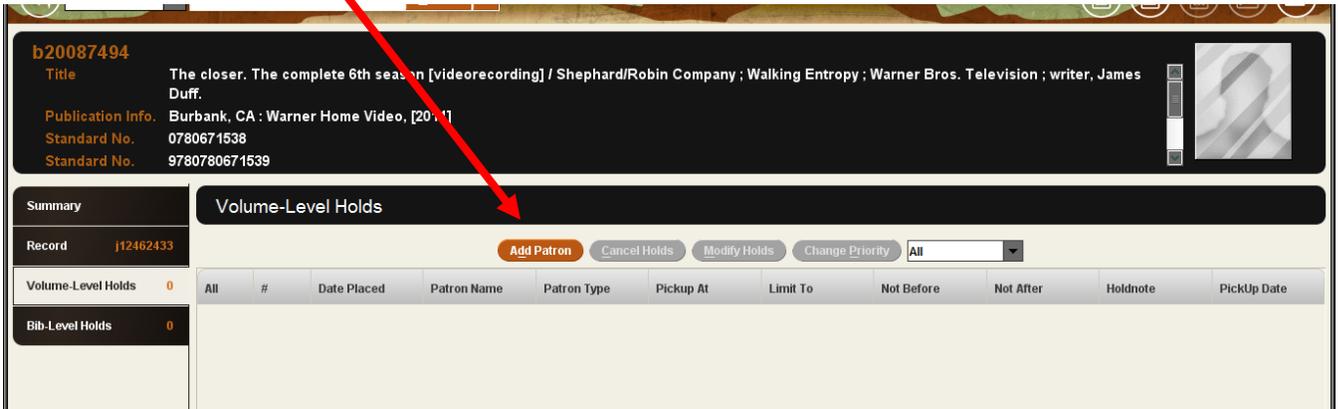
Attach New Volume Delete Move Select

#	Record Number	Volume Statement
✓ 1	j11754898	DISC 1-4

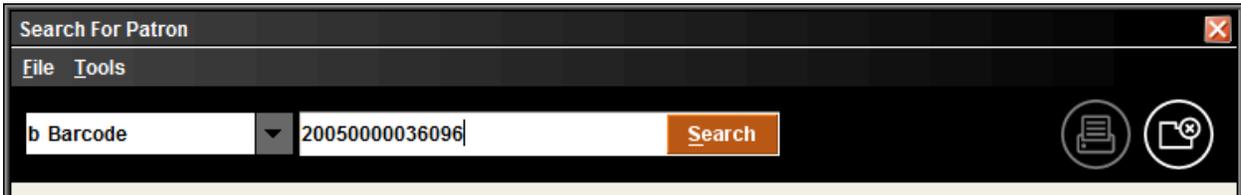
Volume-Level Holds 0

Bib-Level Holds 0

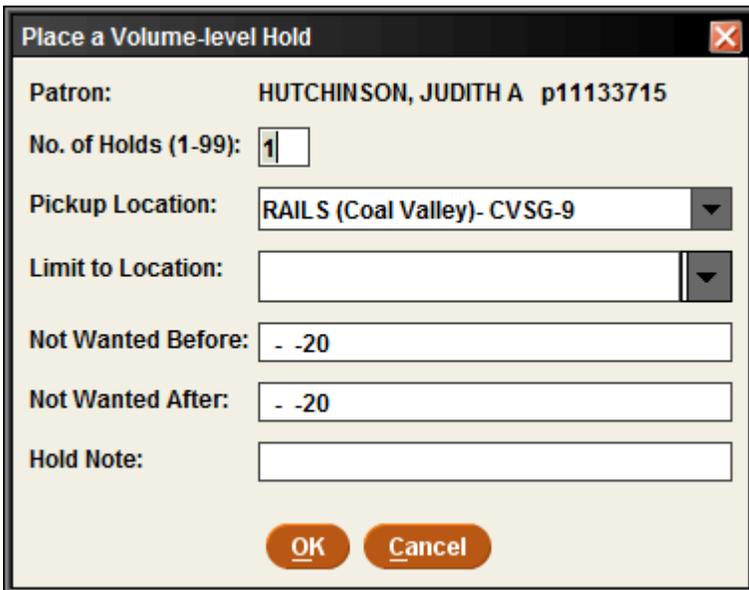
Then, click on the Add Patron button:



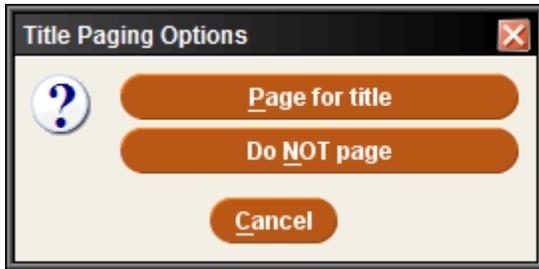
Search the patron by name, barcode, etc:



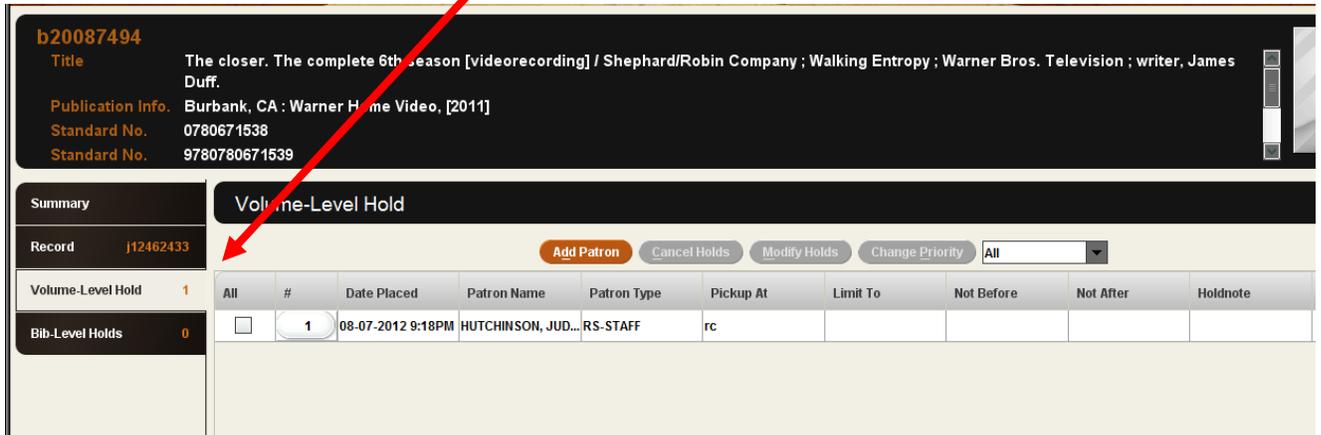
Then complete the hold details in the Place a Volume-Level Hold dialogue box:



and select Page for title:

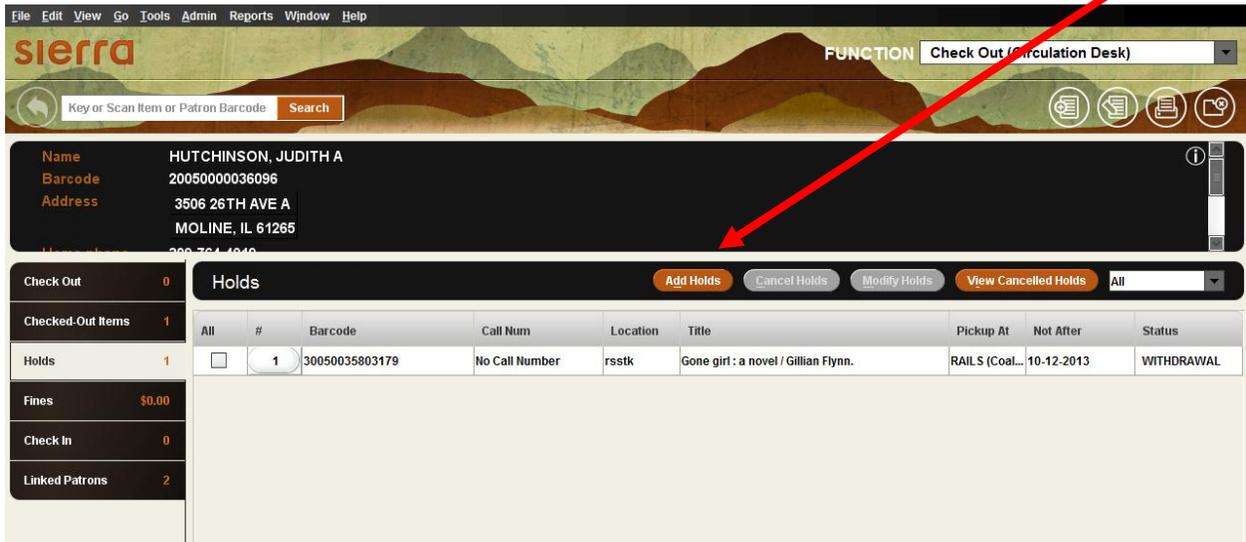


You should now see your Volume-Level hold in the record:

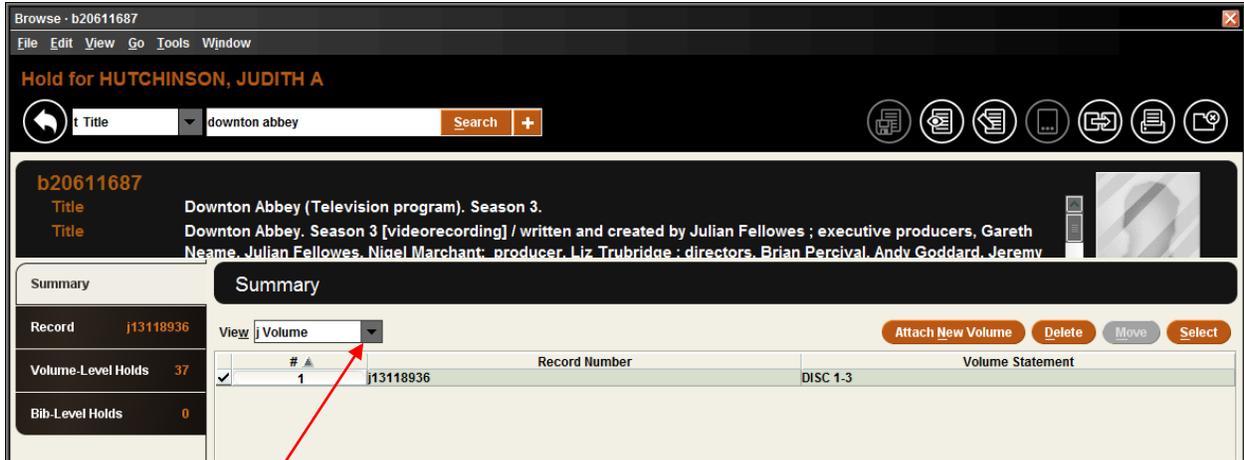


### Placing a Hold on a Multi-Volume Title (TV series, magazines, etc) in Sierra starting from the patron record

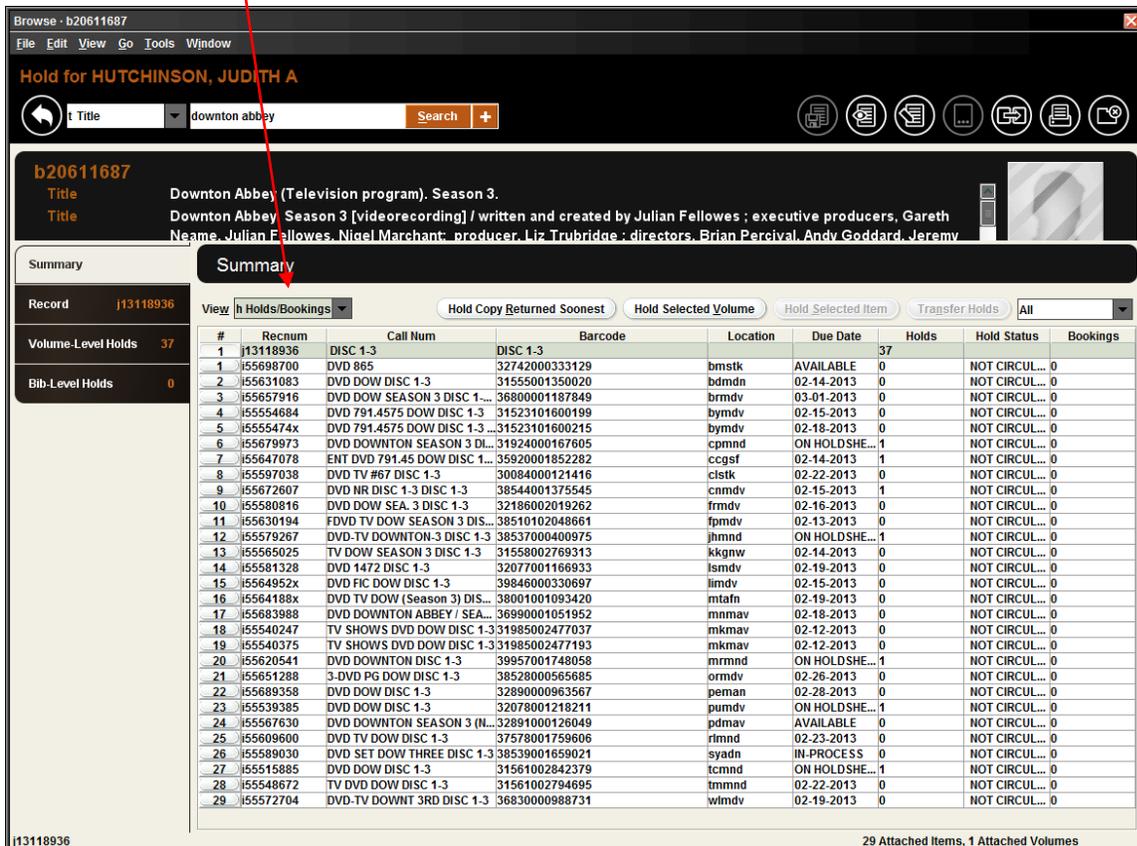
To place a hold on a multi-volume title, you need to add the step of selecting the desired volume. First, search the patron record in Checkout (Circulation Desk). Click on the Holds tab and then select Add Hold



Search for the title that the patron is requesting. Once you have selected a record, the summary screen will display. For a multi-volume record, you should be on the summary screen which displays the available volumes:



Next, pull down the View menu to switch the View to Holds/Bookings and this screen will display:



From this screen, it is important that you make sure the correct volume is selected (highlighted). **Do not select an item!**

- Click on the volume record for the specific part that you want to request.
- Please note that volume records have a “j” in front of the record number, while an item has an “i” in front. Again, do not select an item! You will know that you have erroneously selected an item if the Hold Selected Item button becomes available.
- In the example above, there is only volume to choose. However, when searching a magazine or any multi-volume work with more volumes, it is important to be sure the correct volume is selected. When you first display the Holds/Booking screen for a multi-volume item, the first volume on the list will be highlighted, so you need to consciously scroll down and choose the volume you want.
- Here’s an example of the screen from a magazine with a specific volume further down the list selected/highlighted:

**Hold for HUTCHINSON, JUDITH A**

Periodical Title: sports illustrated

**b20380665**  
 Title: Sports Illustrated.  
 Publication Info. [New York, NY, etc., Time]  
 Standard No. 0038-822X 0038-822X 1  
 Locations bh , bd , br , by , cc , cl , co , cn , dk , ea , ej , fl , fr , fg , fp , gp , gv , hc , hd , kk , ls , mt , mn , ms , mk , mv , mr , nl , or , pt , pe , pu , pd , po , pr , rl , ro , sa , zzzzz, sn , sb , sy , tc , tm , wl , yk

**Summary**

Record: j13118948

View: h Holds/Bookings

Hold Copy Returned Soonest | **Hold Selected Volume** | Hold Selected Item | Transfer Holds | All

#	Recnum	Call Num	Barcode	Location	Due Date	Holds	Hold Status	Bookings
315	j13083595	SEP 24, 2012	SEP 24, 2012			0		
316	j13095592	OCT 1, 2012	OCT 1, 2012			0		
317	j13070009	OCT 8, 2012	OCT 8, 2012			0		
318	j1307183x	OCT 15, 2012	OCT 15, 2012			0		
319	j13078495	OCT 22, 2012	OCT 22, 2012			0		
320	j1308169x	OCT 29, 2012	OCT 29, 2012			0		
321	j1308477x	NOV 5, 2012	NOV 5, 2012			0		
322	j13087940	NOV 12, 2012	NOV 12, 2012			0		
323	j13090124	NOV 19, 2012	NOV 19, 2012			0		
324	j13094087	NOV 26, 2012	NOV 26, 2012			0		
325	j1309659x	DEC 3, 2012	DEC 3, 2012			0		
326	j13098999	DEC 10, 2012	DEC 10, 2012			0		
327	j13102989	DEC 17, 2012	DEC 17, 2012			0		
328	j1310648x	DEC 24, 2012	DEC 24, 2012			0		
329	j13108220	DEC 31, 2012	DEC 31, 2012			0		
330	j1311315x	JAN 14, 2013	JAN 14, 2013			0		
331	j13115808	JAN 21, 2013	JAN 21, 2013			0		
332	j13118948	JAN 28, 2013	JAN 28, 2013			0		
333	j13121911	FEB 4, 2013	FEB 4, 2013			0		
334	j13123786	FEB 4, 2013 SUPPL	FEB 4, 2013 SUPPL			0		
335	j13124481	FEB 11, 2013	FEB 11, 2013			0		
336	j1312741x	FEB 18, 2013	FEB 18, 2013			0		
337	j13127421	WIN 2013	WIN 2013			0		
1	i53490563	Periodical Shelves DEC 27, 19...	30050045913638	bhlf	LIB USE ONLY	0	FOR LIBRARY...	0
2	i5350964x	MAG V. 116 NO. 1 JAN 9, 2012...	31555001304985	bdgpe	AVAILABLE	0	NOT CIRCUL...	0
3	i53510008	MAG V. 116 NO. 2 JAN 16, 201...	31555001306121	bdgpe	AVAILABLE	0	NOT CIRCUL...	0
4	i53510343	MAG V. 116 NO. 3 JAN 23, 201...	31555001306402	bdgpe	AVAILABLE	0	NOT CIRCUL...	0

3289 Attached Items, 337 Attached Volumes

Next, click on the Hold Selected Volume button. Then, complete the rest of the holds process as normal, indicating pickup point and selecting Page for Title when prompted:

**Place a Volume-level Hold** 

Patron: HUTCHINSON, JUDITH A p11133715

No. of Holds (1-99):

Pickup Location:  

Limit to Location:  

Not Wanted Before:

Not Wanted After:

Hold Note:

**Title Paging Options** 

