REPORTS & OTHER SHINY THINGS

Mike McClellan Senior Library Consultant
Agenda

- New Features with Sierra 2.0
- Reports
- Circulation Features
Sticky Status

- **Use case:** reference status “o” item gets a temporary status change like mending, damaged, binding etc.

- **Problem:** checking in the item resets the status back to “-” as Sierra forgets it was reference (o) to begin with.

- **Solution:** a new fixed field called Sticky Status. (can be renamed but is a consortia decision)

- Stores the original “o” value.
Sticky Status

<table>
<thead>
<tr>
<th>Copy No.</th>
<th>Item Code 1</th>
<th>Item Code 2</th>
<th>Item Type</th>
<th>Price</th>
<th>Checkout Date</th>
<th>Checkout Location</th>
<th>Due Date</th>
<th>Patron No.</th>
<th>Last Patron</th>
<th>Last Checkin</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>1 NONFICTION</td>
<td>6 REF-BOOK</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Inventory Date</th>
<th>Checkin Location</th>
<th>No. of Renewals</th>
<th>No. of Overdues</th>
<th>Overdue Date</th>
<th>Item Use 3</th>
<th>Recall Date</th>
<th>Total Checkouts</th>
<th>Total Renewals</th>
<th>Last Checkout Date</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Loanrule</th>
<th>Status</th>
<th>Internal Use</th>
<th>Copy Use</th>
<th>Item Message</th>
<th>OPAC Message</th>
<th>Year-to-Date Circ</th>
<th>Last Year Circ</th>
<th>Item Agency</th>
<th>Sticky Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0 Lib Use Only</td>
</tr>
</tbody>
</table>

Last Updated: 02-01-2015  Created: 02-01-2015  Revisions: 1

[i1036828x]
Sticky Status

How to implement:

1. Create list of all reference items
2. Use rapid update/global update to set sticky status to “o”
3. Update item creation templates to either set or prompt to set “o” sticky status for new reference items
Damaged Items

- Use Case: give us a *Lost Books* like workflow for Damaged material so we can change status and possibly add a charge without editing the item.

- Requires: a “damaged” item status code which is “g” at Marmot.

- New option under Checked out books in Circulation Desk mode.

- Can assess a manual charge or just change the status.

- Copies the 245 title field and barcode into the manual charge description which you can edit.

- Note: unlike “lost books” this doesn’t checkin the item. Workflow is to follow damaged steps and then checkin item. Answering “No” to the “do you want to update status to “-” prompt.
# Mark Damaged Items

![Image of library system interface](image.png)

### Checked-Out Items

<table>
<thead>
<tr>
<th>All</th>
<th>#</th>
<th>Barcode</th>
<th>Call Num</th>
<th>Location</th>
<th>Title</th>
<th>Due Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>3060000051145</td>
<td>rtzi</td>
<td>rtzi</td>
<td>Mike ILL test</td>
<td>03-13-2015</td>
<td>OVERDUE</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>3060000051152</td>
<td>rtzi</td>
<td>rtzi</td>
<td>Mike ILL test</td>
<td>03-06-2015</td>
<td>OVERDUE</td>
</tr>
<tr>
<td>✓</td>
<td>3</td>
<td>30604002128976</td>
<td>FICTION McClell</td>
<td>bnaf</td>
<td>Magic carpet ride : a Scottish island novel / by Audrey ...</td>
<td>03-12-2015</td>
<td>OVERDUE</td>
</tr>
</tbody>
</table>
Mark Damaged Items

(1) Mark Damage – not patron’s fault so no charge and item status is now damaged
(2) Mark Damaged and Add Charge to create manual charge and status change
Marked Damaged

Still checked out but marked with your damaged item Status
Next: Check in to clear from patron’s record but don’t change the Status

Possible problem with items that don’t belong to your library going into “t” Transit instead of retaining Damaged status.
Mark Damaged and Charge

- Manual Charge
- Can change amount from default replacement from item record to a partial charge
- Can use a predefined charge instead
- If no default price in item record then Amount will be $0.00 and needs to be updated (doesn’t use loan rule default price)
- Can edit the “Reason”
- Location is item location code
Expired Card Warning

- Set in Options: Patron Display
- Admin App or Admin Options within Sierra SDA
- Also appears for already expired accounts

Use Case: warn us when a patron record is going to expire soon
## Running Count of Checkins

<table>
<thead>
<tr>
<th>Patron Name</th>
<th>Amount Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>McClellan, Mike</td>
<td></td>
</tr>
<tr>
<td>McClellan, Pebbles</td>
<td></td>
</tr>
</tbody>
</table>

Checkin (no patron) - not currently in Check in (Circulation Desk)

Easier to verify RFID pad checkins
Print Templates: Due Date Slips

Would require “graphics capable” receipt printer
Print Templates: Receipts
Total fines on Charges Printout

- Fines tab
- Select fines (outstanding charges)
- Click on print icon or right click and print table
- No formatting options such as replacing “fines”

<table>
<thead>
<tr>
<th>Status</th>
<th>Title</th>
<th>Location</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remaining</td>
<td>Lost Watership Down. yapfi</td>
<td></td>
<td>$9.00</td>
</tr>
<tr>
<td>Lost Watership Down.</td>
<td>yapfi</td>
<td></td>
<td>$10.50</td>
</tr>
<tr>
<td>Lost Cat / R.L. Stine.</td>
<td>bypse</td>
<td></td>
<td>$23.99</td>
</tr>
<tr>
<td>Lost Cat [videorecording] / a co-production of BBC fjvnf</td>
<td>$29.95</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wildvision, BBC Lionheart Television</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total outstanding fines: $73.44
New Payment Note when Adjusting Charges

<table>
<thead>
<tr>
<th>Detail</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice: 42056</td>
<td>Total: $0.65</td>
</tr>
<tr>
<td>Charge Type: Overdue</td>
<td>Previous Paid: -$0.00</td>
</tr>
<tr>
<td>Call Number: [aFICTION McClellan]</td>
<td>Amount Paid: -$0.00</td>
</tr>
<tr>
<td>Author: McClellan, Audrey (Audrey Phillips)</td>
<td>Amount Due: $0.65</td>
</tr>
<tr>
<td>Barcode: 30604002128976</td>
<td></td>
</tr>
<tr>
<td>Description: Magic carpet ride: a Scottish island novel / by Audrey McClellan.</td>
<td></td>
</tr>
<tr>
<td>Charge Location: bnaf</td>
<td></td>
</tr>
<tr>
<td>Statistics Group: 0</td>
<td></td>
</tr>
<tr>
<td>Checkout Date: 02-19-2015</td>
<td></td>
</tr>
<tr>
<td>Due Date: 03-12-2015</td>
<td></td>
</tr>
<tr>
<td>Assessed Date: 03-27-2015</td>
<td></td>
</tr>
<tr>
<td>Date Paid: 03-27-2015</td>
<td></td>
</tr>
<tr>
<td>Payment Status: Adjustment</td>
<td></td>
</tr>
<tr>
<td>Payment Type:</td>
<td></td>
</tr>
<tr>
<td>Payment Note: adjusted due to snow day</td>
<td></td>
</tr>
<tr>
<td>Login: mcm</td>
<td></td>
</tr>
</tbody>
</table>

Fines tab
Highlight fine
Right click
Must adjust fine for Payment note to become active
No more Auto Fill Birthday “19”
Reports

- Clear the Holdshelf
- View Outstanding Holds
- High Demand Holds
- Purchase Alerts
- Fines Paid
Clear the Holdshelf

- Checks the virtual holdshelf for holds that:
  - Never picked up
  - Library never filled

<table>
<thead>
<tr>
<th>Title</th>
<th>Call Num</th>
<th>Barcode</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red kayak / Priscilla Cummings.</td>
<td>YF CUM bayf</td>
<td>1440002430761</td>
<td>CHECK IN</td>
</tr>
<tr>
<td>Caribbean style / by Suzanne Slesin ... [et al.]; photographs by Gilles de Chabaneix.</td>
<td>747.2 SLE(Staff Retrieval) srnfa</td>
<td>3482600009493</td>
<td>PICKUP TIME EXPIRED</td>
</tr>
<tr>
<td>Get behind me Satan [sound recording (CD)] / White Stripes.</td>
<td>No Call Num</td>
<td></td>
<td>HOLD EXPIRED</td>
</tr>
<tr>
<td>The new seed-starters handbook / by Nancy Bubel; illustrations by Frank Fretz; photographs by Alison,...</td>
<td>635.94 Bub gugnf</td>
<td>127000472340</td>
<td>HOLD EXPIRED</td>
</tr>
</tbody>
</table>
Clear the Holdshelf

- Important to run on a regular basis to keep the virtual holdshelf and actual holdshelf in sync
- And for batch deletes old holds must die
- Report can be Viewed first to see what will happen if Cleared
- But has to be Cleared eventually
- Will indicate what needs to happen
  - Checkin
  - Reshelve
Changing Hold Pickup By

- Patron asks for extension
- Must be changed before Clear Holdshelf is run
- Modify hold through the patron record
  - Can’t be done within the report

![Individually Modify Holds](image)
### View Outstanding Holds

**Not in Real Time** – holds as of previous day  
**Shows** holds based on Pickup Location – what “your patrons” are requesting  
Use the sorts above the column headers such as Date Placed to identify pages that were never filled.  
Use the toggles such as Hold Status/Item Status and Call Number/Barcode  
Can print to email printer to copy into Excel

<table>
<thead>
<tr>
<th>#</th>
<th>Date Placed</th>
<th>Not Needed After</th>
<th>Patron Info</th>
<th>TITLE</th>
<th>CALL #</th>
<th>LOCATION</th>
<th>Pickup Location</th>
<th>Hold Status</th>
</tr>
</thead>
</table>
| 1  | 02-03-2015  | 08-04-2015       | INGRAM CHARLIE  
p4532591  
cmh5840@gmail.com  
843 810-3409 CEL  | Alaska        | No Call Num    | thw     | Bib hold, 1 attached Item with 1 of 1 holds |            |
| 2  | 04-23-2015  | 10-23-2015       | KINGSFORD, BRIAN  
JOCelyn  
bob tyler easha luba  
p1610321  
kingsford.brian@yahoo.com | Almost acoustic [sound recording]: reco | No Call Num  | thw  | Bib hold, 1 attached Item with 1 of 1 holds |            |
| 3  | 04-06-2015  | 10-06-2015       | ROSS CARRIE & GERRY  
p1249740  
CRE@TELLURIDEARCHITECT.COM | Bending sticks : the sculpture of Patric | No Call Num  | thw  | Bib hold, 1 attached Item with 1 of 1 holds |            |
Sorted by Date Placed to see oldest holds
Toggle to Item Status
Holds #1, 2, 3 are bib level holds. Right click to see option to view bib record
Hold # 4 is an item hold that was never pulled and should have expired based on Not Needed After date but that requires running clear the holdshelf
Hold # 5 is an outstanding item hold
Hold #1 a bib level hold
Item 1 was presumably paged and not trapped
Items 2-3 are reference only

Based on age of this hold, probably should be canceled. Can’t be done through report.
Use a separate Sierra or note the details to cancel later.
Or the library could be contacted to checkin the circulating item to trap the hold
High Demand Holds

- Evolution of Purchase alerts which failed to include bibs with holds but no items (on order)
- Must be set up with a “threshold”
- Based on pickup location
  - Your patrons
  - No option to combine libraries in a multi branch
- Not real time | reflects as of yesterday
- Decision Center incorporates options to report on waiting time or desired ratio
With preference to “local holds” set, important to note number of local items to local holds. For example #2.
Entry # 5 is an on order record. No system or local items.
High Demand Holds

- The girl on the train has over 100 holds. Why doesn’t it show up in this report?
- Reporting threshold for the System Report is set to 20 which produced 43 titles.
  - There are 108 holds and 128 copies on TGOTT so less than a 20 ratio – more like 1 to 1
  - Setting reporting threshold to 1.
    - The girl on the train shows up along with 6,300 additional titles.
Purchase Alerts

- Original method of alerting you to titles with a ratio of holds to items
  - Did not factor in on order bibs with no items
- Effectively disabled at Marmot
  - 042 > Holds: Number of holds before purchase alert.........................255
- Create Lists — Copy Purchase Alerts system file into a empty review file.
  - Does not update as conditions change
Fines Paid

- Is complied in real time
- Reconcile cash drawer to Sierra activity
- On screen report can not be customized
- Export to Excel (example to come)
- Do Not Clear the data
Fines Paid Example

Who owns the material - owning location - reconcile material charges taken at other library

Where charges were resolved – login or statistical group to balance cash drawer or see who is waiving charges (could also query circ overrides in Sierra Admin)

Export to Excel for additional data fields
Export to Excel

<table>
<thead>
<tr>
<th>Date Assessed</th>
<th>Patron Na</th>
<th>Patron Re</th>
<th>Patron Un</th>
<th>Invoice</th>
<th>Charge Amt.</th>
<th>Processing</th>
<th>Billing Fee</th>
<th>Charge Type</th>
<th>Owning Locatio</th>
<th>Date Paid</th>
<th>Statistics Grou</th>
<th>Last Paym</th>
<th>Login</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/19/2009</td>
<td>Spinelli, D</td>
<td>1639885</td>
<td>CO DL#941</td>
<td>488544</td>
<td>$4.50</td>
<td>$0.00</td>
<td>$0.00</td>
<td>Overdue</td>
<td>vlnf</td>
<td>9/3/2015</td>
<td>911</td>
<td>$0.00</td>
<td>vlcirc</td>
</tr>
<tr>
<td>5/19/2009</td>
<td>Spinelli, D</td>
<td>1639885</td>
<td>CO DL#941</td>
<td>488545</td>
<td>$4.50</td>
<td>$0.00</td>
<td>$0.00</td>
<td>Overdue</td>
<td>vlnf</td>
<td>9/3/2015</td>
<td>911</td>
<td>$0.00</td>
<td>vlcirc</td>
</tr>
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<td>5/19/2009</td>
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<td>1639885</td>
<td>CO DL#941</td>
<td>488545</td>
<td>$4.50</td>
<td>$0.00</td>
<td>$0.00</td>
<td>Overdue</td>
<td>vlnf</td>
<td>9/3/2015</td>
<td>911</td>
<td>$0.00</td>
<td>vlcirc</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Creation Mo Description</th>
<th>Amount P</th>
<th>Payment Status</th>
<th>Payment Type</th>
<th>Payment Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic</td>
<td>The rise of the cre</td>
<td>$4.50</td>
<td>Full Payment</td>
<td>null</td>
</tr>
<tr>
<td>Automatic</td>
<td>Who's your city?</td>
<td>$4.50</td>
<td>Full Payment</td>
<td>null</td>
</tr>
<tr>
<td>Automatic</td>
<td>The flight of the c</td>
<td>$4.50</td>
<td>Full Payment</td>
<td>null</td>
</tr>
</tbody>
</table>

Notice the “null” under Payment Type and empty Payment Note Cells
Payment Type feature has not been enabled.

- Records consortia assigned codes detailing method of payment
  - Cash | Credit | Check | Work Release | Barter
- Recommend creating consortia codes for types of Waive transactions
  - Waive (good will) | Waived (system or staff error) | Waive (food for fines)
- 14 total codes
- Optional free text staff note
- Adds an additional step to clearing charges
Payment Type

Tip: make the first code be the most commonly used type of payment
Payment Note is optional
<table>
<thead>
<tr>
<th>Creation Mode</th>
<th>Description</th>
<th>Amount Paid</th>
<th>Payment Status</th>
<th>Payment Type</th>
<th>Payment Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic</td>
<td>If I stay / Metro-Goldwyn-Mayer Pictures and New Line Cinema present a Di Novi Pic</td>
<td>$1.00</td>
<td>Full Payment</td>
<td>C</td>
<td></td>
</tr>
<tr>
<td>Manual</td>
<td>OVERDUE 30611000749745 The nurse's secret suitor / Cheryl Wyatt.</td>
<td>$0.00</td>
<td>Waive</td>
<td>W</td>
<td>illness</td>
</tr>
<tr>
<td>Manual</td>
<td>OVERDUE 30611000705689 A place to call home / Kathryn Springer.</td>
<td>$0.00</td>
<td>Waive</td>
<td>W</td>
<td>wrong loan rule</td>
</tr>
<tr>
<td>Manual</td>
<td>OVERDUE 30611000740009 Making his way home / Kathryn Springer.</td>
<td>$0.00</td>
<td>Waive</td>
<td>W</td>
<td>knows director</td>
</tr>
<tr>
<td>Manual</td>
<td>OVERDUE 30611000705721 A family for Faith / Missy Tippens.</td>
<td>$0.00</td>
<td>Waive</td>
<td>W</td>
<td></td>
</tr>
<tr>
<td>Manual</td>
<td>OVERDUE 2013-07-11 30618001271835 Taking Chance [videorecording] / HBO Films presents a Civil Dawn P</td>
<td>$0.00</td>
<td>Waive</td>
<td>W</td>
<td></td>
</tr>
</tbody>
</table>
Add Contact Info to Screen

- Current Marmot setting is print contact info on hold slip.
- Could be added to screen display
- For libraries that call patrons
- See email? Hold Notice
- Don’t see email then call
- No email. No phone?
  - Carrier Pigeon?
Circulation Features

- Check in (no patron) do not fulfill hold
- Count Use
- Floating
- Rapid Update Due Date
- Globally Purging Fines
Checking in without trapping hold

- Item is damaged and you do not want to trap a hold and you are clearing it from patron’s card

Check-In (No Patron) and check mark the Do Not Fulfill Holds found under Tools
Check-In (Do Not Fulfill Holds)

Remember to reset after you have finished with your item or items
Count Use

- Traditionally used by libraries who track items used within the library but not checked out – Internal Use
  - Usage stat in Decision Center | Circ Activity - In House in Web Management Reports
- Can be used for special projects since you can’t scan barcodes directly into a Create List Review File
- Can be used with SQL reports to import a file of item barcodes from a SQL reporter
Count Use
Count Use

- Requires some coordination within the consortia and within the library
- Identify one of the three fields that is not being used at this moment
  - Iuse 3
  - Internal Use
  - Copy Use
- Use Create Lists and Rapid Update as needed ahead and after the project to reset your library’s items to 0 for your item field
Count Use

- Gather up materials
  - Subjective Weeding
  - End of the day
  - New to old/circ to stacks
- Scan each barcode at least once.
- Use create lists to find the items
  - Line 1 (agency or location code to limit to your material)
  - Line 2 (item field you selected is not equal to 0)
Count Use and SQL

- SQL reports can’t be imported directly into Sierra (enhancement)
- With basic manipulation in notepad can take a file of barcodes and add a special prefix in front of the barcode a:35239000000060
- Count Use (portable reader) mode to load this file
- Updates the counter in the items and Create Lists is used to find them using same strategy
- [http://csdirect.iii.com/documentation/rdiformats.shtml](http://csdirect.iii.com/documentation/rdiformats.shtml)
Floating Collections

- Reduce amount of material in transit
- Item is checked in at a new location
- Sierra consults float determiner table
- If floats, changes the location code to new location
  - Requires matching codes at each location
  - Example: evebd and evabbd otherwise new code would be eve or eva (minus the shelf designation)
- If doesn’t float, put in transit
- Decision Center reports on drought and pooling
Rapid Update Due Date

- Bookmobile misses a stop and won’t return for a month
- Create list of items (must be items)
  - Due date
  - Checkout location
- Rapid update | Tools | Update Due Date
Rapid Update Due Dates

Tools – Rapid Update Options – Update Due Date
Only works on review file of item records and can only change Due Date

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>85 DUE DATE</td>
<td>.20</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>#</th>
<th>Record No.</th>
<th>Details</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Rapid Update Due Dates

- The following considerations apply when updating due dates using Rapid Up:
  - Loan rule logic is not applied to these transactions.
  - Due date extensions are not affected by patron blocks or expired patrons.
  - Circulation statistics do not reflect these transactions.
  - Notices already queued for printing before the up are still printed. No pre-existing information in any of the notices files is revised.
  - Overnight system jobs that create notices recognize and honor the new due dates.
  - Holds and recalls are not affected by the updated due date.
  - Any bookings associated with the items are overlooked. Priority is given to the patron with the item.
  - The DUE DATE value can be set to the present day or forward. No backdating is allowed.
  - Due Dates can be set only by exact date. Hourly values can not be set.
  - INN-Reach items are not eligible for updating.
Globally Purging Fines

- Does what it says it does
  - Charges are removed
  - Can not be undone (cheaply)

- Typical use case, library routinely purges inactive patrons. Some of these can not be deleted due to unpaid charges

- Use Create Lists to find inactive patrons with money owed equal to or less than desired amount. Remember how you named or numbered this file.
Globally Purged Charges

Note could be done across the data base by mistake
Make sure you select Review.
Select the right file. “Mike Use This One !!!!!!!!”
Write to fines paid. Do you want deniability? We keep no records of what we have purged in uncollected debt?
Holds – System Settings

- 048 > Holds: Give precedence to local holds..............................YES
  - Local is determined by “pickup location”

- 049 > Holds: Allow multiple title-level holds for one patron............YES
  - Book club holds – staff only through Sierra
  - Sends all holds as a group. Does not distribute based on number of copies at a location
  - Best to checkout any copies in hand before placing hold otherwise system starts at your library
Paging

- Copies on the shelf that could fill the hold based on loan rule and request rules
- When hold is placed, Sierra builds a list of which items can fill that hold at that moment
  - List does not update as new copies are added
  - Assumes Cataloging checks those in
- Always looks at the pickup location first to see if there is a copy that could fill the hold
- Then follows priority order to next copy at a different location until hold gets filled
Hold Priority Table

Priority can be a number from 0 to 99, with 99 being the highest priority. A value of 0 blocks requests and holds on available items at a particular branch. Not sure how three digit numbers are being read.
Paging — when does it move?

- Hold placed at 3pm on Monday goes to Carbondale.
- Eligible to move at 3pm on Tuesday
  - 086 > Pageslips: Number of hours before page can be transferred..............24
- Moves when chron job is set to move.
  - 6am (typical – III Help Desk could confirm)
  - So page actually moves on Wednesday at 6am
Paging – what happens if never filled?

- Can be canceled automatically
  - Hold cancel notice if generated
  - 081 > Hold Cancel Notice: Not wanted after date past: Text #.................8

- Can remain as an outstanding Bib Level hold (appears not to be set currently)

- Can cycle through a new paging list (optional and not currently set at Marmot.)
Agency Holds

- Multi branch library systems within Marmot are assigned an agency code in the item and patron records.
  - Groups branches into an agency so Sierra can sometimes consider them as one unit instead of individual branches.
  - Key is the agency code assigned to the item record. For example, 155 Garfield.
Agency Holds

- An item is checked in with an AGENCY fixed-length field value of "155 Garfield" and the Hold Pickup Locations table contains five entries assigned the “155 Garfield" agency…
- The system first checks for any local holds – the item matches a hold at that location…
- Next the system checks for holds at each location associated with the five Hold Pickup Location entries assigned the “155 Garfield" agency. The “Garfield” system.
Agency Holds

- If the item has multiple holds at one or more of the pickup locations assigned the "155 Garfield" agency, the system fills the hold associated with the "155 Garfield" agency that is earliest in the hold queue.

- If the item does not have a hold at any of the pickup locations assigned the "155 Garfield" agency, the system fills the first fillable hold in the hold queue.
Questions?

Pebbles and Pompeii say thank you for your attention and carry on!