Switching from Item-level to Title-level holds: What could go wrong?

Kelly Kobiela
Marquette University
kelly.kobiela@marquette.edu
Introduction

- Marquette University
  - Private Jesuit University
  - 8,400+ undergraduates, 3,200 graduate
  - 83 majors, 68 doctoral and masters programs
  - 30 librarians, 30 staff
    - 5 person Library IT team

- Prior to my start in February 2018 work had started on a Patron Functionality API in EBSCO Discovery Service

- The API needs Title-level holds; we had Item-level holds
Item-level Holds

- Raynor Memorial Library had always had Item-level holds
  - Law Library did not do holds
    - Holds inadvertently happened due to a bug in Sierra 3.4

- The set up is much easier with Item-level holds
  - Patrons select the exact item so no need for priority paging or settings about which library is or is not paged

- The user experience is worse
  - There is an extra step to put the hold
  - Student may put a hold on a copy that is not the copy that gets returned soonest
Changing to Title-level holds

- Steps we took before changing anything:
  - Read everything I could find
  - Emailed a list of questions to Innovative
  - Met with Laura Frasca at IUG
  - Emailed Laura a list of questions
    - Laura’s answers were very detailed and really helped us understand everything

- Time line:
  - Started work in February
  - Kept pushing the date as we had more and more questions
  - Had staff start testing Title-level holds the end of June
  - Went live to the public beginning of August
Changing to Title-level holds

- Work involved
  - Change REQUEST from item to title

REQUEST[scope][_lang]

This option controls the offering of the REQUEST this item option. The syntax for this option is:

REQUEST=[Option Text][Hold Level][Pickup Location][NNA Date]

- We changed Holds - Title level even if only one copy to Yes

044 > Holds: Print Hold cancel notice when cancelling hold. ................. ASK
045 > Holds: Title level hold even if only one copy. ...................... YES
046 > Holds: Display barcode of items on holdshelf. ..................... NO
Changing to Title-level holds

- Have Innovative enable title priority paging
Title-level hold issues - the Law Library

- Law had never done holds/requests, which no one at Raynor Library knew

- A bug in Sierra allowed holds for Law

- They decided that they would try holds as we switched to Title-level holds
  - Ran a pilot test over the summer and ended up staying with holds/requests

- Biggest issue - their printers weren’t set up to handle the notices
Title-level hold issues - Notices

- Problem: Law Library notices would not print - getting a postscript error
- What was happening: Sierra notices use A4 paper size; the departmental printers were not set up to handle that conversion to letter size
- Solution: Add a PCL driver to the printer

- Note: when they received a new printer this summer, the postscript errors started again, even with the PCL license on the printer
- A separate print queue was created to sent it to PCL printing
Title-level hold issues - Paging for law

- Problem: Not all requests submitted from WebPac were showing up on the Title-paging List

- What was happening: Some of the Loan Rules had “Home library pickup” set to yes, which apparently conflicts with having title-level holds set to item location pickup. (found on a listserv)

- Solution: Change Home Pickup to No
Title-level hold issues - Paging timing

Problem: The Law library was having items not show up on the Title-paging list that were placed over the weekend; longer breaks had Raynor and Law requests not showing up on the Title-paging list; requests were ending up in the View Outstanding Holds file (into a void)

What was happening: The amount of time before a hold transferred was one day; Law does not page over the weekend; we don’t do hold transfers

Solution: Change option to 84 hours before transfer (View Outstanding Holds)
Title-level hold issues - Pickup location

- Problem: We did not want material to be sent to the other library; even though we had the Pickup location set to Item location, things were still being marked as In Transit.
- What was happening: Not really sure...
- Solution: Innovative enabled the feature “Pickup at Item Location.”

---

### Pickup at Item Location

If the Pickup at Item Location feature is enabled, the system does not allow a pickup location to be specified for title- or volume-level holds. Instead, the system automatically assigns a blank pickup location to title- and volume-level holds. When an item becomes available that can satisfy the title- or volume-level hold, the item’s LOCATION becomes the pickup location.

**Enabling the Feature**

To have the Pickup at Item Location feature enabled at your library, contact Innovative.

**Compatibility with Other Features**

This feature overrides the Page Pickup Location First feature. When both the Pickup at Item Location and Page Pickup Location First features are enabled, the system does not allow a pickup location to be specified for title-level holds.
Title-level hold issues - Pickup location

INNOPAC SYSTEM OPTIONS (OPAC options)
18 > Requests: Pickup location.......................................LOCATIONS SERVED
19 > Requests: Patron eligibility determined by.........................P TYPE
20 > Requests: Eligible patrons...........................................1,3-12,14-17,23,72
21 > Requests: Message for patrons denied access...............Choose to view
22 > Requests: Amount to charge........................................NOT SET
23 > Requests: Message to agree to charge.............................N/A
01 > Exit and return to main menu: Select 1-5 for additional

Requests: Pickup location
Current Value: LOCATIONS SERVED

1 > Use item location
2 > Use patron home library
3 > Use locations served list
4 > Ask
5 > Return to previous menu

Choose one: (1-5)
Title-level hold issues - AirPac

- Problem: After setting everything up and having it work, we had a few item holds come in from a faculty member
- What was happening: AirPac has separate Web Options for holds
- Solution: Opened support ticket to have Innovative update the Web Option in AirPac to the same as WebPac
Title-level hold issues - Outstanding holds

- Problem: View Outstanding Holds file not showing all outstanding holds when viewing by Pickup Location
- What was happening: Title-level holds do not have their Pickup Location assigned until the item has been paged/picked up.
- Solution: Pickup Location = All
  - However, this does cause another problem of not being able to sort MEM-SCI from LAW without manually looking through every row.
Title-level hold issues - Storage

- Problem: We have items in off-site storage that were labeled as “Ask at Circ”, which made them not requestable.
- What was happening: Items can only be requested if they are status “Available”.
- Solution: We changed the status of all storage items to “Available” and assume that the Location being “Storage” will indicate to patrons not to go looking for it in the stacks.
Title-level hold issues - Recalls

- Problem: Items were being recalled but then there was no hold on the title
- What was happening: Once someone puts a hold on a title, at least one item is recalled; if the hold is cancelled or otherwise filled, the recall is still active
- Solution: We confirmed that the recalled items had cancelled holds and were not being recalled incorrectly and found that the system was acting as expected
What problems do you have with holds?
What solutions have you found to deal with hold/request issues?
What questions do you have that we can all troubleshoot together?
Any holds complaints to air out?
Are you planning on switching from item to title or vice versa?

Other questions?