

# Managing Holds in NExpress

**Holds Queue:** A dynamic list of items for which patrons have placed holds

## Circulation Reports

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## Facts:

- Generated three times daily at 7 am, 1 pm and 4:30 pm.
- Different items will appear on the list depending on when it is viewed.
- Each library is assigned items to pick based upon the current availability of the item.
- A hold placed by a local patron will be filled first from the local library collection. If it is not available at the local library, then the hold is randomly assigned to another library for picking.
- Pick the list at least once each business day.
- The Holds Queue looks like this:

Holds Queue						
6 items found for OTTAWA						
Title	Collection	Call Number	Barcode	Patron	Send To	Date
<a href="#">Elvis '68 comeback</a> Sony BMG Music Entertainment, , 2006 : 1 videodisc (94 min.) : 4 3/4 in.	DVD	ADULT DVD F ELVIS	33080001035107 <i>or any available</i>	Patron name and number	ATCHISON	07/22/2011
<a href="#">Father knows best.</a> Shout Factory, , 2008 : 4 videodiscs (660 min.)(DVD) : 4 3/4 in. ISBN: 9781603990578   1603990577	DVD	ADULT DVD F FATHER	33080000983174 <i>or any available</i>		LEAVENWRTH	07/22/2011
<a href="#">How the rooster saved the day /</a> <b>Lobel, Arnold.</b> Greenwillow Books, , 1977 : [32] p. : 21 x 26 cm. ISBN: 0688800637   0688840639 (lib.)	EASY	CHILDRENS E LOBEL, ARNOLD	33080000221856 <i>or any available</i>		SILVERLAKE	07/22/2011
<a href="#">The Ezekiel option</a> Rosenberg, Joel C.,						

## Pulling and Printing the Pick List:

- If you want to print out the Holds Queue, open a Browser NOT associated with a receipt printer.
- Log into the Staff Client and verify the “SET” library is your home branch
- Go to the **Circulation** page.
- Go to the **Holds Queue** link.
- Verify **Your library** is the Library selected in the menu and click **Submit**.
- **Sort** the list by Title, Collection, Call Number, etc. using the arrow buttons.
- **Print** the list.
- You can see sub-title and item information by clicking on the **title link**.
- Take the report to the stacks for reference.
- **Pull the items** you can find, indicate missing items on the print out.
- Bring the items and print out back to the desk to **process**.

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## Processing the Holds Pulled:

- Open and Log into the Staff Client in using your Koha Browser.
- Activate the **Check In** tab or go to **Circulation > Check in**.
- **Scan** the first item.
- Read the dialog box to see if the hold is for a local patron or if it needs to be Transferred to another library.
- Select the appropriate a button:  
**Confirm Hold, Confirm Hold and Transfer or Print Slip and Confirm**

Hold Found: [The road to Balinor /](#)  
Hold for:  
Patron Name and Contact Information  
Hold at Atchison Public Library  
 Confirm hold  Print Slip and Confirm  Ignore

Hold Found: [Peril /](#)  
Hold for:  
Patron Name and Contact Information  
Transfer to: Morrill Public Library, Hiawatha  
 Confirm hold and transfer  Print Slip and Confirm  
 Ignore

- Put the transfer slip into the book or use some other method to indicate where the item needs to go.
- Scan the next item and repeat until finished.
- Put the items in the designated areas for:  
Your Patron's Holds or Courier Deliveries

## Notes:

- Checking in the item may not result in a Holds Prompt if another library has already filled the hold request. This may happen when there are more items available for transfer than there are hold requests.
- The phone number and email address are shown and will print on the transfer slip.
- Patrons with a valid email address are sent an **automatic hold notification** message.
- If you cannot locate an item from the pick list in your library, skip it. If another library owns a copy, the hold will move on automatically.
  - If you own the **ONLY** copy of the item and you are sure the item is missing, mark it missing from the Items Tab of the Bib record.

**Statuses**  
Current Location: Eudora Public Library  
Checkout Status: Not Checked out  
Lost Status:    
Damaged Status:

- As a courtesy, your library should contact the home library of the patron requesting the item, so the librarian can try another avenue to fill the request.

# Managing Holds in NExpress

## Managing the Holds Shelf:

**Holds awaiting pickup for your library on: 07/22/2011** [View all branches](#)

19 Hold(s) waiting 7 Hold(s) over

Available since	Title	Patron	Location	Action
07/22/2011	<a href="#">Telling memories among Southern women :</a> (NEW BOOK) Barcode: 0003000026984	Patron name and number	Atchison Public Library 305.43 TUCKER	Cancel hold and return to : Atchison Public Library
07/20/2011	<a href="#">Brazen virtue</a> (BOOK ) Barcode: 0003000012932		Atchison Public Library LP ROBERTS	Cancel hold and return to : Atchison Public Library
07/20/2011	<a href="#">Irish thoroughbred</a> (BOOK ) Barcode: 00105000497153		Atchison Public Library LP ROBERTS	Cancel hold and return to : Atchison Public Library

## Steps:

1. From **Circulation**, Open the “**Holds Awaiting Pickup Report**”. There are two tabs: Hold(s) Waiting and Hold(s) Over.
2. You can re-order either tab by clicking on the **arrow buttons** next to the “**Available Since**” heading.
3. Activate the **Hold(s) Over** tab to manage **Expired** holds that need to be moved on to the next patron or sent home for re-shelving. These are holds that have been on the Holds shelf for at least 7 days.
4. To remove the hold, please do NOT use the button on this report. Instead, click on the **Patron’s name**.
  - o Open the patron’s **Holds tab**.
  - o **Delete the hold** for the item in your hand by setting the Delete? Menu to “Yes” and update the patron’s holds.
  - o Return to the **Circulation > Check in** screen.
  - o **Scan** the book’s barcode.
  - o *If there is another hold for the item*, the Hold Found dialogue box will appear asking you to confirm and transfer the item.
  - o *If there are no other holds for the item*, go to the **Circulation > Transfers** page.
    1. Select the **Destination Library** (the home library where the item needs to be sent for re-shelving).
    2. **Scan the barcode**.
    3. This will initiate a transfer in the system.
5. The Holds Awaiting Pickup Report is in need of a few bug fixes. Please do not use the “Cancel Hold” or “Cancel Hold and return to:” buttons until further notice.