



MSC Quarterly Webinar:  
Managing Holds  
February 27, 2025

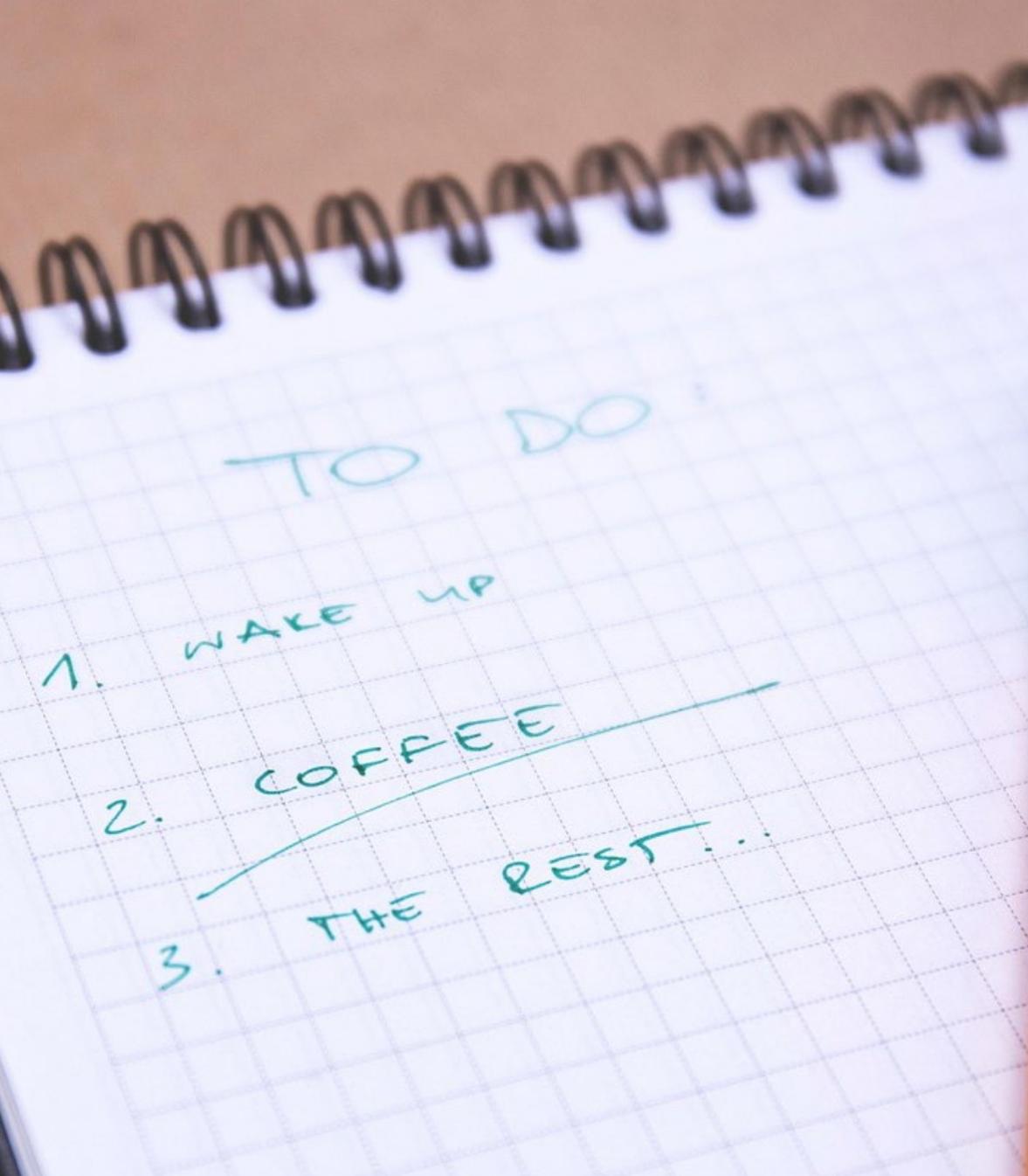


Image by [StockSnap](#) from [Pixabay](#).

During this session, we will cover:

- How holds work in the Symphony ILS
- How patrons place and manage holds
- Managing holds in WorkFlows
- Holds reports in BLUEcloud Analytics (BCA)
- Common holds issues and how to fix them

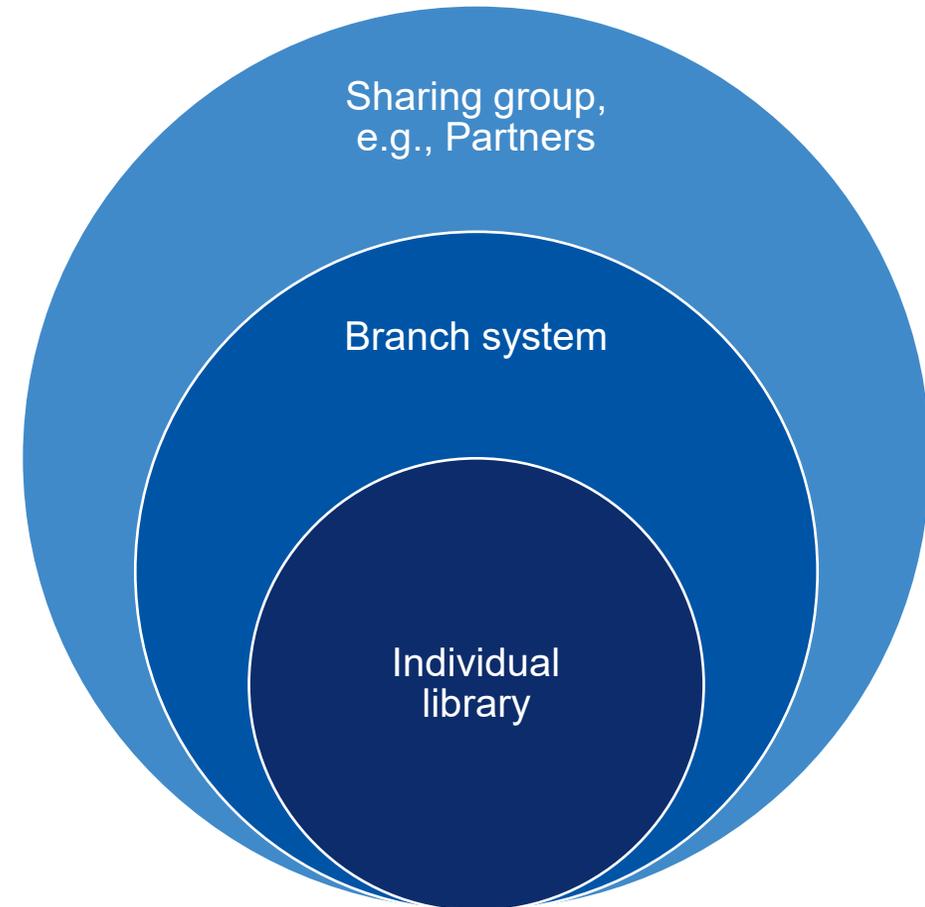
# How Holds Work in the Symphony ILS



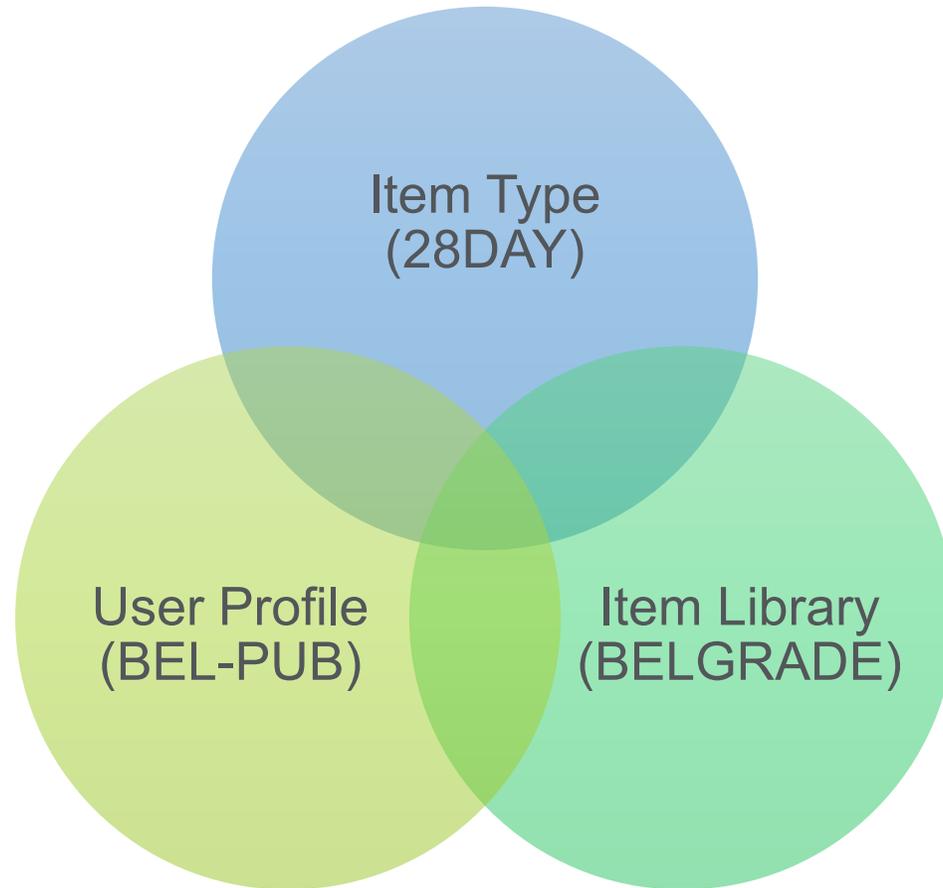
# What are holds? Why have them?



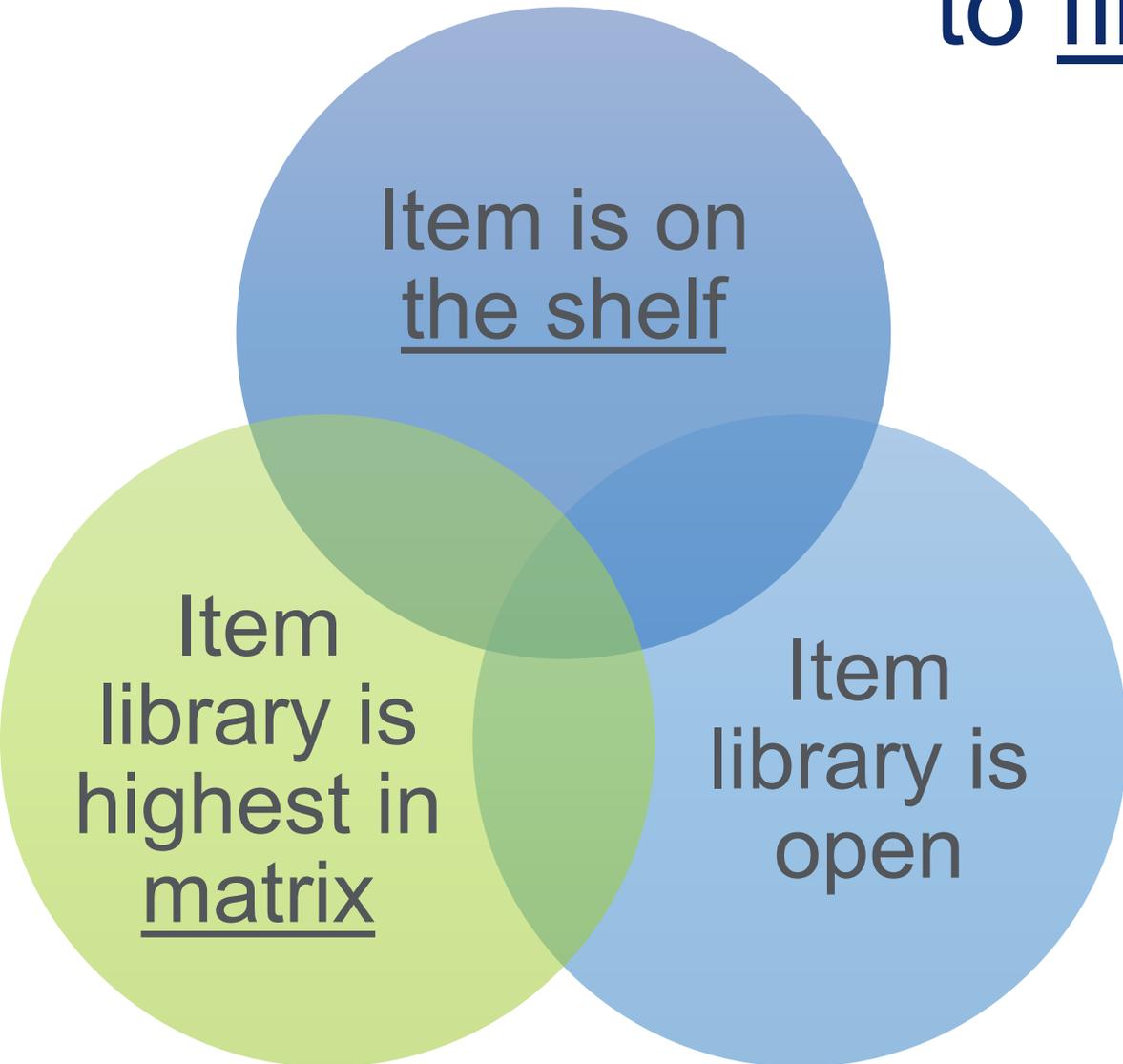
Image by [David](#) from [Pixabay](#).



# How the system knows to allow a hold



# How the system chooses an item to fill a hold

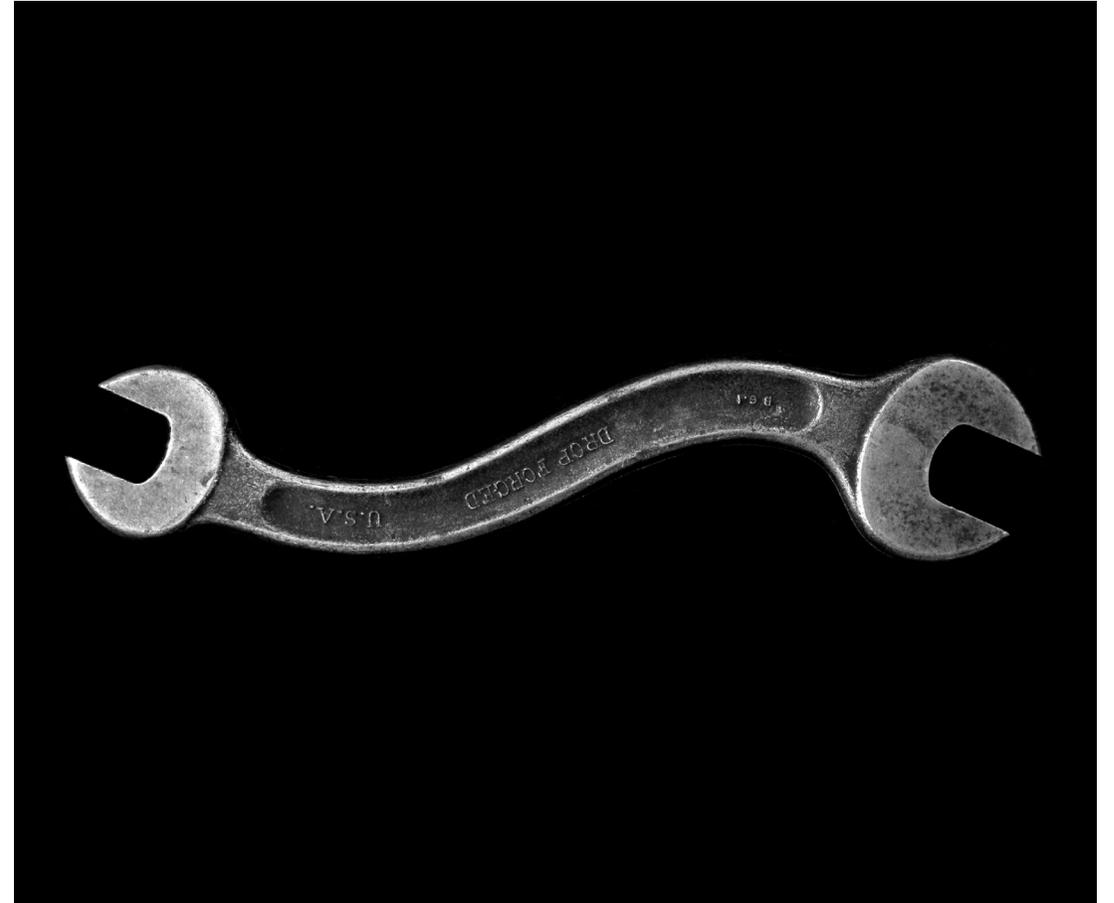


Belgrade Library's hold matrix:

1. Belgrade
2. Bozeman
3. Manhattan
4. Three Forks
5. West Yellowstone

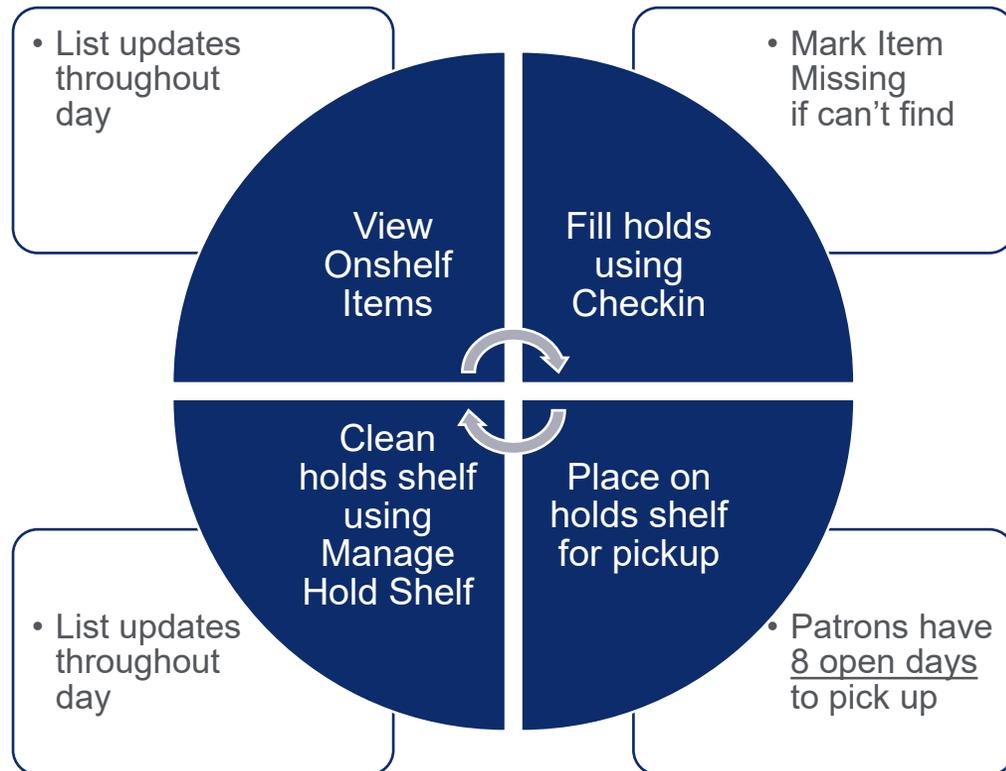
# A wrench in the works

- **Scenario:** Belgrade's onshelf items list contains an item that needs to transit to Bozeman, but staff at West Yellowstone **check in** an item that qualifies to fill that hold before Belgrade staff do, the system will grab the West Yellowstone copy.
- **Exception:** if the hold is for pickup at Belgrade and Belgrade staff check in a qualifying item, the system will override and have the Belgrade item fill the hold instead.



# Best practices for staff

## Every day your library is open:



## Weekly and monthly reports:

- **Check Weekly (for sharing groups)**
  - List Transits TO / List Transits FROM (WorkFlows report only)
- **Check Monthly**
  - Reports to identify old holds, e.g., Unfilled Holds > 3 Months

# How Patrons Place and Manage Holds



# Patrons placing holds

## In Enterprise

The screenshot shows the Enterprise library system interface for the book "The buried giant". The book details include the author "Ishiguro, Kazuo, 1954-" and several subject categories: "Husband and wife -- Fiction.", "Quests (Expeditions) -- Fiction.", "Sons -- Fiction.", "Knights and knighthood -- Fiction.", and "Dragons -- Fiction.". In the top right corner, under the "Actions:" label, the "Place Hold" button is circled in orange. Below the book details, a modal window titled "Place Hold(s)" is open, showing a table with columns for "Title" and "Pickup Library:". The table contains one row with "The buried giant" and "Belgrade Community Library". A "Place Hold(s)" button is located at the bottom of the modal.

**The buried giant**  
**Author:** Ishiguro, Kazuo, 1954-  
**Subject:** Husband and wife -- Fiction.  
Quests (Expeditions) -- Fiction.  
Sons -- Fiction.  
Knights and knighthood -- Fiction.  
Dragons -- Fiction.

**The buried giant**

Place Hold(s)

Title	Pickup Library:
The buried giant	Belgrade Community Library

Place Hold(s)

## In MSC app

The screenshot shows the MSC app interface for the book "The buried giant". The book cover is displayed, featuring the author's name "Kazuo Ishiguro" and the title "The Buried Giant". Below the cover, the text reads "The buried giant by Ishiguro, Kazuo, 1954- author.". A "Place Hold" button is visible at the bottom of the book card. To the right, a "Place Hold" modal is open, showing a "SELECT PICKUP LOCATION" dropdown menu with "Belgrade Community Library" selected. A green "Place Hold" button is at the bottom of the modal.

Back Place Hold

SELECT PICKUP LOCATION

Select pickup location

Belgrade Community Library

Place Hold

Back

The buried giant  
by Ishiguro, Kazuo, 1954- author.

Place Hold

# Patrons managing holds

## In Enterprise

Personal Information | Checkouts | **Holds** | Fines

Library Holds

Items on Hold: 1  
Ready for Pickup: 0

Cancel Hold(s) | Edit Pickup Location(s) | Edit/Suspend Hold(s) | Cancel Hold Suspension(s)

Select All

		Title/Author	Status	Pickup at	Expires
<input type="checkbox"/>		The buried giant Ishiguro, Kazuo, 1954- author. Shelf Number: FIC ISHIGUR Item Barcode: 33773003836197	Pending	Belgrade Community Library	2/25/26

## In MSC app

Back | Holds | Refresh | Search

Select | All holds

PLACED

The buried giant  
Books

Pickup: Belgrade Community Library  
Author: Ishiguro, Kazuo, 1954- author.  
Expires on: 2/19/2026

View item

Change Pickup Location

Cancel Hold | Suspend Hold

# Relevant knowledge base articles

- [Common Tasks in Enterprise](#)
- [Common Tasks in the Montana Shared Catalog App](#)

# Managing Holds in WorkFlows Demo



# Relevant knowledge base articles

- [Placing Holds in WorkFlows](#)
- [Filling Holds in WorkFlows](#)
  - Includes information on marking items missing.
- [Cleaning the Holds Shelf from WorkFlows](#)
- [Modifying Holds in WorkFlows](#)
  - Includes changing pickup location and suspending/unsuspending.
- [Removing Holds in WorkFlows](#)

# Holds Reports in BLUEcloud Analytics (BCA)



# Shared Reports > Circulation > Holds

The screenshot displays a grid of report cards for 'Circulation > Holds'. Each card includes an icon (folder or table), a title, owner, modification date, and a brief description.

Report Title	Owner	Modified	Description
Filled Holds	MTSCAdmin	11/26/21 9:14:40 AM	
Placed Holds	MTSCAdmin	2/14/24 9:33:19 AM	
Top Holds	MTSCAdmin	6/19/24 3:33:37 PM	
Unfilled Holds	MTSCAdmin	2/5/25 10:08:10 AM	
Expired Holds List - MONTHLY	MTSCAdmin	11/26/21 9:04:18 AM	Dynamic date report. For example, if this report is run in November, it will return a list for October. This report includes many attributes off grid to allow for customized subscriptions. RK 21
Placed Holds List - DAILY	MTSCAdmin	11/26/21 9:08:11 AM	Dynamic date report. Returns list for yesterday. This report includes many attributes off grid to allow for customized subscriptions. RK 21
Placed Holds List - MONTHLY	MTSCAdmin	11/26/21 9:07:54 AM	Dynamic date report. For example, if this report is run in November, it will return a list for October. This report includes many attributes off grid to allow for customized subscriptions. RK 21
Placed Holds Statistics - MONTHLY	MTSCAdmin	11/26/21 8:53:58 AM	Dynamic date report. For example, if this report is run in November, it will return a list for October. This report includes many attributes off grid to allow for customized subscriptions. RK 21
Suspended Holds	MTSCAdmin		

# Relevant knowledge base articles

- [Core Reports in BCA](#)

# Common Holds Issues and How to Fix Them



# Partners Unfilled Holds > 3 Months

Hold Created Date	Catalog Title	Catalog Author	Item Barcode	Item Collection	Item Status	Item Library Code
2/1/2024	The unselected journals of Emma M. Lion.	Brower, Beth,	2850250-4001	CATALOGING	CATALOGING	DARBY
2/11/2024	The Complete Vegetarian Cookbook	America's Test Kitchen (COR)	2759015-1001	ON-ORDER	ON-ORDER	GFPL
2/20/2024	Shipwrecks : all true and unbelievable! /	Freels, Korynn,	33236006428941	STACKS	STACKS	FCL-BF
2/20/2024	Weather : all true and unbelievable /	Wible-Freels, Korynn,	33236006428842	STACKS	STACKS	FCL-MAIN
2/21/2024	Trout madness, being a dissertation on the symptoms and pathology of this incurable disease by	Traver, Robert,	39869000006224	NON-FICT	INTRANSIT	DARBY

# Handling holds about to expire

1. Check with your patron to see if they still want the item.
2. If they do:
  - a) Modify the hold to extend the expiration date (screenshot).
    - i. Don't extend the expiration over a year into the future.
  - b) Order another copy.
  - c) ILL the item.

Modify User Holds : TRAINING, FRANK EXAMPLE

Modify Holds Fields

Allow Recall  No Recall  Recall now (RUSH)

Pickup location:  Expires:

Date suspended:  Date unsuspended:

Mail Item to User:  Yes  No Mail service:

Comment:  Append  Replace  Remove

OK Cancel

# Problem vs popular

Item Search and Display x

The entire sky : a novel / Wilkins, Joe, author.

Control Bibliographic MARC Holdings **Call Number/Item** Bound-with Orders Serials Ctrl Selections

The entire sky : a novel - Wilkins, Joe, author.

- Partners Libraries
  - F WILKIN - HFL
    - 37455010465923 - 2 - NEW - INTRANSIT**
    - F WILKIN - HFL
      - 37455010466574 - 1 - NEW - INTRANSIT
    - FIC WILKINS - MSLA-MAIN
      - 39926000416918 - 1 - FLOAT-NB - HOLDS
    - MTR MTAWARD 2024 - MSLA-MAIN
      - 2887707-16001 - 1 - NONCIRC - ON-ORDER
    - AF WILKINS - GPL
      - 33384000844992 - 1 - NEW - INTRANSIT
    - F WIL - MEAGHER
      - 39511000447848 - 1 - NEW - CHECKEDOUT - Can't
    - F WIL - SWCL
      - 39916000406589 - 1 - BOOK - HOLDS
    - FIC WILKINS - LIVINGSTON
      - 39926000418815 - 2 - FLOAT-NB - LOST-ASSUM - C
    - FIC WILKINS - GFPL

**Item Info** Circ Info Bills Checkout **Holds** Charge History Bookings

Number of records: 4

Card #	User...	Level	Status
208...	BR...	TITLE	Unavailable
208...	CH...	TITLE	Unavailable
208...	EBI...	TITLE	Unavailable
208...	WO...	TITLE	Unavailable

**Range:** GROUP  
**Position:** X 1  
**Placed:** 2/25/2025  
**Expires:** 2/25/2026  
**Notified:**  
**Recall:** STANDARD  
**No hold allowed override:** N  
**Pickup library:** GFPL  
**Placed at library:** GFPL  
**Owning library:** X SWCL  
**Comment:**  
**Date suspended:**  
**Date unsuspended:**  
**Inactive reason:**

**Date created:** 11/18/2024  
**Date last charged:** 2/10/2025  
**Date due:** none  
**Last discharged:** 2/18/2025,14:03  
**Date inventoried:** Never  
**Times inventoried:** 0  
**Previous user ID:** 27455000063896  
**Last activity:** 2/24/2025  
**In-house uses:** 0

Display

Library type: Placed at library  
Library: All libraries  
Holds type: Active

# Problem vs popular, cont'd.

The entire sky : a novel / Wilkins, Joe, author.

Control Bibliographic MARC Holdings **Call Number/Item** Bound-with Orders Serials Ctrl Selections

The entire sky : a novel - Wilkins, Joe, author.

- Partners Libraries
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      - 39926000418815 - 2 - FLOAT-NB - LOST-ASSUM - C
    - FIC WILKINS - GFPL

**Date created:** 11/18/2024  
**Date last charged:** 2/10/2025  
**Date due:** none  
**Last discharged:** 2/18/2025,14:03  
**Date inventoried:** Never  
**Times inventoried:** 0  
**Previous user ID:** 27455000063896  
**Last activity:** 2/24/2025  
**In-house uses:** 0

Item Info **Circ Info** Bills Checkouts Holds Charge History Bookings

<b>Controls:</b>	none
<b>Checkouts:</b>	none
<b>Bookings:</b>	none
<b>Holds:</b>	4

Item Statistics

<b>Ongoing checkouts:</b>	3
<b>Ongoing renewals:</b>	1
<b>Checkouts to date:</b>	3
<b>Renewals to date:</b>	1
<b>Date last cleared:</b>	NEVER

Transit

<b>To:</b>	MSLA-MAIN
<b>From:</b>	HFL
<b>Reason:</b>	For a hold
<b>Date sent:</b>	2/24/2025,10:42

# Enterprise bug



Image by [Andre Mouton](#) from [Pixabay](#).

# Relevant knowledge base articles

- [Problem Holds: Common Issues and Solutions](#)

Thank You!  
Please Take Our Survey



# Survey Details



- Date of Training:  
2/27/2025
- Title of Training:  
MSC Quarterly Webinar:  
Managing Holds
- Link:  
<https://forms.office.com/g/ffUuzbA8gn>