



Holds Management in Transition

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Topics

- holds
- Background
- Challenges
- Hold set-up (Sierra)
- Workflows and Holdshelf management





Holds Over the Years...

- Own hold queue in each branch/location, title-level holds, "paging" by phone
- 2003 2013: Hold queue in system level, title-level holds, item-level paging
- 2013 : Hold queue in system level, title-level holds, title-level paging & item-level paging (magazines)





... And Recent Years

- Hold set-up changes
- Hold fees
 - Hold fee (not anymore)
 - Unclaimed hold fee (not yet?)
- Pickup period
 - 10 days à 7 days à 5 days
- Hold pick-up notices
 - Still mail, email, local text msg service
 - Extended chedule Mon Fri + Sat
- Resource sharing: holds & floating
- Re-organizing holdshelves





Background: Helmet Libraries

HELMET

- Helmet means Pearls (<u>www.helmet.fi</u>)
- 4 public libraries in Helsinki Metropolitan Area
 - Helsinki, Espoo, Kauniainen and Vantaa, population 1,1 million
- 65 branch libraries, 6 book mobiles, hospital libraries, homebound services and special collections
- 40 years of co-operation
- Millennium 2003 2013
 - Encore 2010 -
- Sierra November 2013
 - Sierra API 2014 -
 - Decision Center 2014 –





Background: Helmet Policy

HELMET

- Joint database and shared collection
- Joint patron register, library card and user regulations
- Joint circulation parameters and loan rules
- Chronological hold queue
- One title level hold per patron
 - Staff can place several title holds in Sierra (e.g. for schools, book clubs)
- "Finders keepers"





Current Challenges

- Online shopping, online booking ... and online requesting
 - Helmet Web Store à sorting & transportation takes (too much) resources
- New legislation, new duties, new services
 - makerspaces, language cafes, programs and events, R.E.A.D dogs etc.
- Request for enhanced opening hours
- Construction of the new Helsinki Central Library has started
 - http://keskustakirjasto.fi/en/
- Additional staff will not be granted



Statistics

- Visits on the catalog 2016: 6.3 million
 - 2016: + 7.5 %
 - **2015: + 9.4 %**

- Holds placed 2016: 2.6 million (print & media)
 - 2.1 million placed by patrons, 0.5 placed by staff (in the library)
 - **2016: + 9.8 %**
 - 2015: **+** 15.2 %
- Checkouts & renewals: ca. 16 million per year



Solutions

- Self-service libraries
 - Enhanced opening hours
- Self-service since 1990's
 - 250+ SIP2 check-out/check-in devices
- Collection management
 - Workflows, floating, life cycle management
- Holds management
 - Paging (title-level)
 - Holdshelves (self-service)
- Cash management
 - Online payments since 2014
 - Card payments only or Cash payments too
- Work in progress!





Starting Floating Collections

- Vantaa
 - Floating Collection 2015 –
- Espoo
 - Floating Collection 2016 –
- Espoo and Vantaa
 - Floating together 2017 –
 - Most material types and locations float
- Kauniainen
 - One library only
- Helsinki
 - Mobile Collections 2004 –
 - Logistics & Floating project





Moving on to Title Priority Paging

- Switch-over before Sierra migration 2013
- Default hold set-up
- One hold queue for patrons
- Easier holds management for staff
- No need to transfer holds manually
- Hold Pickup Locations table is more complicated
- Staff workflow changed
- Patron experience didn't really change







Hold Set-up: Title Priority Paging

- Holds placed on title-level
- Paging on title-level
- Except magazines and special situations on item-level
- Hold Pickup Locations table used for balancing
- Item not found à hold remains on title-level
- Staff placed holds
- Patron placed holds





Multiple Channels – Same Outcome

Sierra



- Encore & Encore Mobile (Helmet Search)
- WebPAC & AirPAC (Helmet Catalog)
- Pocket Library (Local Mobile App)
- Finna (National Catalog, VuFind)
- Maybe Linked Data too?







Documentation

- Start Using Title Priority Paging & Set Up Holds
- Sierra/Millennium Title Priority Paging Feature:
 - Enabled by Help Desk
 - Send title-level pages
 - Designate locations that should not be paged
 - Indicate the order in which locations should be paged
 - Group locations at the same paging level (random paging within the group)
- Built-in features:
 - Priorities, Transfer of pages and Page pickup location first
- Features not compatible (not needed any more):
 - Library Priority Table, Page Pickup Location First, Regional Holds product





Request Set-up (WebPAC/Encore)

- Web Options & Request Rules
- REQUEST = Request this item|bib|ask|Y
 - Bib = Bibliographic-level holds. If there is a VOLUME field in any of the attached item records, the patron will be prompted to select a volume.
 - Ask = Select the pickup location from a drop-down list. If the patron is logged in to My Account the drop-down list defaults to the patron's home library.
 - Y = Not Needed After (NNA) drop-down menu on request form
- Requesting is allowed if order record or item record is attached to the bibliographic record.



Request Configuration REST API 3.2

- Both bib and item holds via the REST API
- Requires additional configuration (Help Desk)
- Configure XCirc to accept both bib and item holds
- Documentation: http://developer.iii.com
 - Use the PatronHoldPost object to place a new hold request







Requesting in Encore/WebPAC

- Requesting in Library Catalog
 - Integrated Login Page (CAS)
 - Library card number (barcode) and PIN for authentication
 - Select pickup location
- Manage holds on My Account
 - Change pickup location, freeze hold or cancel hold
 - Change home library (default pickup location)
- Pickup your book
 - Hold pickup notice (in Fin/Swe/Eng, by mail/email/sms)
 - My Record RSS feed





Holdable Items Not Available (Finlandia Prize Winner 2016) à Title-level Hold Queue

< Back to results



Akvarelleja Engelin kaupungista / Jukka Viikilä. / Jukka Viikilä Viikilä, Jukka, kirjoittaja.

Book | Gummerus | 2016 | 5. p. 2016

Available at Iso Omena adu (1.4 BESTSELLER) plus 2 more 1395 holds on first copy returned of 441 copies

♦ ♦ ♦ ♦ ♦ 2 reviews



Additional actions:





Items	only show availah
Items	only show availab

ional info
YS NO HOLDS



Holdable Items Available (Finlandia Prize Winner 2008) à Title-level Page

< Back to results



Puhdistus: romaani / Sofi Oksanen / Sofi Oksanen

Oksanen, Sofi, kirjoittaja

Nook | WSOY | 2008 | 1.-12. p. 2008. - 13.-16.

p. 2009. - 14.-19. p. 2009. - 23. p. 2010. - 25. p. 2010 - 28. p. 2010. - 29. p. 2011. - 32. p. 2012. - 38. p. 2013

Available at Entresse adu (1.4) plus 5+ more





Additional actions:





Location	Call No.	Status	Additional info
Arabianranta adu	1.4	DUE 15-03-17	_
Arabianranta adu	1.4	DUE 16-03-17	<u></u>
Arabianranta adu	1.4	DUE 13-03-17	375
Auroran sairaala adu	1.4	LIB USE ONLY	-
Entresse adu	1.4	ON SHELF	10.22
Entresse adu	1.4	ON SHELF	

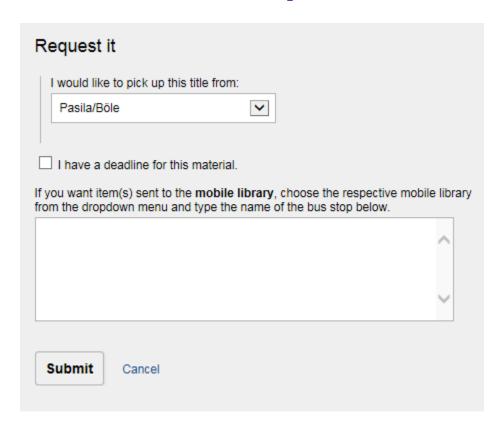


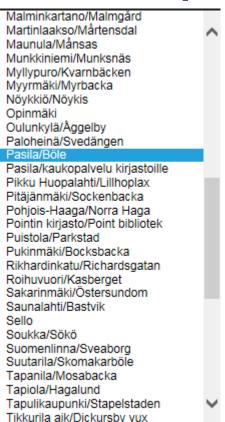
Magazines (Aku Ankka no. 2 2017) à Item-level Page

Request it			
Select			
O Arabianranta juv	no.1 2017	ON SHELF	^
Arabianranta juv	no.2 2017	ON SHELF	
O Arabianranta juv	no.3 2017	ON SHELF	
O Arabianranta juv	no.4 2017	ON SHELF	~
I would like to pi	ck up this title from	m:	
Pasila/Böle		<u>~</u>	
☐ I have a deadli	ne for this materia	ıl.	
		e library, choose the respective nu and type the name of the b	
		,	



Select Pickup Location and Other Options







Encore My Account

Aakko, Test Record				Home Library:	E	mail:	
HelMet93274 What is this?				Pasila adu	St	isanna.aakko@hel.fi	
Edit account Edit pin	Edit reviewer	name					
Checkouts (0)		CASANA A					Pri
Holds (3)	Sort by Hol	d Requested Date UPDAT	ELIST				
My eBooks (0)				3 holds			
Fines/Fees (EUR8,40) Messages	CANCEL	TITLE	STATUS	PICKUP LOCATION		CANCEL IF NOT FILLED BY	FREEZE
Reading History		Akvarelleja Engelin	1396 of	Pickup Location		19-02-19	Freeze
My Lists		kaupungista / Jukka Viikilä.	1396 holds	Pasila/Böle	~		
My Reviews (0)		Puhdistus : romaani / Sofi	1 of 1 holds	Pickup Location		19-02-19	Freeze
Preferred Searches		Oksanen		Pasila/Böle	~		
RSS Feed							
		Aku Ankka : Helsinkino.2 2017	ON SHELF	Pickup Location		19-02-19	Freeze
		no.2 2017		Pasila/Böle			



Encore Personalized Browse





Kuullut kaupungit : kaksi kuunnelmaa / Jukka Viikilä / Jukka Viikilä

Viikilä, Jukka, kirjoittaja

Book | ntamo | 2013

3 holds on first copy returned of 8 copies

☆ ☆ ☆ ☆ Be the first to review

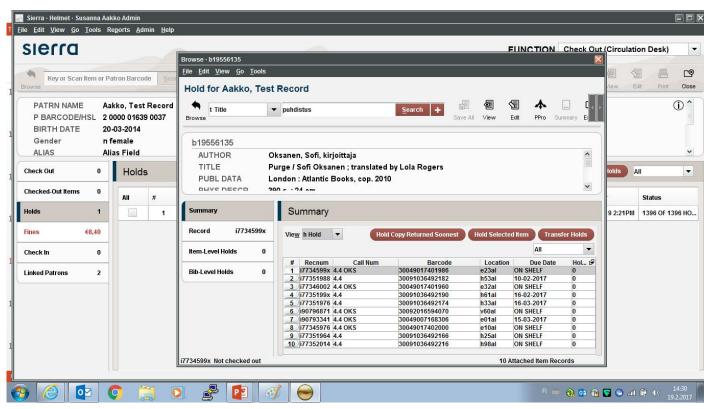


Additional actions:



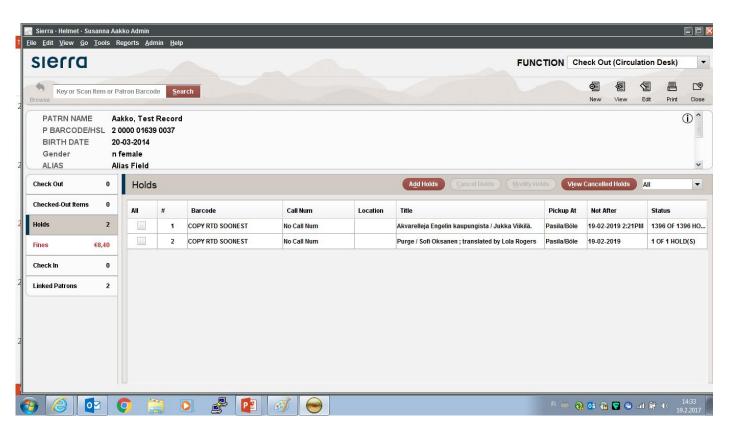


Hold Copy Returned Soonest à Title-level Page Hold Selected Item (Magazines) à Item-level Page





Sierra Patron Record Holds Tab





Enbale Title Priority Paging (Help Desk)

- Millennium/Sierra: Enable Title Priority Paging
 - "The Title Priority Paging feature enables Sierra/Millennium libraries to send title-level pages. Staff may designate locations that should not be paged and indicate the order in which locations should be paged. Staff may also group locations so that, within that group, locations are paged in random order."
- Helmet set-up:
 - Pages that have finished the paging cycle should remain as title-level holds
 - Page open locations before closed locations
- Sierra: Configure the ability to cycle through a paging cycle multiple times
 - "Innovative can configure Title Priority Paging so that unfilled pages repeat the title paging process a library-specified number of times."
- Helmet set-up:
 - Enabled: 5 times through



Title Paging in Helmet Libraries

- Library locations are paged one by one
- When items are available on shelf
 - Page pick-up location first
 - Page other "standard" libraries in the same area randomly
 - Page "standard" libraries in other areas randomly
 - Page book mobiles, closed stacks and other "non-standard" locations
 - Any holdable item on shelf fulfills the hold
 - Any holdable item checked in at any location fulfills the hold
- When items are not available on shelf
 - Hold is on the title-level hold queue
 - Next holdable item checked-in fulfills the hold





Hold Pickup Locations Table

Must set-up paging priorities for each entry in the table

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	•	盈	m		=	圕	圍	+		œ	C	
	Append	Save	Delete	Сору	Insert	t Edit	View	Move	Print	Close	Refres	h
		isplay N	ame		- 1		L	ist of Loc	ations			I
34	Martinlaakso/Mårtens	sdal			- 1	v62al, v62ll, v62ml, v62nl						1
35	Maunula/Mansas					h63al, h63ll						
36	Munkkiniemi/Munksnäs					h33al, h33ll						
37	Myllypuro/Kvarnbäcken					h92al, h92ll						
38	Myyrmäki/Myrbacka					v60al, v60a	av, v60II, v	60ml, v6	0nl			
39	Nöykkiö/Nöykis					e30al, e30ll, e30ml, e30nl						
40	Opinmäki					e25al, e25ll, e25ml, e25nl						
41	Oulunkylä/Aggelby					h64al, h64ll, h64ml						
42	Paloheinä/Svedängen					h67al, h67ll						
43	Pasila/Böle					h01al, h01ll						
44	Pasila/kaukopalvelu k	cirjastoil	le			hxxal						
45	Pikku Huopalahti/Lillh	oplax				h30ll, h30a	al					



Paging Priorities

- Priority 0: system does not page the location
- Priorities 1 999: paging order (1 is the highest priority)
- Helmet set-up:
 - 84 hold pickup locations (libraries, book mobiles, hospitals, internal locations e.g. central stacks)
 - Random paging within groups 1, 100, 995, 999
 - Hospital libraries not paged 0
- Library: Kallio/Berghäll
 - Portion of the table à à à

Display Name	Paging Priority
Maunula/Månsas	1
Munkkiniemi/Munksnäs	1
Myllypuro/Kvarnbäcken	1
Myyrmäki/Myrbacka	100
Nöykkiö/Nöykis	100
Opinmäki	100
Oulunkylä/Aggelby	1
Paloheinä/Svedängen	1
Pasila/Böle	1



Circulation Option: # of hours

- Circ Option: Number of hours before page can be transferred
- Must set up!
- Applies to Title Level Paging
- Applies to Automatic Transfer of Page Items

- Helmet set-up now: 48 hours
 - 48 (item paging)
 - 24 (title paging) à 168 (title paging max)
 - 48 hours again (title paging)





Circulation Option: refuse holds

- Circ Option: Priority Paging Refuse Item Holds: Yes
- Option to refuse to fill an item-level or title-level hold with the item you are checking in
- Check-in Prompt:
 - Fulfill hold
 - Check in; do not fulfill hold
 - Cancel hold
- Title pages go forward automatically





Block Duplicate Holds (Help Desk)

- Block Duplicate Holds feature: False
- Patrons can request multiple volumes in WebPAC/Encore
 - Multiple items with volume field attached to the same title
 - Item-level hold placed

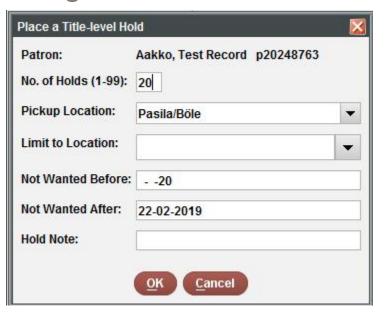






Circulation Option: multiple holds

- Circ Option: Allow multiple title-level holds for one patron: Yes
- Not compatible/may conflict with following features:
 - Library Priority Table, Regional Holds
 - Block Duplicate Holds, Max Holds on Title
- Staff can place multiple title holds
 - For schools, book clubs etc.





Renewals, Title Holds and Available Items

- Renew Items with Title or Volume Holds feature
- Millennium/Sierra staff function
- Set-up by Help Desk



- Renew items with title-level holds if there are enough holdable items available on shelf to fulfil the holds
- WebPAC/Encore patron function (Sierra 2.1)
- Set-up by Help Desk



Holds Management Workflow

- Hold Pickup notices sent as Autonotices (starting 4 am)
- Title and Item Paging lists printed by circulation staff
- Clear expired holds and holdshelf (daily)
 - Clearing holds limited to the user's branch (Innovative set up)
- Clear holdshelf manually (once a month recommended)
 - Find misplaced items, cancel the hold and check in the item
- View outstanding holds
- Purchase alerts
 - Report created once a month for acquisitions departements
- High-demand holds report
 - Libraries may use, not required





Best Practices

- Place holds on title-level
- Place holds on item-level: magazines and special situations only
- Do not place or transfer item-level holds to non-holdable items or unavailable items
- Print title-paging list daily, several times
 - Item attached to the requested title not found à (mark item lost) à next library will be paged
- Print item-paging list daily, at least once
 - Item not found à transfer hold to the next available item (on shelf) and mark item lost OR transfer hold to the bib-level (Sierra 2.3)



Paging Lists

- Permission: 394 Title Paging Lists
- Permission: 358 Item Page Lists

- Title Paging List (Print Templates):
 - Class#, Author, Title, MatType, Location and Barcode
- Item Paging List (Print Templates):
 - Class#, Author, Title, MatType, Location, Barcode and Volume



View Outstanding Holds

- View outstanding holds
 - Bib holds with 1 item attached
 - Stalled item-level holds
- Sierra Browse Query: Saved Searches to find "stuck" holds
- Default Expiration Date
 - Login Option: Default Not wanted after: 730
 - Encore/WebPAC: Innovative set up: 730
- Patrons can manage their own holds!





Holds Management FAQ

- I cancelled a hold accidentally and I don't know patron barcode or name.
 - Use View Holds to find the hold by item barcode or title
 - View Holds report updated overnight so can't find holds placed today and cancelled today
- Clear holdshelf function didn't clear the holdshelf.
 - You probably used View button instead of Clear button

Am I in trouble?

- Hold is not trapped when I check in the book.
 - Hold is frozen (grayed Not needed before date displays in Sierra)
 - Age limit is used (loan rule)



Holdshelf Management

- Holdshelf organized by:
 - Pickup by date and Patron name
 - Patron name
- Self-service holdshelf organized by:
 - Patron alias
 - Pickup by date and Author (or Title)
- Easy for customers? Easy for staff? Easy to clear?

New Holdshelf Structure (Sierra 3.1)



Self-service Holdshelf (Helsinki)

- Holdshelf slips not printed
- Patron name or Alias not used
- Arranged by Pickup by date and Author
- Hold notice or access to Library catalog/My account needed
- In transit (hold) slips not printed
- Holds transported separately





Holdshelf FAQ

Possible reasons for errors

- Items misplaced by staff (or by patrons using selfcheck-in)
- Errors in parameter tables
- Workflows and parameters mismatch



Item On holdshelf too early

- Checked-in using a Login which don't have a Locations Served entry
- Checked-in using a Selfcheck device with incorrect IP in Limit Network Access table
- Checked-in using Offline Circulation and if the Offline file is loaded to Sierra using inappropriate settings



Decision Center: Holdshelf Trends

									EMA	IL / SCHEDUL	E EXPOR
Transaction Location	All Times	Feb 2017	Jan 2017	Dec 2016	Nov 2016	Oct 2016	Sep 2016	Aug 2016	Jul 2016	Jun 2016	May 2016
All Transaction Locations	12%	13%	12%	15%	14%	13%	13%	12%	16%	15%	14%
Sello	13%	15%	13%	16%	15%	15%	15%	12%	18%	15%	18%



Thank you! Kiitos!

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Cover Art in Helmet Catalog: BTJ Finland

Photo Aksu the Dog: Anna

Photo Aksu on the Boat: Vesa

Photo Holdshelf: Susanna

