Title Level Patron Placed Holds: Taking Resource Sharing Via the OPAC a Step Beyond

Patron Placed Holds in the University System of Maryland and Affiliated Institutions' OPAC

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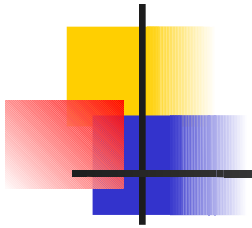


First, a little background information ...

WHAT IS THE USMAI?

- **14 Member Colleges and Universities of the University System of Maryland**
- **2 State of Maryland subsidized institutions**
- **Combined holdings of approximately**:
  - **5,146,294 holding records**
  - **6,939,655 item records**
  - **2,899,261 bib records**

WHAT IS THE USMAI – cont.

- **Members range in size from**:
  - **28,800 FTE at the University of Maryland with 17 sublibraries**
  - **to 196 at the UM Center for Environmental Studies;**
  - **including two law libraries,**
  - **a medical and health services library,**
  - **and a variety of libraries supporting every level of study from undergraduate liberal arts programs to doctoral and post-graduate research**

USMAI MEMBERS

- Univ. of MD

  28,829 FTE
- UM Univ. Col.

  18,863 FTE
- Towson U

  14,134 FTE
- UM at Balt. Cty.

  9,456 FTE
- Salisbury U

  5, 985 FTE
- Morgan St. U

- Bowie St. U 3,841 FTE
- UM Eastern Shore 3,441 FTE
- Coppin St. Col. 3,027 FTE
- Univ. of Balt.. 2,285 FTE
- St. Mary's Col. MD 1,836 FTE
- UM Law 980 FTE
- Univ. Balt. Law 908 FTE
- Ctr for Environ. Std. 196 FTE

APPROX. CURRENT FTE FOR USMAI = 108,184

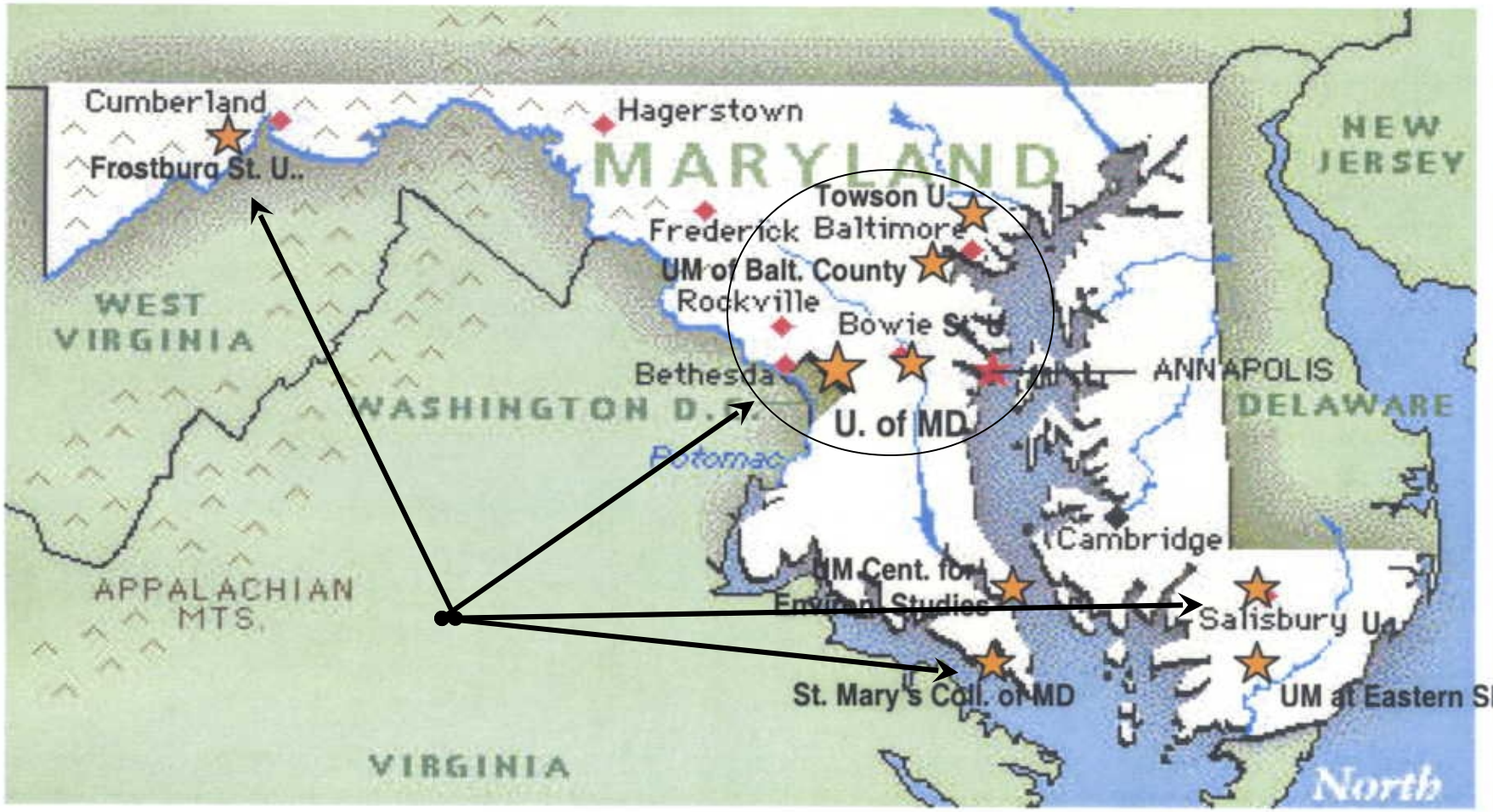
WHERE IS THE USMAI?

11 campuses located in the Baltimore - Washington Area, but:

we extend from the coastlines of the Eastern Shore

to the mountains of Western Maryland

SO, HERE IS THE USMAI



THE USMAI – cont.

- **12 years of a shared Integrated Library System:**
  - **Holdings of 14 institutions migrated to Aleph 500, version 15.2.2 for a STP of January 6, 2003**
  - **Proud to announce the merge of our 15th member, St. Mary's College of Maryland with an STP of May 27, 2003**
  - **Plan to merge our 16th member, the University of Maryland at Baltimore's Health Science and Health Services Library in August 2003.**
  - **URL: http://cat**

  - **New Web PAC:**

RESOURCE SHARING IN THE USMAI

- **11 years actively circulating holdings between campuses via:**
  - **Physical access to all holdings for any eligible USMAI faculty, staff and student**
  - **A sophisticated Patron Placed Holds function in the Web PAC**
  - **A shared patron file of over 600,000 unique patron records**

MORE RESOURCE SHARING IN THE USMAI

- **Each sublibrary has autonomy in most circulation policies**
  - **Diversity in loan and financial policies**
  - **Tab 16 currently contains nearly 1500 lines of code**
  - **251 Borrower Statuses & 80 Borrower Types**

RESOURCE SHARING IN THE USMAI - cont.

- **Eligible users can charge, renew, return any eligible circulating item at any USMAI circulation desk.**
- **The circulation rules for the item-owning institution are always applied.**
- **All patron records and circulation activity (except financial data) can be reviewed at any circulation site.**
- **Patron records can be added or edited at any circulation site.**

SO, WHAT ARE PATRON PLACED HOLDS (OR PPH)?

- **PPH allows users to place their own hold requests in the OPAC:**
  - **PPH is used to place holds on charged items so the user will be notified when the item is returned.**
  - **In some ILS, PPH can also be used to recall an item from another user.**
  - **Often, the hold/recall function stops the item from being renewed by the current user.**
  - **If the library provides ‘paging’, holds can be placed on ‘On Shelf’ items to be retrieved by staff.**

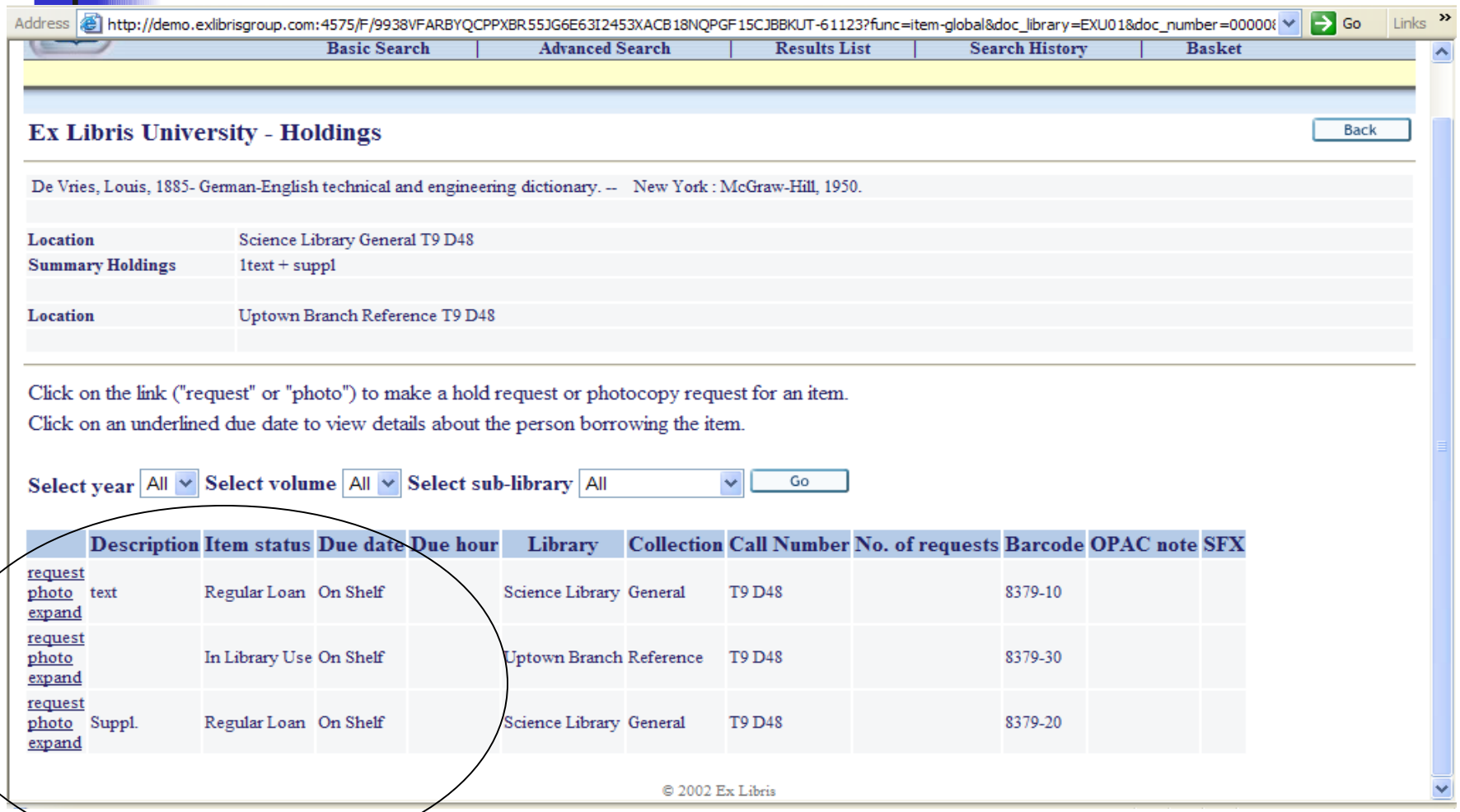
MOST ILS HAVE A FORM OF PPH

- **Will automatically validate the eligibility of the user.**
- **Will determine if the item requested is eligible or can be borrowed by the requester.**
- **Holds are often limited to items within the patron's home sub-library or campus, though some consortiums allow holds between libraries.**
- **If the library or consortium has more than one sub-library, a menu of pick-up sites may be provided where the user has been validated by the ILS as an eligible borrower.**
- **Holds are usually placed on specific items or copies in the catalog (i.e., ITEM LEVEL HOLDS)**

ITEM LEVEL HOLDS & PPH

- The patron places the hold on a specific copy or item from a group of items attached to the same bib record.
- The requester must evaluate the availability of a particular item and select the copy believed to be most eligible (on shelf, circulates, in a preferred location, etc.)
- The user may not be aware that the item is not eligible (restricted loan policies, invalid borrower, etc.)
- Increases the possibility of an unsatisfied hold, the user having to repeat the process to find a

WHAT DOES THE ITEM LEVEL HOLD LOOK LIKE?



Address http://demo.exlibrisgroup.com:4575/F/9938VFARBYQCPPXBR55JG6E63I2453XACB18NQPGF15CJBBKUT-61123?func=item-global&doc_library=EXU01&doc_number=00000 Go Links

Basic Search | Advanced Search | Results List | Search History | Basket

Ex Libris University - Holdings Back

De Vries, Louis, 1885- German-English technical and engineering dictionary. -- New York : McGraw-Hill, 1950.

Location	Science Library General T9 D48
Summary Holdings	1text + suppl
Location	Uptown Branch Reference T9 D48

Click on the link ("request" or "photo") to make a hold request or photocopy request for an item.
Click on an underlined due date to view details about the person borrowing the item.

Select year All **Select volume** All **Select sub-library** All Go

	Description	Item status	Due date	Due hour	Library	Collection	Call Number	No. of requests	Barcode	OPAC note	SFX
request photo expand	text	Regular Loan	On Shelf		Science Library	General	T9 D48		8379-10		
request photo expand		In Library Use	On Shelf		Uptown Branch	Reference	T9 D48		8379-30		
request photo expand	Suppl.	Regular Loan	On Shelf		Science Library	General	T9 D48		8379-20		

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LET'S SEE THAT AGAIN IN A REAL ONLINE CATALOG – UCSB

THE USMAI MODEL: PPH & TITLE LEVEL HOLDS

- **The TITLE LEVEL HOLD concept means the user is requesting a title rather than a specific item.**
- **The requester doesn't need to select an eligible copy from a list of multiple campuses' holdings with varying item statuses or item processing statuses.**
- **The requester is informed immediately if the system can or cannot identify an eligible copy**
- **All decision-making is handled by the Aleph hold request function and BALANCE (an**

WHAT IS BALANCE?

- **A process that runs externally to the Aleph hold function.**
- **Balance evaluates each copy of a title for eligibility the first time it is run after the hold is placed.**
- **Subsequent runs move the request along until the hold is satisfied, or**
  - **it is determined there are no available copies (i.e., 'On Shelf" item is really Missing), and**
  - **if possible, marks the copy on loan the longest for recall**

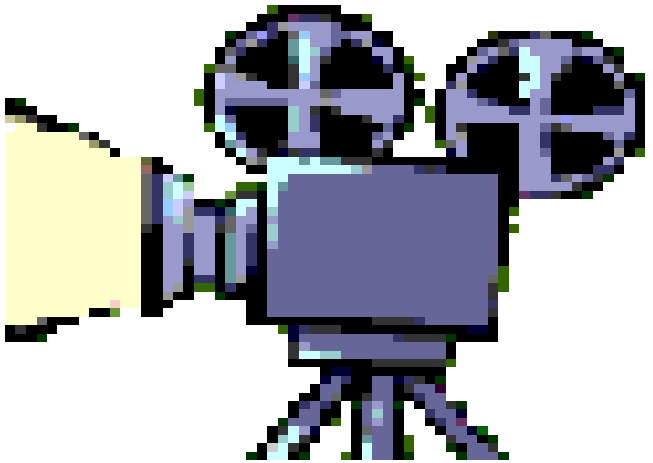
WHAT IS BALANCE? – cont.

- **Items attached to the requested title (bib record) are checked across the USMAI for:**
  - **Item eligibility for loaning (i.e., item status)**
  - **Availability (e.g., charged, billed as Lost, IPS, etc.)**
  - **Chargeability to that patron (e.g., restricted to ‘home’ borrowers only)**
  - **Paging rules**

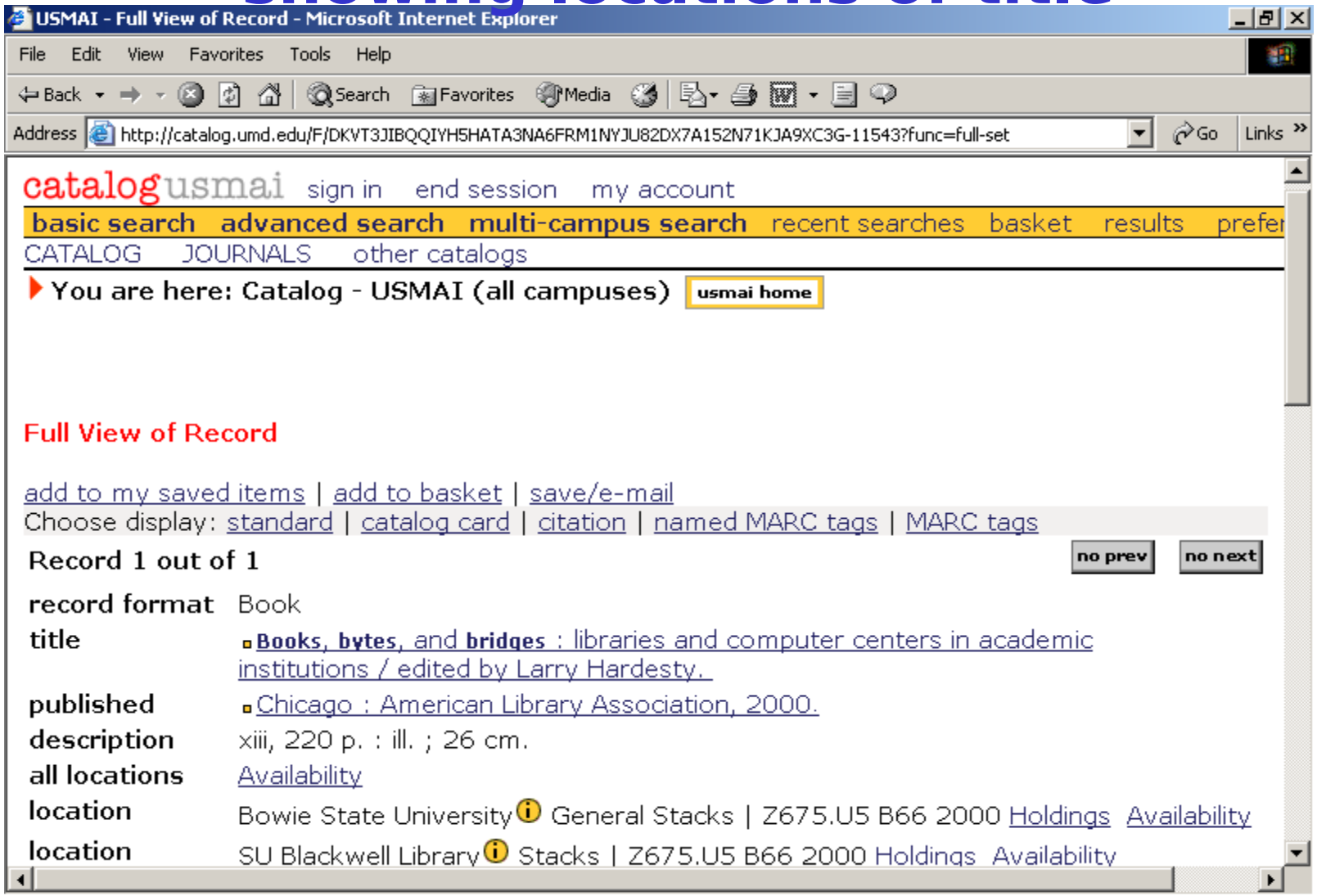
MORE ABOUT BALANCE

- **Eligibility evaluation is based on several Aleph tables – tab_hold_request, tab37**
- **Set Balance to run once a day or many times a day according to the needs of the library or consortium**
- **Makes PPH using Title Level Holds appear seamless to the user, requiring little or no staff intervention**

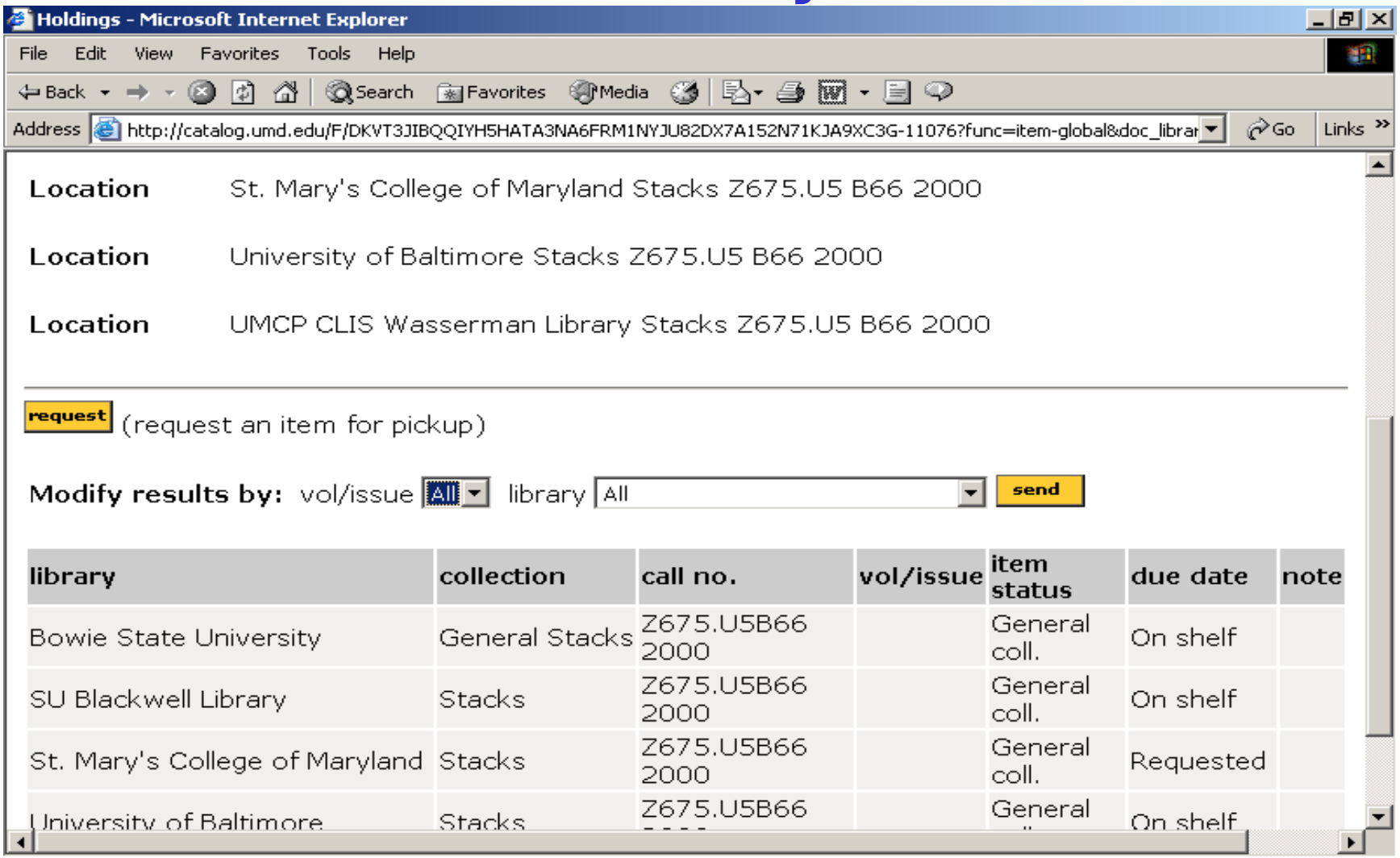
and now, our feature live presentation …



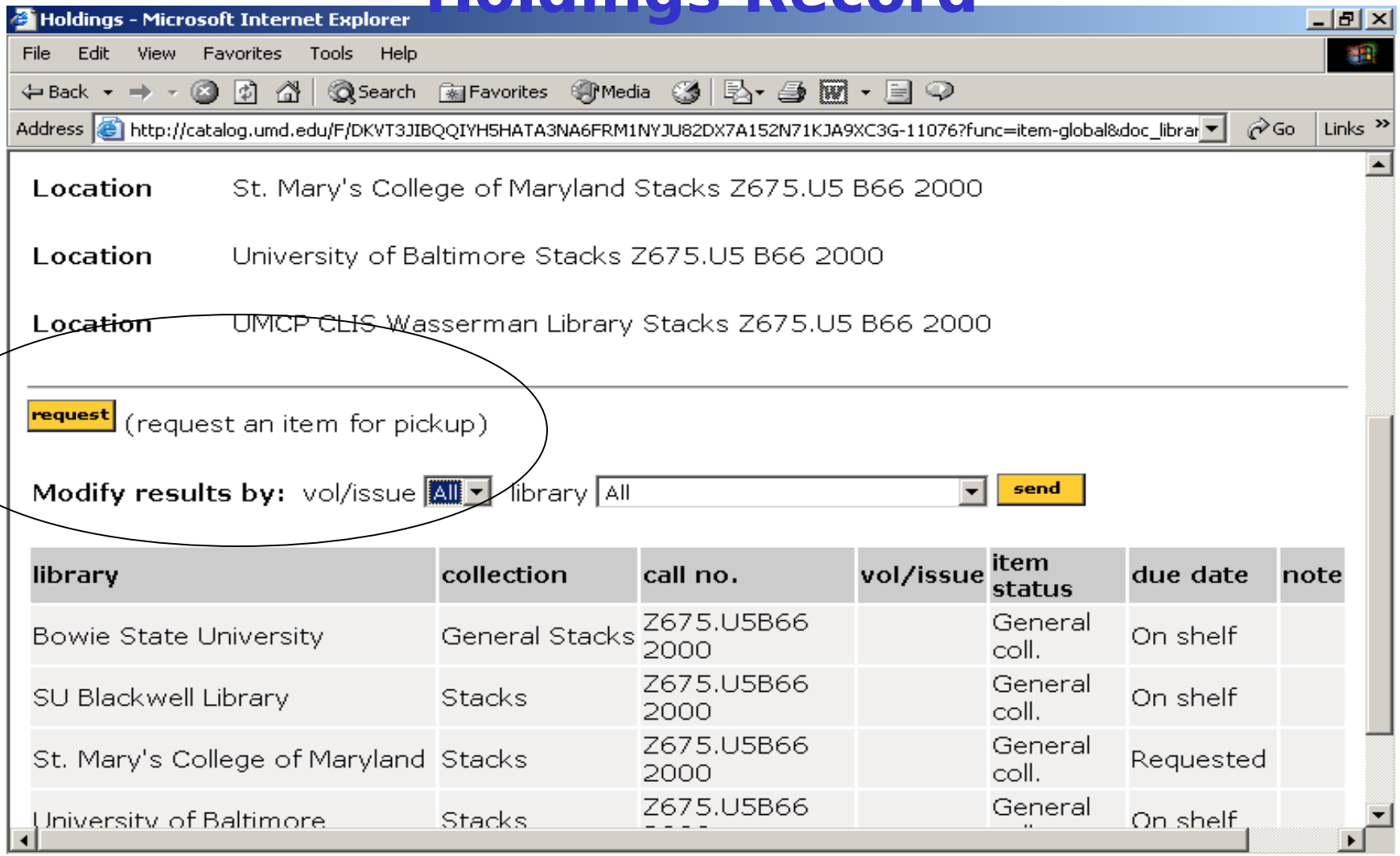
Full bib record from catalogusmai showing locations of title



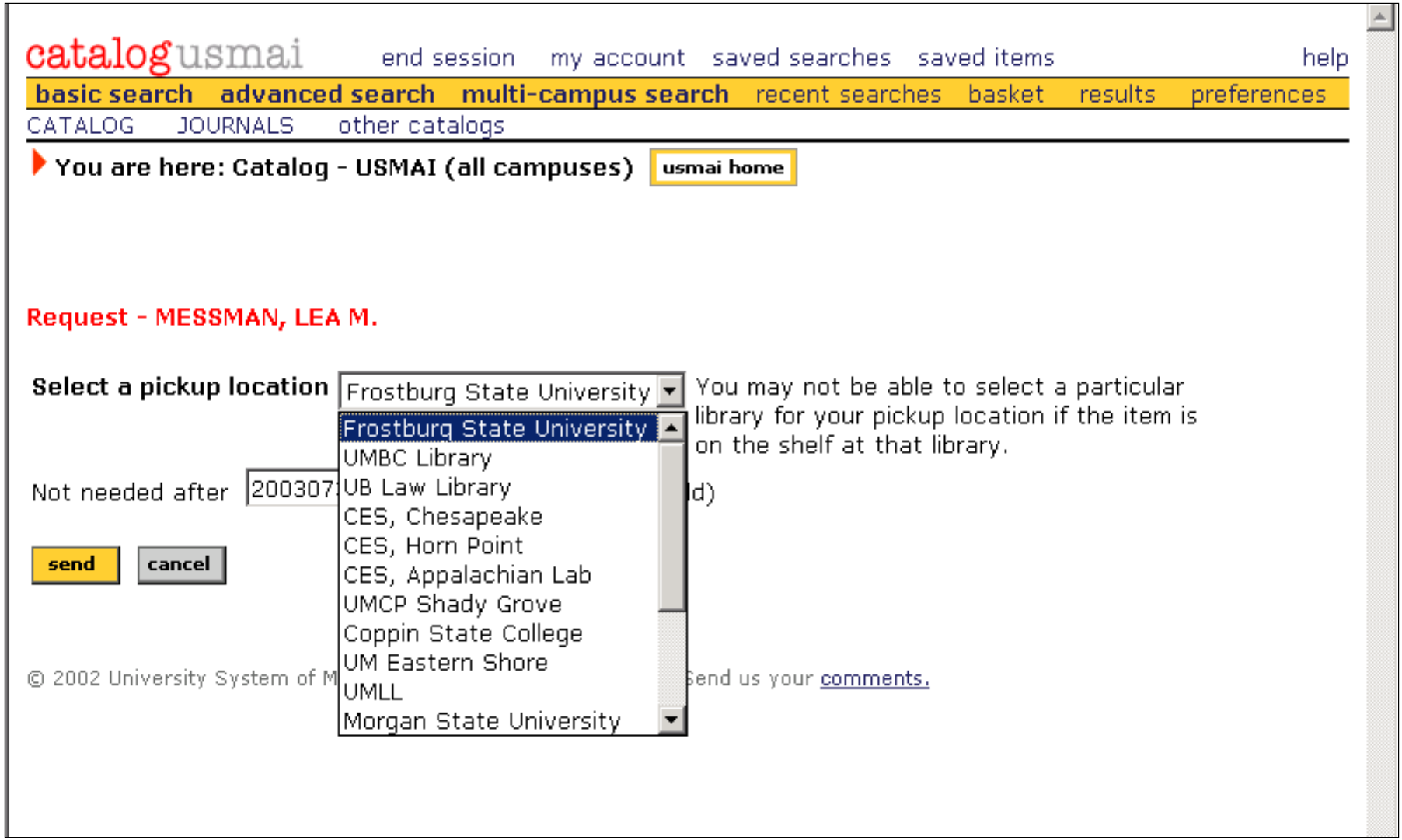
Holdings Record displays Locations and Availability of items



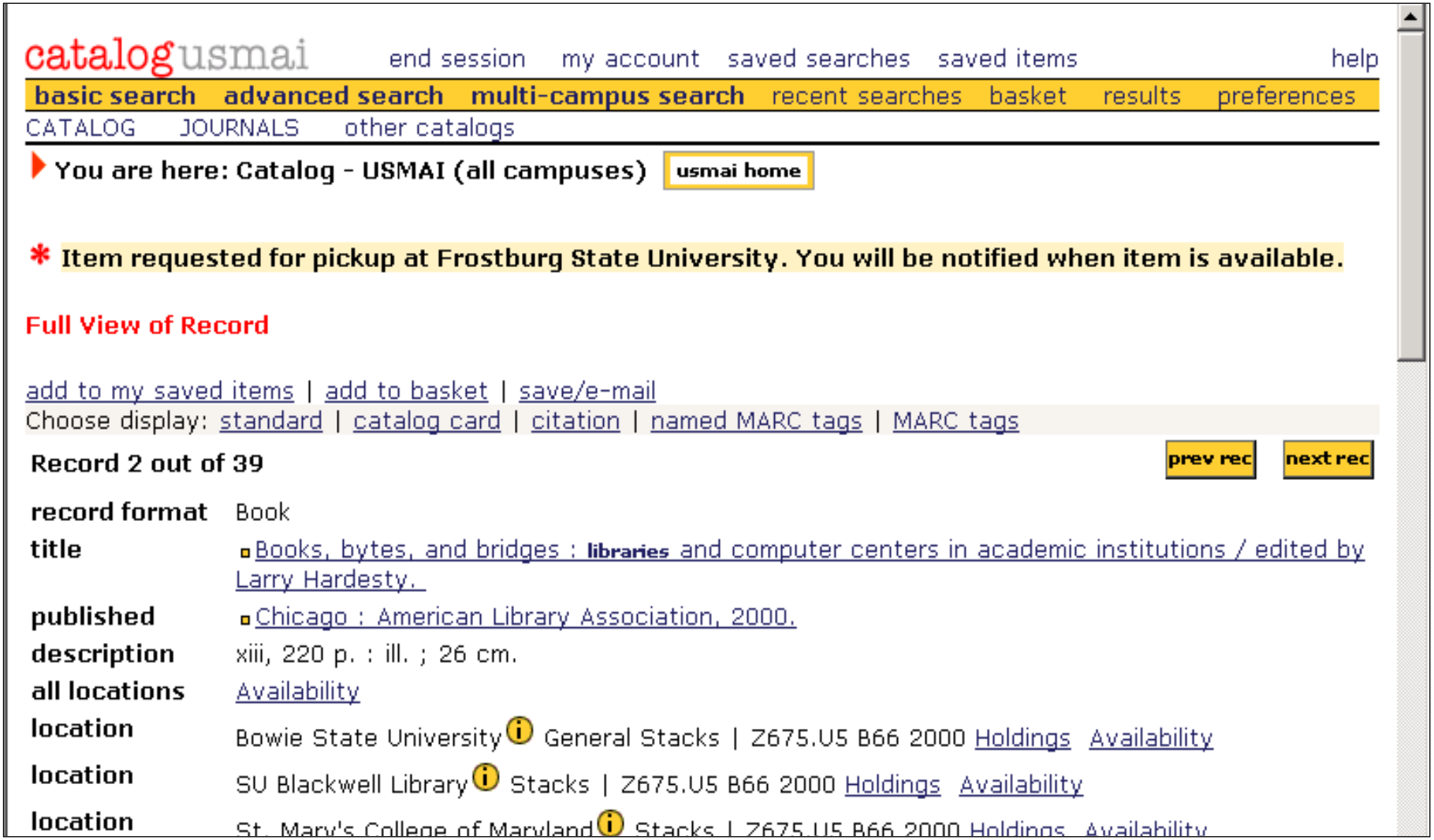
The Request Button for placing a Title Level Patron Placed Hold is located on the Holdings Record



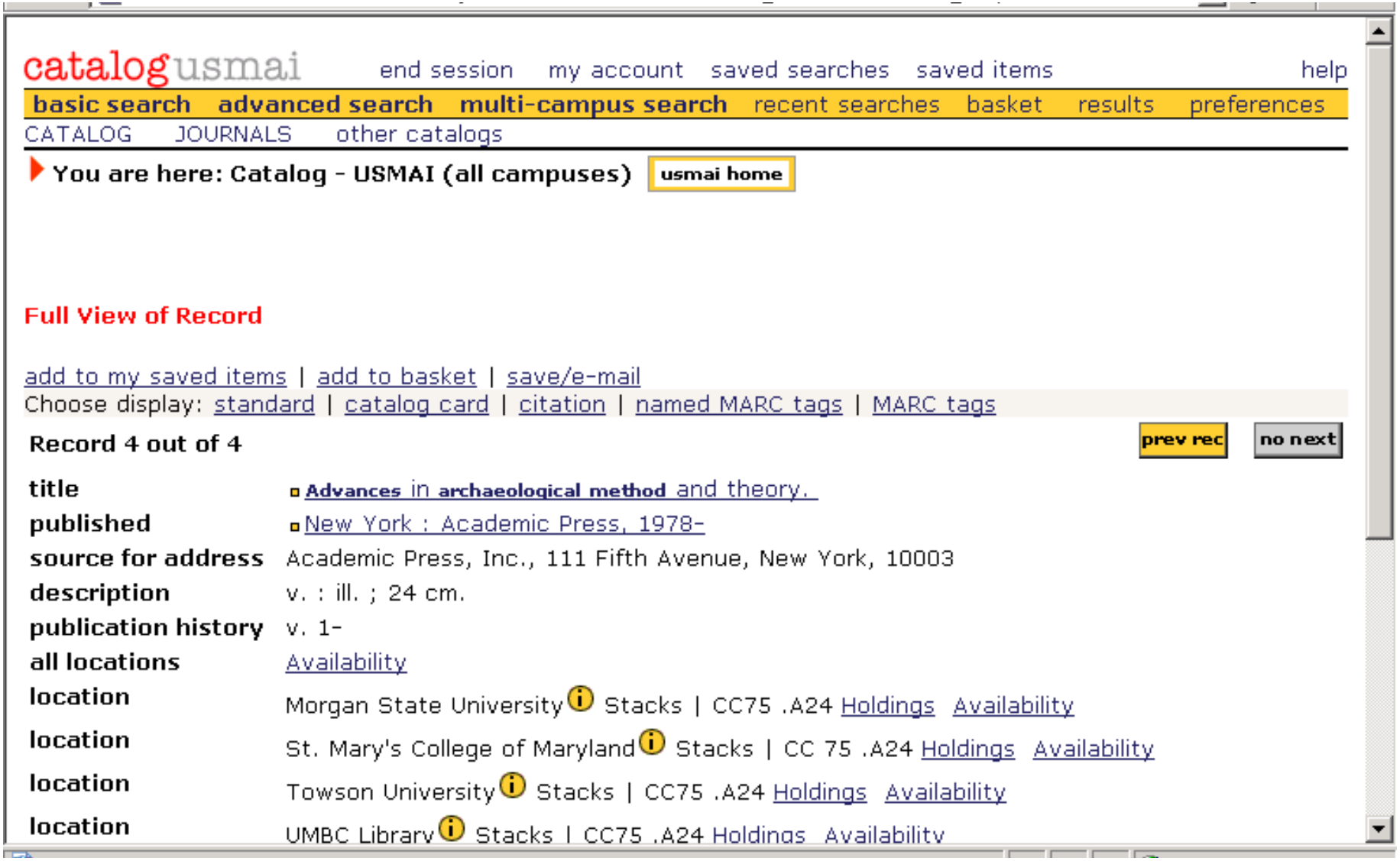
Any USMAI Sublibrary can be selected as the Pick-Up Location, unless a copy is 'on shelf' at the desired site



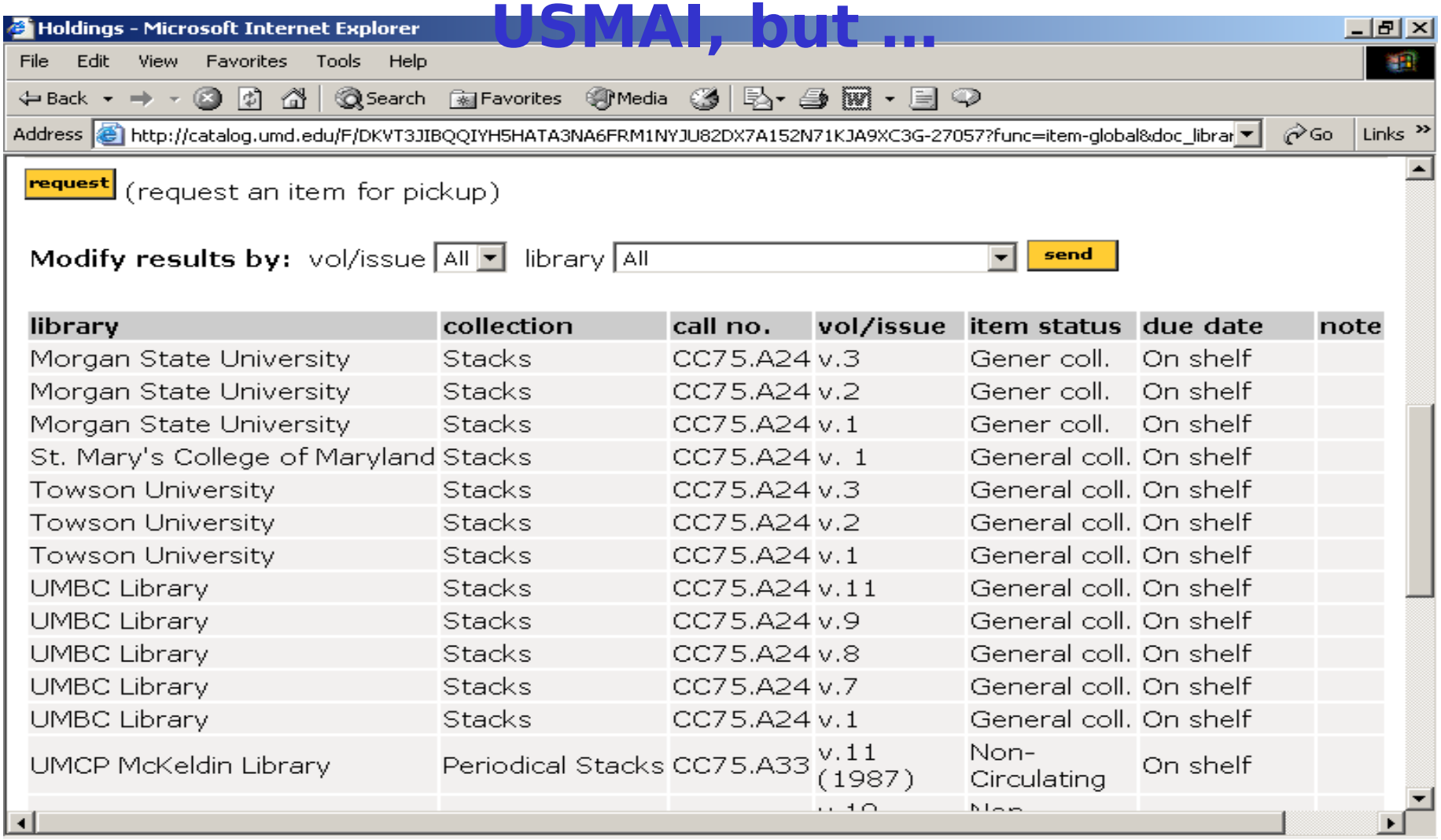
The requester is informed immediately if the hold request is successful



Hold requests can also be placed on volumes in multi-volume sets

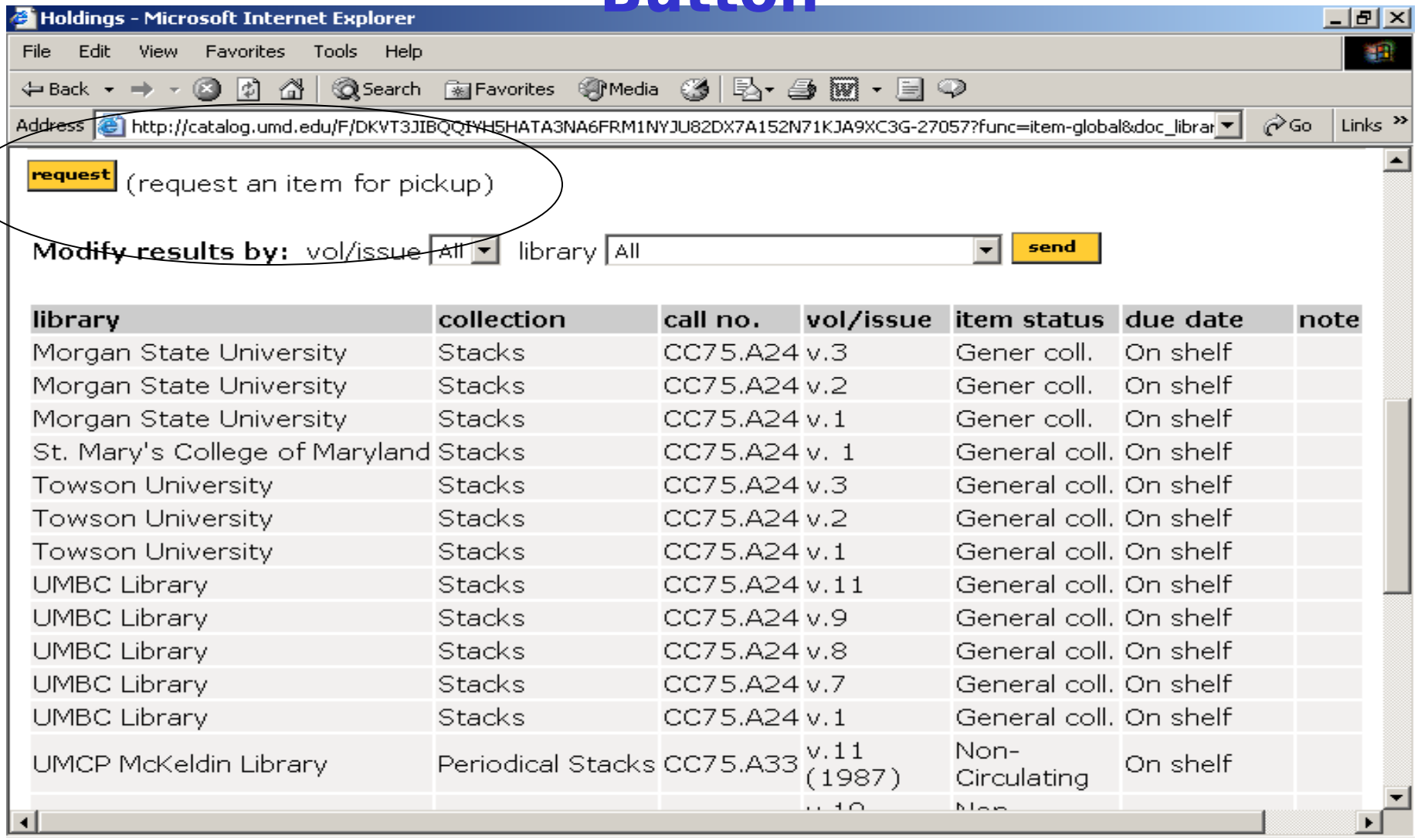


The Holdings Record will display the circulation status of each volume in the USMAI, but …



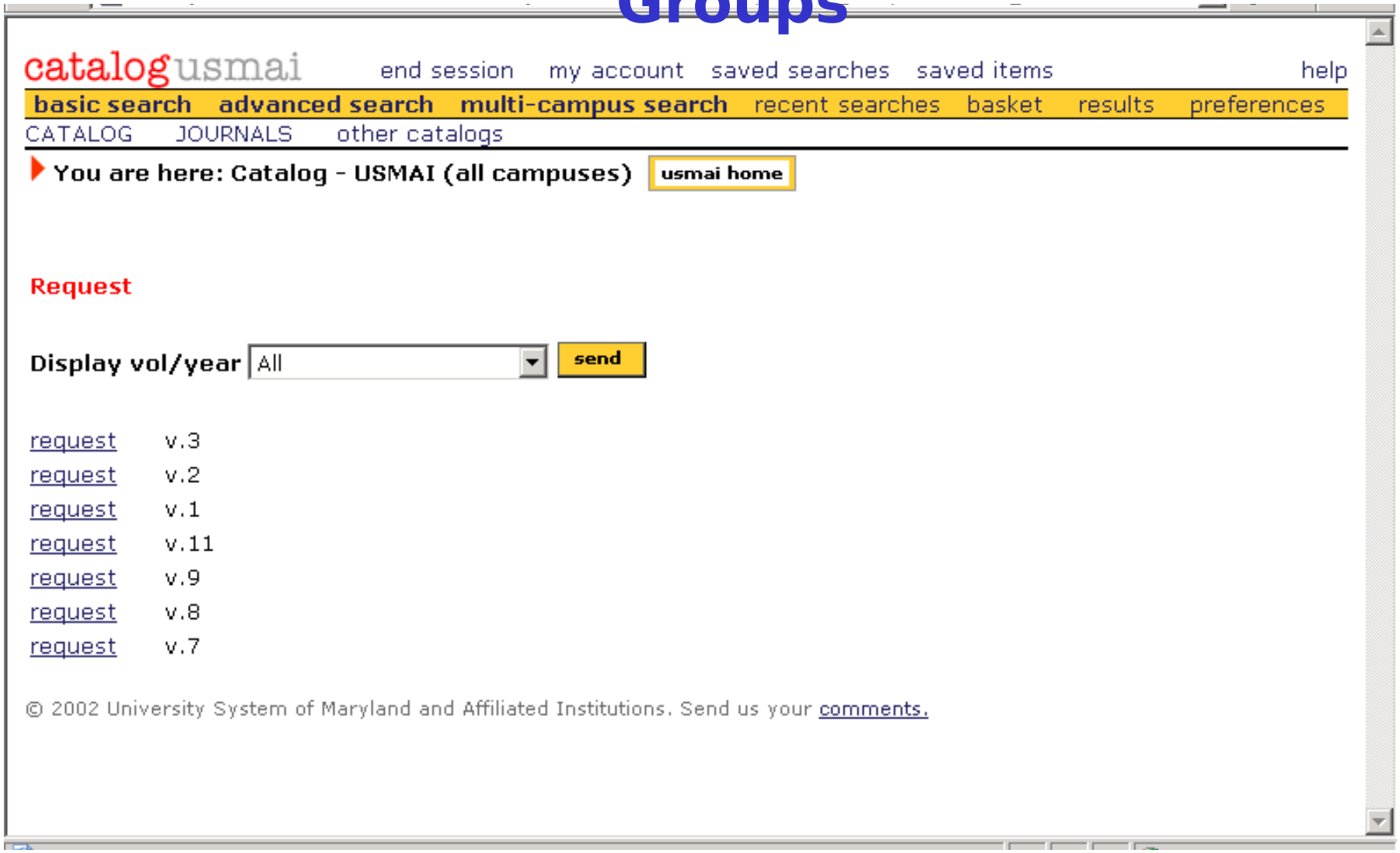
library	collection	call no.	vol/issue	item status	due date	note
Morgan State University	Stacks	CC75.A24	v.3	Gener coll.	On shelf	
Morgan State University	Stacks	CC75.A24	v.2	Gener coll.	On shelf	
Morgan State University	Stacks	CC75.A24	v.1	Gener coll.	On shelf	
St. Mary's College of Maryland	Stacks	CC75.A24	v. 1	General coll.	On shelf	
Towson University	Stacks	CC75.A24	v.3	General coll.	On shelf	
Towson University	Stacks	CC75.A24	v.2	General coll.	On shelf	
Towson University	Stacks	CC75.A24	v.1	General coll.	On shelf	
UMBC Library	Stacks	CC75.A24	v.11	General coll.	On shelf	
UMBC Library	Stacks	CC75.A24	v.9	General coll.	On shelf	
UMBC Library	Stacks	CC75.A24	v.8	General coll.	On shelf	
UMBC Library	Stacks	CC75.A24	v.7	General coll.	On shelf	
UMBC Library	Stacks	CC75.A24	v.1	General coll.	On shelf	
UMCP McKeldin Library	Periodical Stacks	CC75.A33	v.11 (1987)	Non-Circulating	On shelf	

The requester still initiates the hold process by clicking on the Request Button

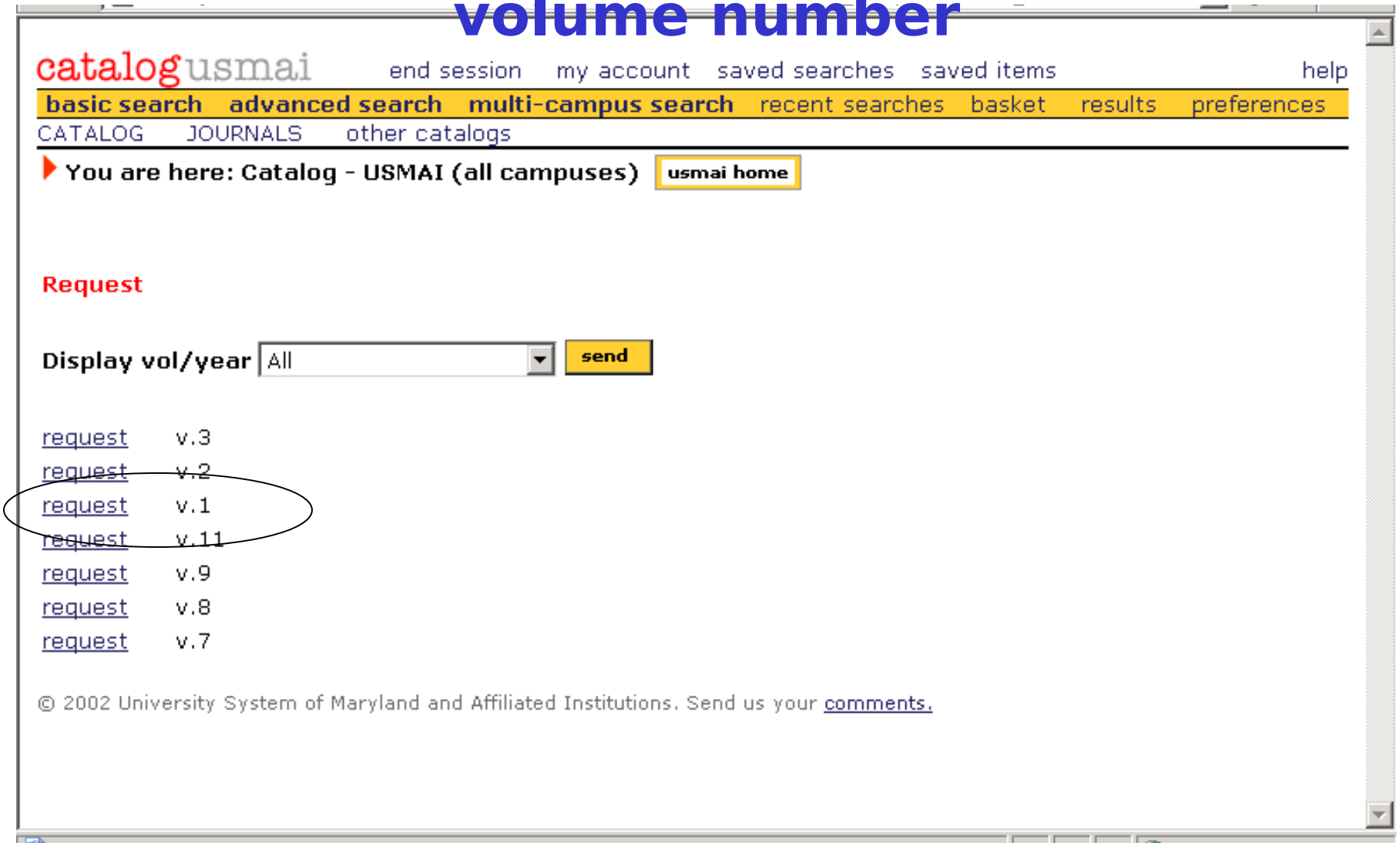


library	collection	call no.	vol/issue	item status	due date	note
Morgan State University	Stacks	CC75.A24	v.3	Gener coll.	On shelf	
Morgan State University	Stacks	CC75.A24	v.2	Gener coll.	On shelf	
Morgan State University	Stacks	CC75.A24	v.1	Gener coll.	On shelf	
St. Mary's College of Maryland	Stacks	CC75.A24	v. 1	General coll.	On shelf	
Towson University	Stacks	CC75.A24	v.3	General coll.	On shelf	
Towson University	Stacks	CC75.A24	v.2	General coll.	On shelf	
Towson University	Stacks	CC75.A24	v.1	General coll.	On shelf	
UMBC Library	Stacks	CC75.A24	v.11	General coll.	On shelf	
UMBC Library	Stacks	CC75.A24	v.9	General coll.	On shelf	
UMBC Library	Stacks	CC75.A24	v.8	General coll.	On shelf	
UMBC Library	Stacks	CC75.A24	v.7	General coll.	On shelf	
UMBC Library	Stacks	CC75.A24	v.1	General coll.	On shelf	
UMCP McKeldin Library	Periodical Stacks	CC75.A33	v.11 (1987)	Non-Circulating	On shelf	

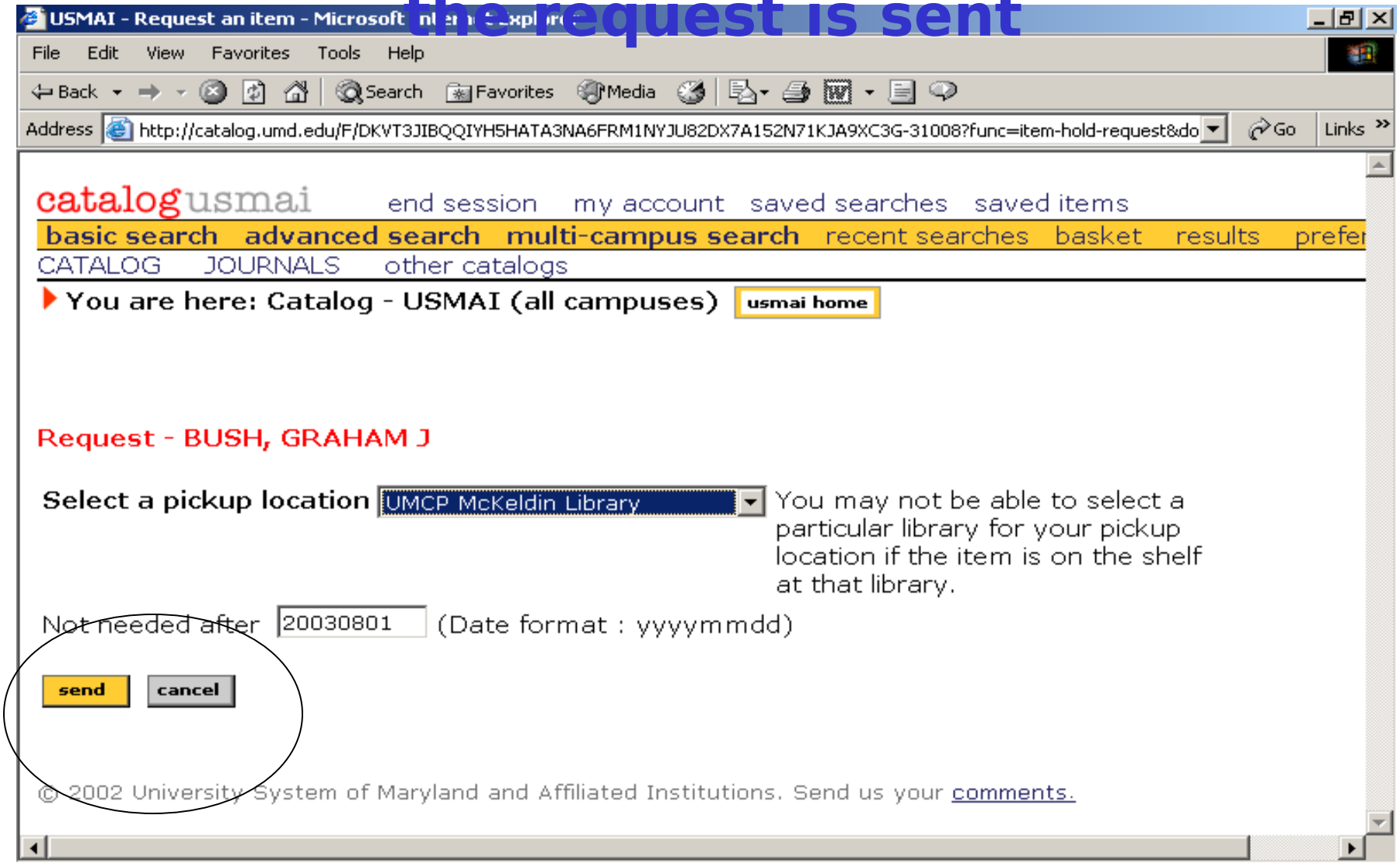
Aleph filters out all ineligible items and groups like volumes together into ‘Hold Groups’



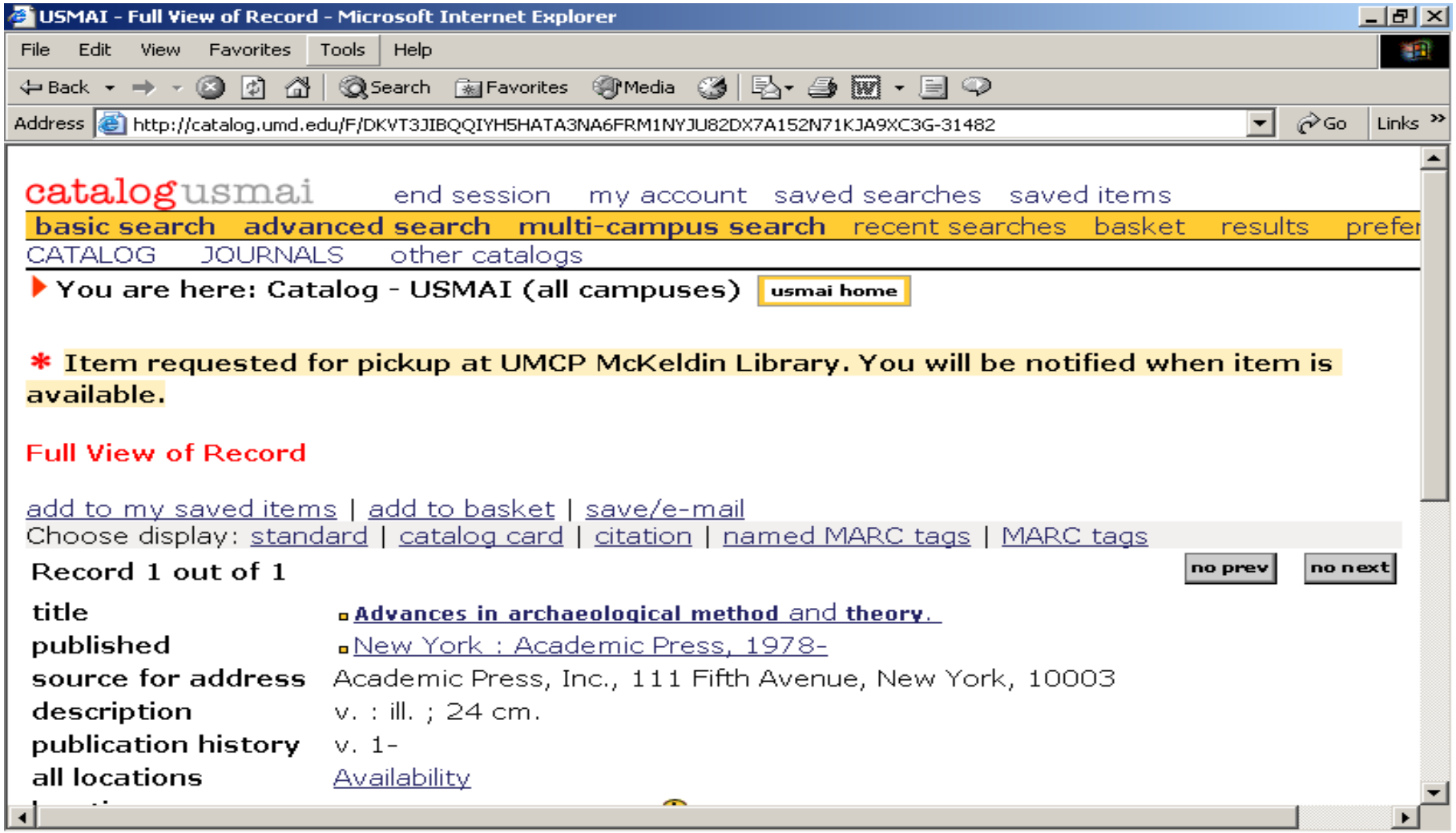
The requester selects the desired volume by clicking on the Request Link next to the volume number



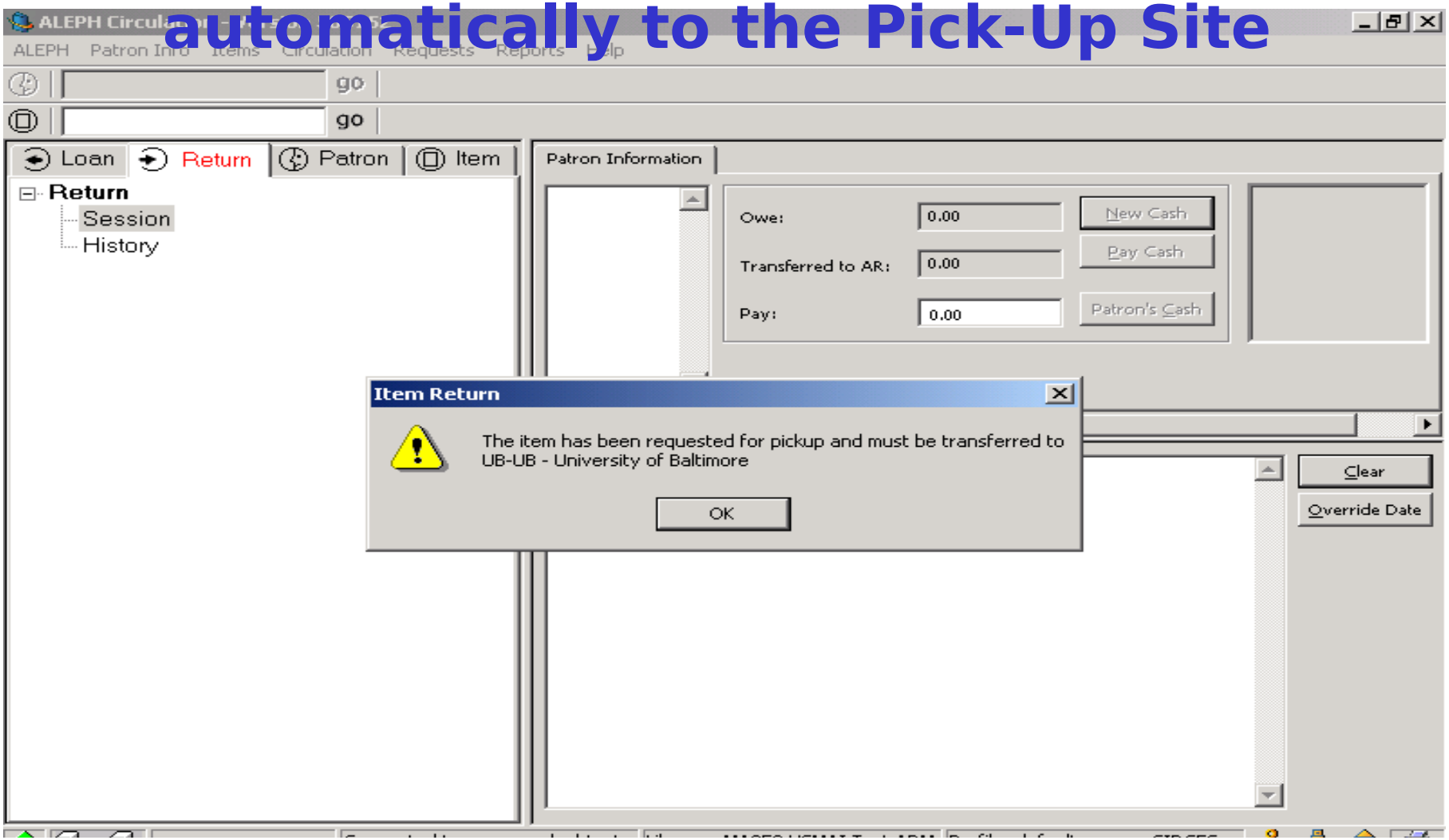
Once the requester has selected the volume, the Pick-Up Site is chosen and the request is sent



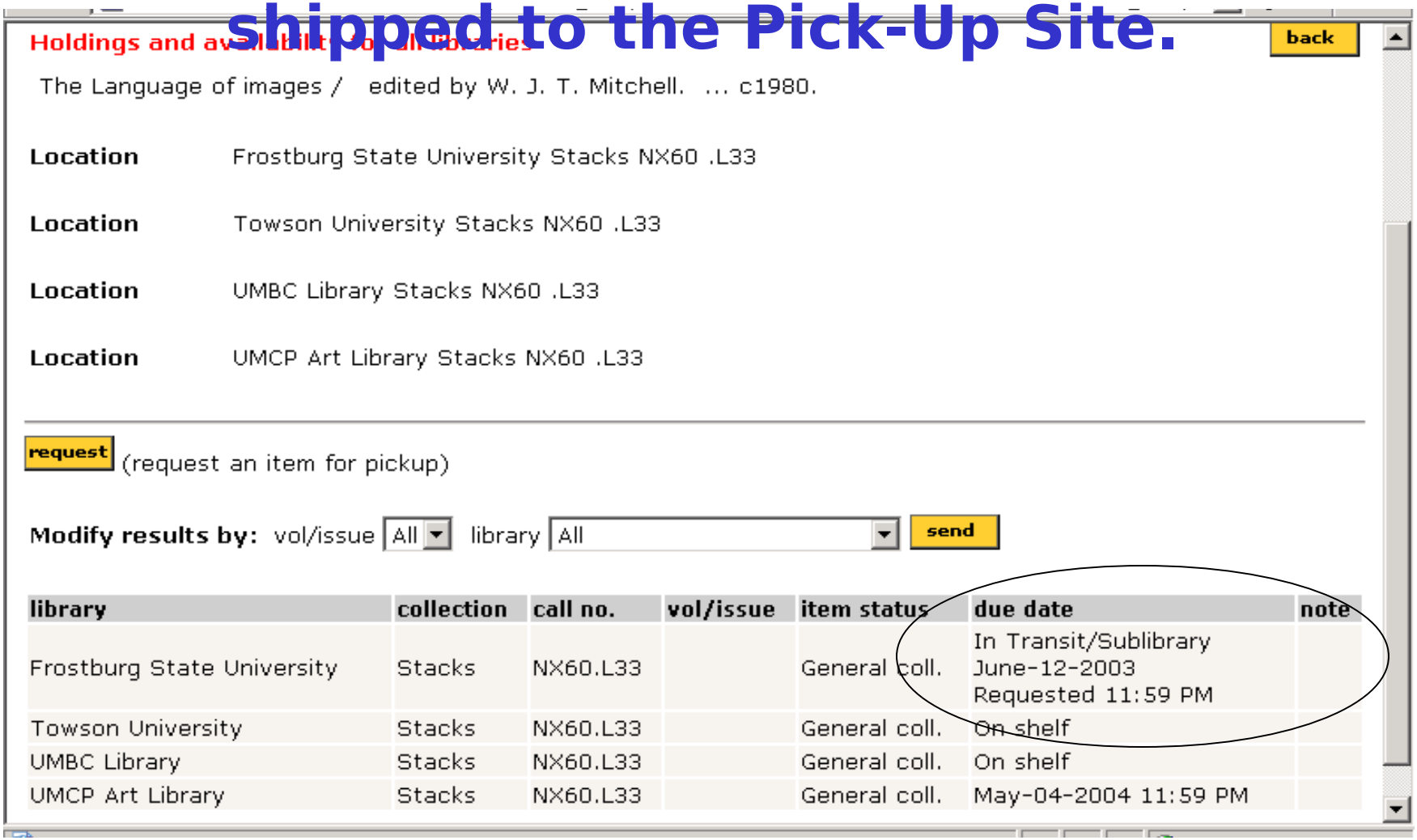
If there is at least one eligible copy of that volume in the USMAI, the request will be successful



The first copy of the requested title to be returned at any USMAI Circulation Site will be placed intransit automatically to the Pick-Up Site



The Item Record in the OPAC will reflect the status of the Hold Request. 'In Transit' means the item is being shipped to the Pick-Up Site.



Holdings and availability for all libraries

back

The Language of images / edited by W. J. T. Mitchell. ... c1980.

Location Frostburg State University Stacks NX60 .L33

Location Towson University Stacks NX60 .L33

Location UMBC Library Stacks NX60 .L33

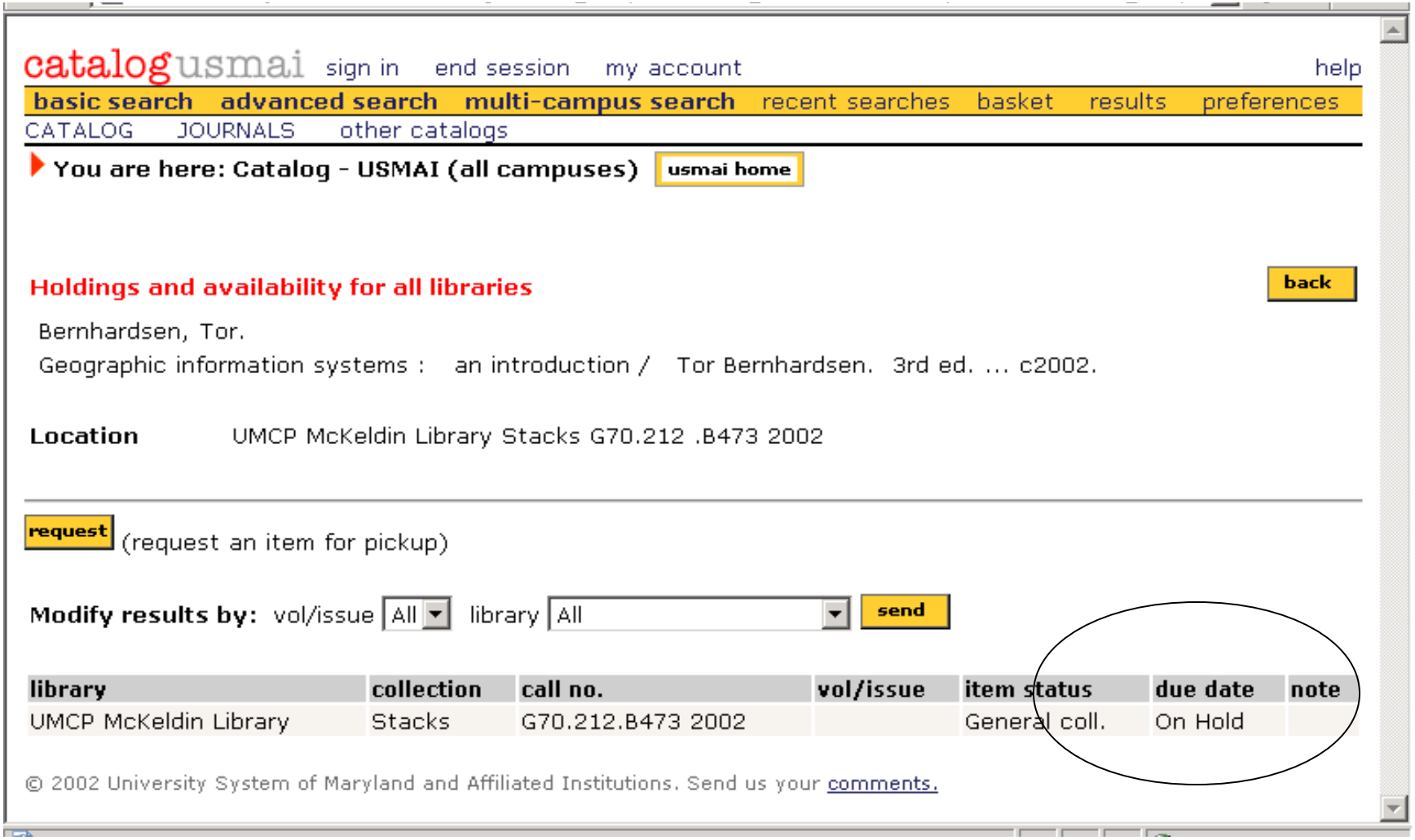
Location UMCP Art Library Stacks NX60 .L33

request (request an item for pickup)

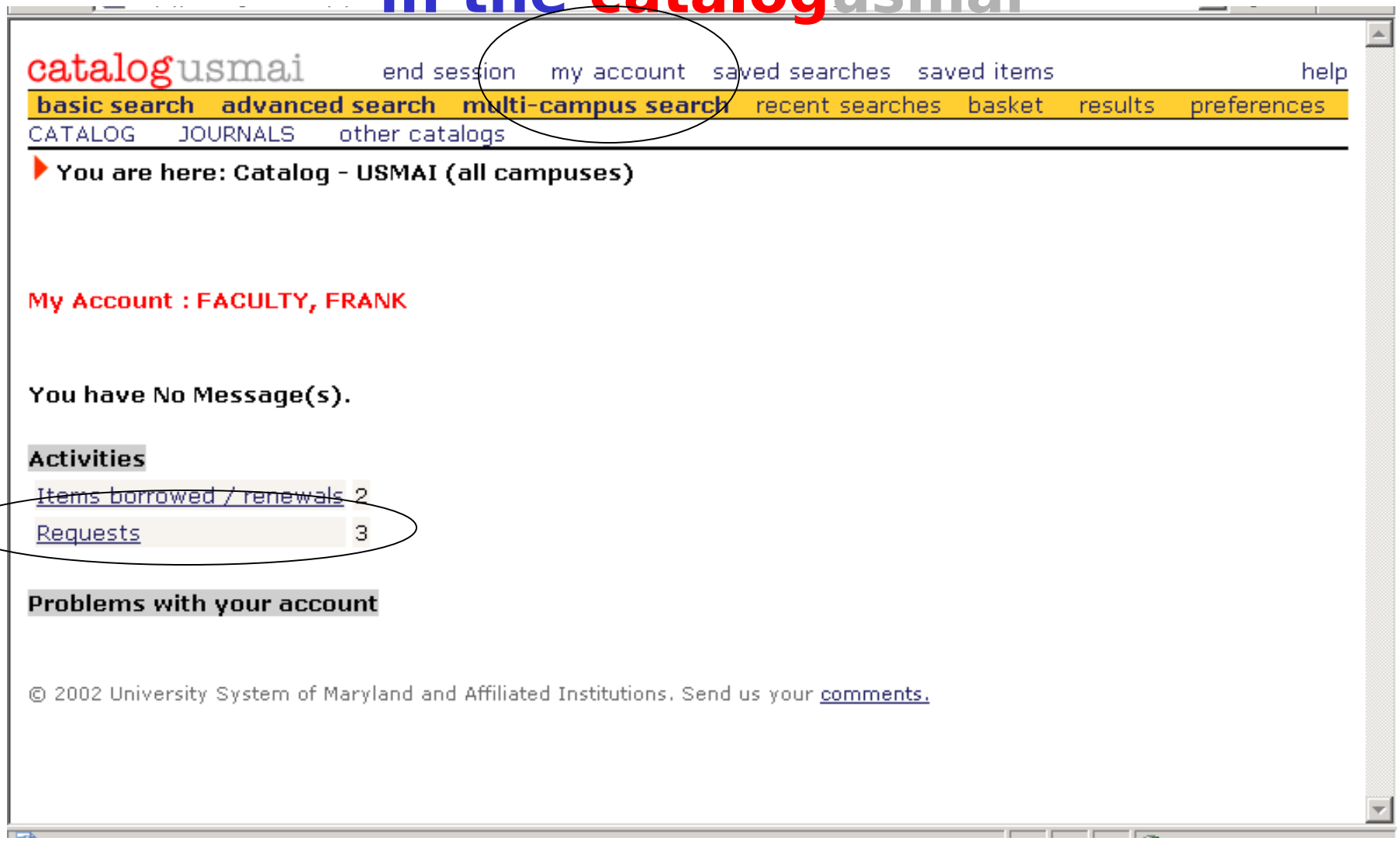
Modify results by: vol/issue All library All send

library	collection	call no.	vol/issue	item status	due date	note
Frostburg State University	Stacks	NX60.L33		General coll.	In Transit/Sublibrary June-12-2003 Requested 11:59 PM	
Towson University	Stacks	NX60.L33		General coll.	On shelf	
UMBC Library	Stacks	NX60.L33		General coll.	On shelf	
UMCP Art Library	Stacks	NX60.L33		General coll.	May-04-2004 11:59 PM	

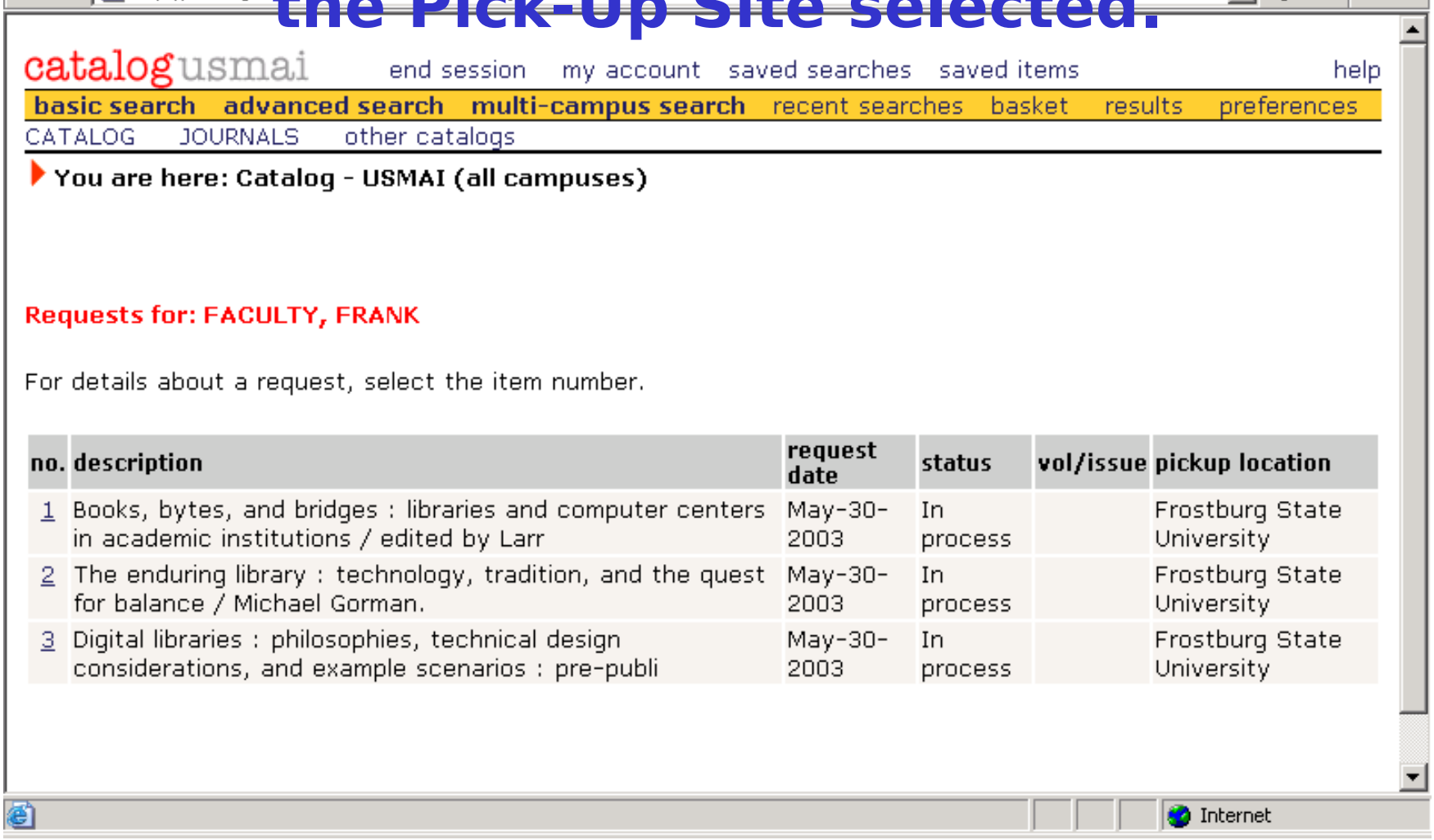
The ‘On Hold’ status means that the Item is on the Hold Shelf at the Pick-Up Location



Requesters can review their own Hold Requests using the My Account feature in the catalogusmai



In My Account, the Requester can verify the title that was requested, when the hold was placed, the Hold's status and the Pick-Up Site selected.



catalogusmai end session my account saved searches saved items help

basic search advanced search multi-campus search recent searches basket results preferences

CATALOG JOURNALS other catalogs

You are here: Catalog - USMAI (all campuses)

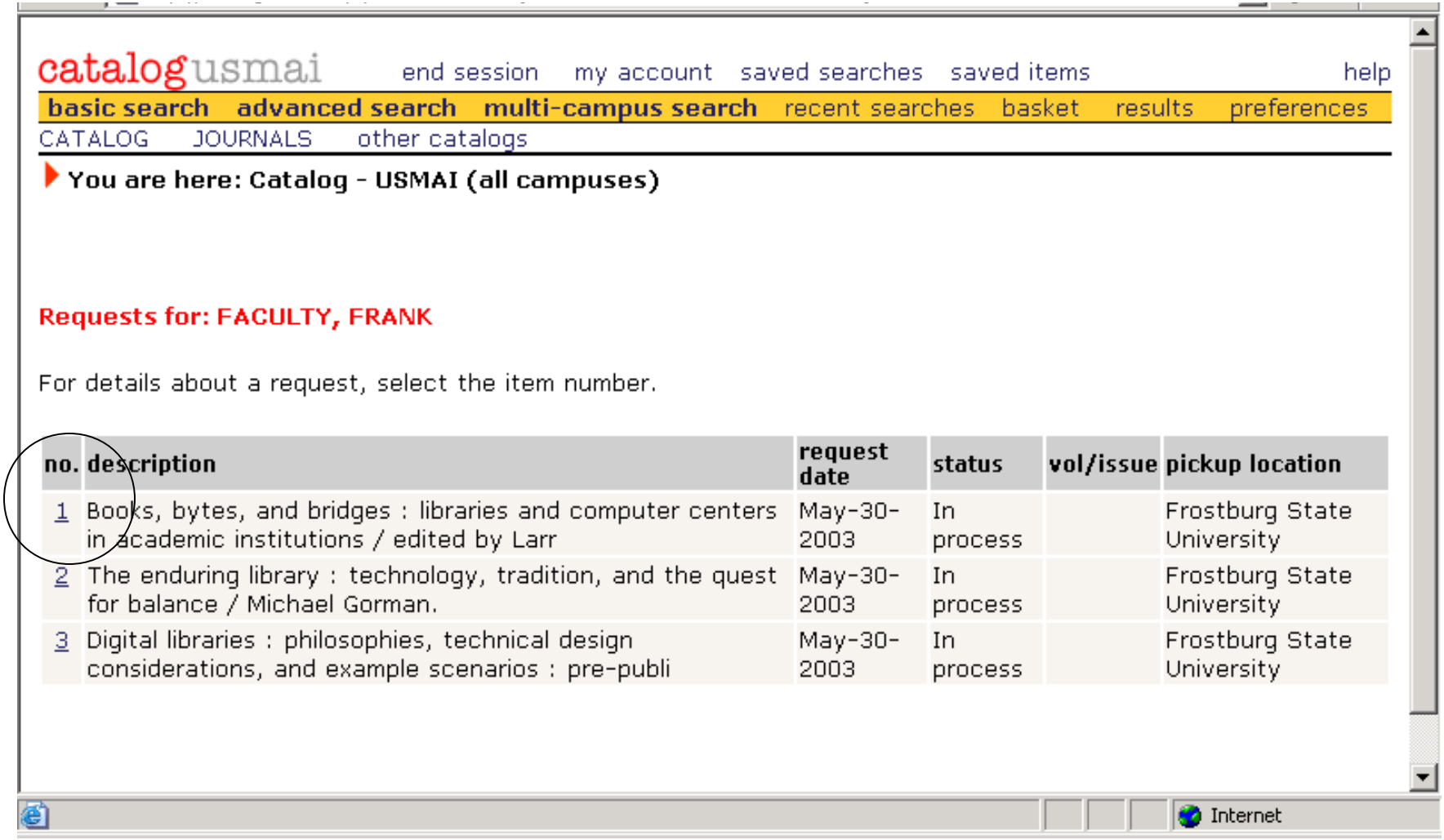
Requests for: FACULTY, FRANK

For details about a request, select the item number.

no.	description	request date	status	vol/issue	pickup location
1	Books, bytes, and bridges : libraries and computer centers in academic institutions / edited by Larr	May-30-2003	In process		Frostburg State University
2	The enduring library : technology, tradition, and the quest for balance / Michael Gorman.	May-30-2003	In process		Frostburg State University
3	Digital libraries : philosophies, technical design considerations, and example scenarios : pre-publi	May-30-2003	In process		Frostburg State University

Internet

Finally, by clicking on the Line Number Link next to the title, …



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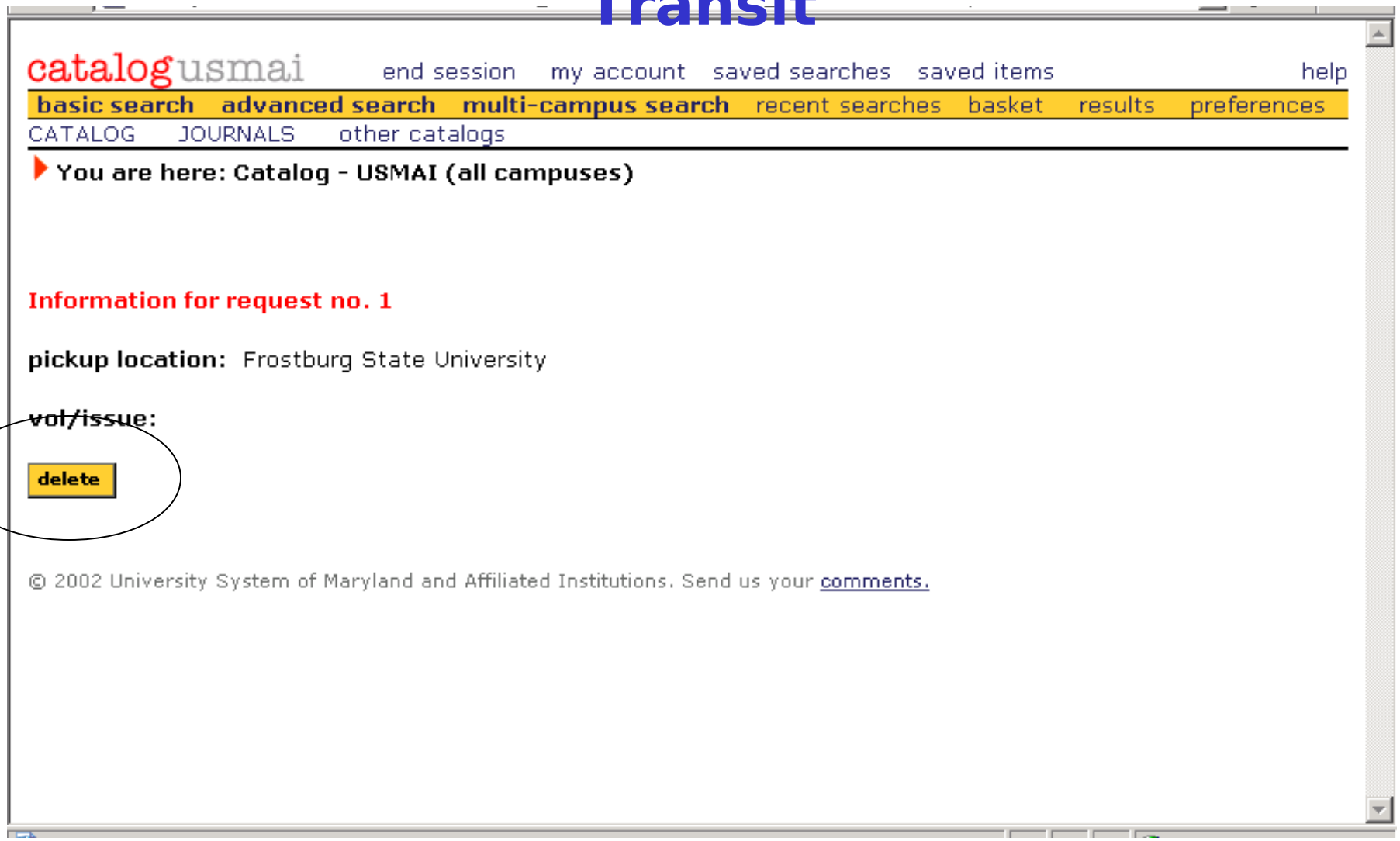
the Requester can delete the Hold Request before the item is shipped In Transit