



## How Holds Work Guide

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### Important Terminology

**Local Hold:** A hold placed on an item on your shelf by your patron.

**System Hold:** A hold placed on any item on one bib record.

**Interlibrary loan:** A hold placed on an item by a patron or library outside RSA. For more information on this process, please see the [Items Requested by a Non-RSA Library Procedure](#).

**Copy Level Hold:** A hold that is placed on one specific item and no other item will fill it.

**Title Level Hold:** A hold that is placed on any item on a Bib Record of the item selected for the hold, not a specific Item ID.

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Holds rely on several parameters to work. For a hold to be successfully placed, all the rules must allow the hold. Here is a quick overview of what the system is looking for to allow a hold.

- Title level holds look at all items on the BIB RECORD of the item ID provided when the hold was placed, not at the specific item ID used. Any holdable item on that bib record can fulfill the hold. Workflows defaults to Title Level Holds.
- Copy level holds look ONLY at the item ID given when placing the hold. NO OTHER COPY OF THE TITLE CAN FILL THE HOLD even if multiple other copies are available. This is why it is important to pull the item ID found on the picklist and not just the same title.

Steps WorkFlows uses when a hold is placed:

1. Can the patron checkout the item in their library or the hold pickup library (if different from their home library)?
  - a. If the circ rules for the checkout library (user library or pickup library) would allow the patron to check the item out, the system continues to look at the hold. If not, the hold fails at this point.
  - b. At this point, it is a simple decision based on item type and user type. If

- your JUV cards are blocked from checking out item type DVD, then all DVD item type holds would be blocked.
- c. Since not all libraries use the same item types for each item, by default, all item types are allowed to be checked out by all user profiles in all libraries. If this were not allowed, your patrons would only be allowed to checkout the item types used in your library. If you used item type BOOK for all book items, not allowing all item types would mean no holds on BOOK-PBK, BOOK-LPRNT, etc.
  - d. Item checkout limits also affect the number of holds a patron can have filled. If a patron is limited to 5 DVD checkouts, then the system will not transit an item to fill a DVD hold unless the patron has an available checkout (4 or less DVDs checked out).
2. Can the patron checkout the item from any of the libraries on the selected bib record (if title level hold) or the selected library for copy level holds? This is based on two Holds Groups.
- a. By default, school/academic libraries can borrow from other school/academic libraries and public libraries can borrow from other public libraries. By default, there are no holds allowed between school/academics and public libraries.
  - b. Allowing all libraries to borrow your materials does not allow your patrons to borrow from all other libraries. The rules are based on each library's wishes.
  - c. The RSA Website (on the [Membership List page](#)) has a complete and up-to-date listing of each RSA member library's holds group; Public, School/Academic, or All.
  - d. "Hold Not Allowed" cannot be overridden. These hold groups are the master gatekeepers for who borrows from whom. Please consider allowing holds to all libraries if you can. The more libraries that allow anybody to hold their items the better.
3. Are any of the remaining items being considered blocked by the holds map?
- a. The final act of the holds process is running through the hold map.
  - b. The hold map works by library, item type, and user profile. It is a blocking map meaning that all items can be held by default but can be blocked specifically.
  - c. The most blocked item types are the NEW item types (N-BK, N-DVD, etc.).
  - d. Some libraries only allow local holds for certain items like new items, kits, equipment like hotspots, and Library of Things. Holds on these items can only be placed by patrons of the item-owning library. The patron can choose a different pickup library. If they do, and you don't transit those items, then the item-owning library needs to contact the patron.
  - e. The RSA Library Staff Support Site, System Info and Support section, Systems Parameters page, has a current listing of the holds map. You

can use it to see what libraries are blocking individual item types.

At this point the system has looked at the patron to see if they can checkout the item (not blocked or barred and can legally check out the item), then looked to see if the item (copy level) or items (title level) were available to be held and removed all items in libraries not in the patron's holds group. Then the system filters one last time by the holds map and selects an item to fill the hold from the remaining eligible items.

Examples using the item: Harry Potter and the Deadly Computer Virus held by 10 public libraries and 10 school libraries.

This scenario will assume the patron can check the item out in their library.

In this case, all the school items would be eligible and only those items in public libraries that allowed all libraries to borrow from them. Then the hold would be filtered by the holds map to remove items at individual libraries. Then of the items left, one would be randomly chosen to fill the hold.

The same scenarios would work if the patron were from a public library. The difference would be that items held by schools would be removed from consideration unless the school allowed holds from all libraries.

4. Once the hold is placed, it will appear on the selected library's picklist after the next run of the pick list. The hold will remain on that picklist until the library pulls the item and traps the hold or checks the item out to another patron or marks the item as lost or missing. However, if another library checks in an item on the same bib record as that hold, the system will try to grab and transit that item to fill the hold quicker. The item would then be removed from the next run of the pick list.

Contact the RSA Help Desk at [help@rsanfp.org](mailto:help@rsanfp.org) or at 866-940-4083.