

SECTION XVI: APPENDIX I – LOCAL HOLDS

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The Local Hold/Use status can be used by libraries to make their new items available for local patrons to place holds on or for walk-in patrons to check out. No library is required to apply Local Hold/Use parameters to their materials. The Local Hold parameters can be used for up to 60 days. After 60 days, the parameters should be changed so that the item can fill holds for patrons from any other LINKcat library.

A. Items Eligible for Local Hold parameters

New items

Only **newly-purchased** items should receive Local Hold parameters.

On Order items

Libraries should **not** apply Local Hold parameters to **On Order** item records. Only apply them after the item is in hand and being processed. New items should not be assigned Local Hold parameters until the items have been received in hand by the library. This means that item records with an On Order status should not have a Local Holds Item Type, unless the new items have been received by the library.

Formats

As of February 2025, the **only** materials eligible for Local Holds are:

- Regular print adult books
- Children’s picture books
- Newly published large print adult books
- Newly released DVDs (7 day loan)

B. Creating item records with the Local Hold parameters

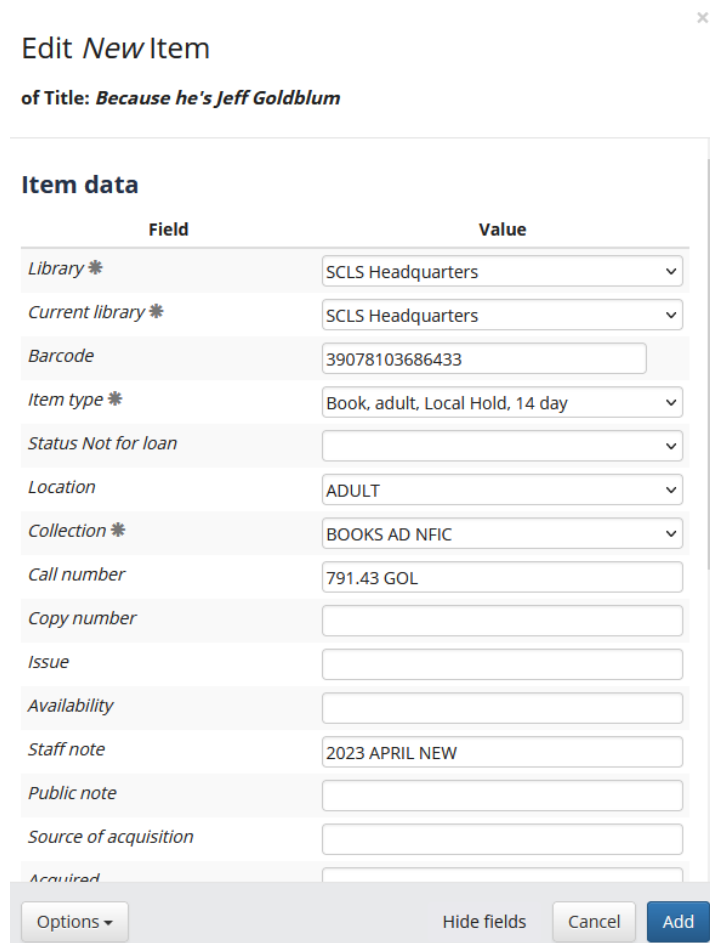
Use the searching/matching and linking instructions in the [Linking Manual](#) for the item’s format to find an existing bibliographic record in the catalog that matches your Local Hold item, and link your item using the Local Hold parameters listed below.

If there isn’t a matching bibliographic record for your Local Hold item, create a BSE following the instructions in the [Linking Manual](#) for the item’s format, and link your item using the Local Hold parameters listed below. Then, create a **dummy item** record along with the item record with Local Hold

parameters. (A dummy item record will allow all LINKcat patrons to place holds, but the Local Hold item will fill holds for only your library’s local patrons.) See further below for **dummy item** instructions.

General instructions on how to link items can be found in [Section XII, Linking Items](#) of the Linking Manual.

1. In the Edit Item popup, fill out the item record with these specific fields and values (the “Local Hold parameters”):
 - a. **Item Type:**
 - i. Adult books: Book, adult, Local Hold, 14 day
 - ii. Children’s books: Book, juvenile, Local Hold, 14 day
 - iii. DVDs: DVD, Local Hold, 7 day loan
 - b. **Collection Code:**
 - i. Any acceptable collection code for the format of item
 - c. **Staff Note (Optional):** “YYYY MONTH NEW”
 - i. For example, “2023 APRIL NEW”
 - ii. This is only required for libraries that will use the On Demand report for Local Holds/Use Items.
 - d. Other fields, such as **Barcode, Location, Call Number, Copy Number**, etc. can be filled out as usual.
 - e. The item record will appear similar to this when filled out:



The screenshot shows a window titled "Edit New Item" with a close button (x) in the top right corner. Below the title is the text "of Title: *Because he's Jeff Goldblum*". The main content area is titled "Item data" and contains a table with two columns: "Field" and "Value".

Field	Value
Library *	SCLS Headquarters
Current library *	SCLS Headquarters
Barcode	39078103686433
Item type *	Book, adult, Local Hold, 14 day
Status Not for loan	
Location	ADULT
Collection *	BOOKS AD NFIC
Call number	791.43 GOL
Copy number	
Issue	
Availability	
Staff note	2023 APRIL NEW
Public note	
Source of acquisition	
Acquired	

At the bottom of the window, there are four buttons: "Options" (with a dropdown arrow), "Hide fields", "Cancel", and "Add".

- Once the item record is filled out, click **Add** at the bottom of the **Edit Item** popup to save and add the item.
- On the side of the bibliographic record, click **Item Statuses**.
- Find your library's Local Hold item in the list of items.
- Click on the dropdown next to **Custom statuses** for this item, and choose **Local Hold**.
- The **Item Statuses** page should look like this once the **Local Hold** status is added:

Barcode 39078103686433 ▾

Item information [Edit] [Print Spine Label]

Itemnumber: 7121927
 Home library: SCLS Headquarters
 Itemtype: Book, adult, Local Hold, 14 day
 Shelving location: ADULT
 Collection: BOOKS AD NFIC
 Callnumber: 791.43 GOL
 Replacement price:

Circ Status

Current location: SCLS Headquarters
 Checkout status: Available
 Lost status: ▾
 Damaged status: ▾
 Custom statuses (1): Local Hold (04/26/2023) ✕
 Apply custom status ▾

- Finish processing the item with any labels to indicate a **New** or **Local Hold** item.

Once the item record is filled out and its Local Hold status is set, the item record should appear with both an Available and Local Hold status in both the staff and public views of the catalog. This combination of information lets staff and patrons know that the item is in the library and available for a walk-in checkout or to fill a local hold.

The **Local Hold** status will **not** be removed by Check Out or Check In.

Library									
SCLS Headquarters									
▼	🔗	Current library	Barcode	Item type	Location	Collection	Call number	Availability	Staff note
Status		SCLS Headquarters	39078103686433	Book, adult, Local Hold, 14 day	ADULT	BOOKS AD NFIC	791.43 GOL	Available Local Hold	2023 APRIL NEW

Library ^	Location	Collection	Call number	Copy number	Availability
SCLS Headquarters	ADULT	BOOKS AD NFIC	791.43 GOL		Available Local Hold

Dummy Item Record

If the library has to create a BSE for their Local Hold item that is the first item in the system, the library should add a dummy item record with a regular item type (in addition to the item with Local Hold parameters) in order to allow all patrons to place holds on the title. SCLS staff will remove dummy items that are no longer needed.

To add a dummy item to a record, follow these steps after creating the Local Hold item record.

1. On the **Edit Items** page, click the **button** next to the Local Hold item record as if to edit it.
2. Click on **Clone Item**.
3. An **Edit New Item** popup will come up.
4. Change these fields to make it a dummy item (other fields can be left alone or blank)
 - a. **Barcode**: clear out any barcode from the Local Hold item
 - b. **Item Type**: Book, adult, 14 day
 - c. **Status Not for loan**: On Order Non-ACQ
 - d. **Staff Note**: LOCAL HOLD DUMMY ITEM
5. The dummy item record will appear similar to this when filled out:

✕

Edit *New* Item

of Title: *Because he's Jeff Goldblum*

Item data

Field	Value
<i>Library</i> *	SCLS Headquarters
<i>Current library</i> *	SCLS Headquarters
<i>Barcode</i>	
<i>Item type</i> *	Book, adult, 14 day loan
<i>Status Not for loan</i>	On Order Non-ACQ
<i>Location</i>	ADULT
<i>Collection</i> *	BOOKS AD NFIC
<i>Call number</i>	791.43 GOL
<i>Copy number</i>	
<i>Issue</i>	
<i>Availability</i>	
<i>Staff note</i>	LOCAL HOLD DUMMY ITEM
<i>Public note</i>	
<i>Source of acquisition</i>	
<i>Acquired</i>	

Options ▾ Hide fields Cancel Add

6. Click **Add** at the bottom of the **Edit Item** popup to save and add the item.

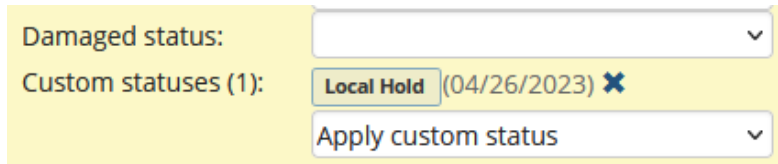
C. Removing Local Hold parameters from item records

The **Local Hold** parameters can be applied to materials for up to 60 days. To remove the parameters, libraries will edit materials by changing the **Item Type** to a “regular” item type for the material and remove the “Local Hold” **Custom Item status**.

AFTER 60 DAYS, you will **need** to edit the item parameters to change the item to regular parameters.

Removing parameters from individual items

1. Navigate to the bibliographic record the Local Hold item is on.
2. On the **Edit Items** page, click on the **button** to edit the Local Hold item.
3. Change the **Item Type** to *Book, Adult, 14 day; Book, Adult, 28 day; DVD, 7 day loan*; or whatever its permanent Item Type will be
4. Remove the Local Hold **staff note** if one was added.
5. **Save** the item record.
6. Click **Item Statuses** on the side of the page.
7. Find your library’s Local Hold item in the list of items.
8. Click on the **x** next to the **Local Hold custom status** to remove it.



The screenshot shows a yellow highlighted area of a web interface. It contains three elements: a 'Damaged status:' dropdown menu, a 'Custom statuses (1):' section with a 'Local Hold (04/26/2023)' status and a blue 'x' icon to its right, and an 'Apply custom status' dropdown menu.

9. Check in the item. It may be trapped to fill another hold at your library, a hold at another library, or will remain at your library to be shelved.

Removing parameters from multiple items (using Batch Item Edit)

To remove the **Local Hold** parameters from multiple items at the same time, the **Batch Item Editor** can be used. A **Batch Item Editor** list can be created through an **On Demand** report if there is a **Staff Note** in all of your **Local Hold** items, or items can be scanned into the **Batch Item Editor** manually to create the batch list.

Using the On Demand report

1. Click **More**, then **Reports** at the top of the screen in **Bibliovation**.
2. Click on **SQL Reports**.
3. Click on **Filter list with tag...**, and choose **On Demand**.
4. Locate the report titled “**0 CR – Local Holds/Use Items**”.
 - a. You may have to click **No Pager** at the top of the reports, or go to another page in the list of reports to find it.
5. Click **Run**.
6. A pop up will come up. Fill it in as follows:
 - a. **HOMEBRANCH**: your library’s code in single quotes – 'ACL', 'BAR', etc.

- b. **STAFFNOTE:** the staff note for the month you are changing in single quotes with % around it just in case other information may be in the field – '%2023 APRIL NEW%', etc.

×

Report Parameters

This report has free parameters. Please fill in values below.

HOMEBRANCH	<input type="text" value="'SCA'"/>
STAFFNOTE	<input type="text" value="'%2023 APRIL NEW%'"/>

7. Click **Start** to run the report.
8. Once the report has been ran, click on the “i” icon for your report.
 - a. If there are multiple report results, you can tell which was run by you by checking if it has an “x” for the list to be deleted, or you can check the time the report was ran.
9. View the items in the list to make sure they are accurate.
10. If you want to remove the Local Holds parameters from *every* item in the results, click **Export to...**, then **Item List**, above the list of items. A list in the **Batch Item Editor** will be created directly from the report results. The list in the **Batch Item Editor** will be named after the name of the report.
11. If you want to remove the Local Hold parameters from only *certain* items in the list, click **Export to...**, then **Excel spreadsheet**, to manually copy which barcodes to batch edit from Excel.
 - a. Barcodes could also be copied directly from the report results.

Removing Local Hold parameters with the Batch Item Editor

Whether the Batch Item Editor list is created through the report or manually, the list will be processed in the same way.

General instructions on using the Batch Item Editor can be found in Part E, Batch edit of items in [Section XIV, Editing, Moving, and Deleting Items](#) of the Linking Manual.

1. After the list has been created in the **Batch Item Editor**, click on its **name**.
2. Click **Process**, then **Modify Items**.
3. Fill out the pop up as follows:
 - a. **Field:** Item Type
Action: Set To
Value: Book, adult, 14 day loan (BKA14); Book, adult, 28 day loan (BKA28); DVD, 7 day loan (DVD7); or whatever its permanent Item Type will be
 - b. **Field:** Custom Item Status
Action: Remove Status
Value: Local Hold
 - c. **Field:** Staff note
Action: Set NULL

Value: n/a

(if staff note is used)

4. Click **Save Settings**, then **Process**. The items will be updated in BiblioVation.
5. Remove any Local Hold labeling from the physical items, if there is any.
6. Check in the items. They may be trapped to fill another hold at your library, a hold at another library, or will remain at your library to be shelved.