

**Date:** May 22, 2015  
**To:** SWAN Member Library Directors and Administrators  
**CC:** Library Department Managers, Library Staff  
**From:** Kate Boyle, SWAN Member Services Manager  
**Re:** Migration Memo #21: Holds Update

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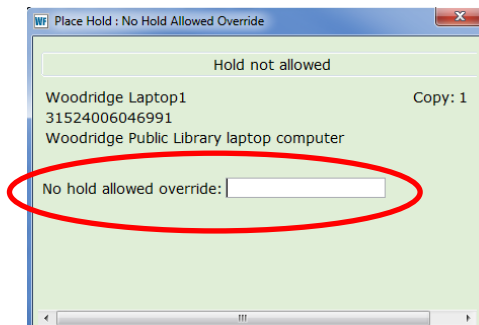
What follows is information we have gleaned about holds from tickets you have sent in to our office recently.

### Holds abnormal behavior

Last week, SirsiDynix staff identified a problem isolated to the settings in the profiles of two libraries. This setting is referred to as the “Recirculate flag”. Unfortunately, this flag had the potential to impact any items that were processed by those two libraries. What resulted were some unexpected behaviors at SWAN libraries: items arriving at libraries already checked out to the patron, items returning to libraries to fill a hold once again for the previous patron, weird hold queue displays, etc. This problem has since been fixed.

### Holds on Non-Holdable items

Libraries have been receiving requests for materials that would not normally circulate to the patron requesting the item. This can be due to a Circulation Rule/ Circulation Map that needs tweaking. However, more and more we observe this behavior as the result of staff placing a hold with an override when the item is not holdable. If Workflows prompts you for the “No hold allowed override” when attempting to place a hold, the software is telling you that there are no holdable items attached to the record.



If you enter an override at this point in Workflows when placing a hold, the software now ignores all rules and the hold becomes what SirsiDynix refers to as a NO HOLDS BARRED hold. This will cause the software to “go rogue” and request the item from any library that owns a non-holdable copy attached to that record. SWAN has decided to curtail this override activity by creating a new unique override password for this particular circumstance. This new override password will be effective as of Wednesday, May 27<sup>th</sup> and is available on the Director’s Area page of the SWAN website <https://support.swanlibraries.net/content/directors-area-special-access>. In the future, if you should need a particular copy of a title and are prompted for a hold override:

- please call the owning library to request a loan of the item
- If approved by the owning library, place a **copy** hold
- when prompted use the new override.

We are requesting the use of this password be restricted to Circulation supervisors. Please do not share the new override password with general Circulation staff.

### Clean Holds Shelf report

Good news --for those libraries that reported there is a timing issue with the Clean Holds Shelf report being run hours before staff have time to process the hold shelf. We have created a new login to the reports module – “Report/Report”, which will become effective on Wednesday, May 27<sup>th</sup>. One of the templates assigned to the new login will be the Clean Holds Shelf report.

At present, the following templates are assigned to this new login:

Report name »	Source
High Demand Holds	holdtocopies
Item Statistics	itemstat
List Call Number Records	calllist
List Inventory by Item Number	invlist
List Items	itemlist
Monthly Circ by Item Type/Item Cat2	statistics

We will be adding more new templates on Tuesday, including the Clean Holds Shelf report. This will empower libraries to run this report when they are ready to process the hold shelf. When using these templates for the first time, the template should be copied and renamed with the specific library three letter code. Ownership of the report must be updated also. It is our intent to create more reports for the libraries to use with the Report/Report login as we move forward. More specific documentation will be distributed next week on this new process. If you decide you do not want to run the Clean Holds Shelf report and prefer to have SWAN continue to run this report for you, please send us a ticket. Remember, the Clean Holds Shelf report must be run at least Monday through Friday. As you start to run your own reports, remember we are asking members to only run reports between the hours of 9 AM and 6 PM.

### Processing holds for non-SWAN libraries

**As a reminder, there are a number of Non-SWAN libraries that place holds on SWAN using a generic user ID.** These include our enhanced access libraries, internet access libraries, and Share Illinois libraries. When you checkin an item and generate one of their holds or scan an item to fill their hold, the screen displays as below. When the screen says route/transit to ILL\_LIBS and you are sending the item, you must **“Put Item in Transit”** and **CHECK THE ITEM OUT TO THE USER ID.** Then address the routing label using the information on the screen TO: XXX (see below MKS) FOR: XXXXX (see below Bremen HS 228). [Please see documentation on the SWAN website for more information.](#)

