# EVERGREEN HOLDS PROCESS

# Potentials List

- When a hold is placed in Evergreen, the system creates a list of potential items that could fill the hold.
- Evergreen checks those items for anything that should prevent them from filling a hold such as
    - Holdable flag in the item record
    - Hold policy restrictions
    - Patron restrictions

# Eligible Items

- From the potentials list, Evergreen creates a list of items that are eligible to fill the hold
- Two processes are started simultaneously to fill the hold:
  - **Targeting**, which looks for an available item to fill the hold
  - **Opportunistic Capture**, which looks at items being checked in to fill the hold

# Targeting

- Evergreen eligible items that are in the statuses Available or Reshelving
- A single item is targeted to fill the hold and put on the owning library's Holds Pull List
- If the targeted item fills the hold before it is filled by opportunistic capture, the hold will be filled by the targeted item.
- Holds are retargeted every 24 hours after the hold was placed based on the hold request creation timestamp.

# Newly Added Items

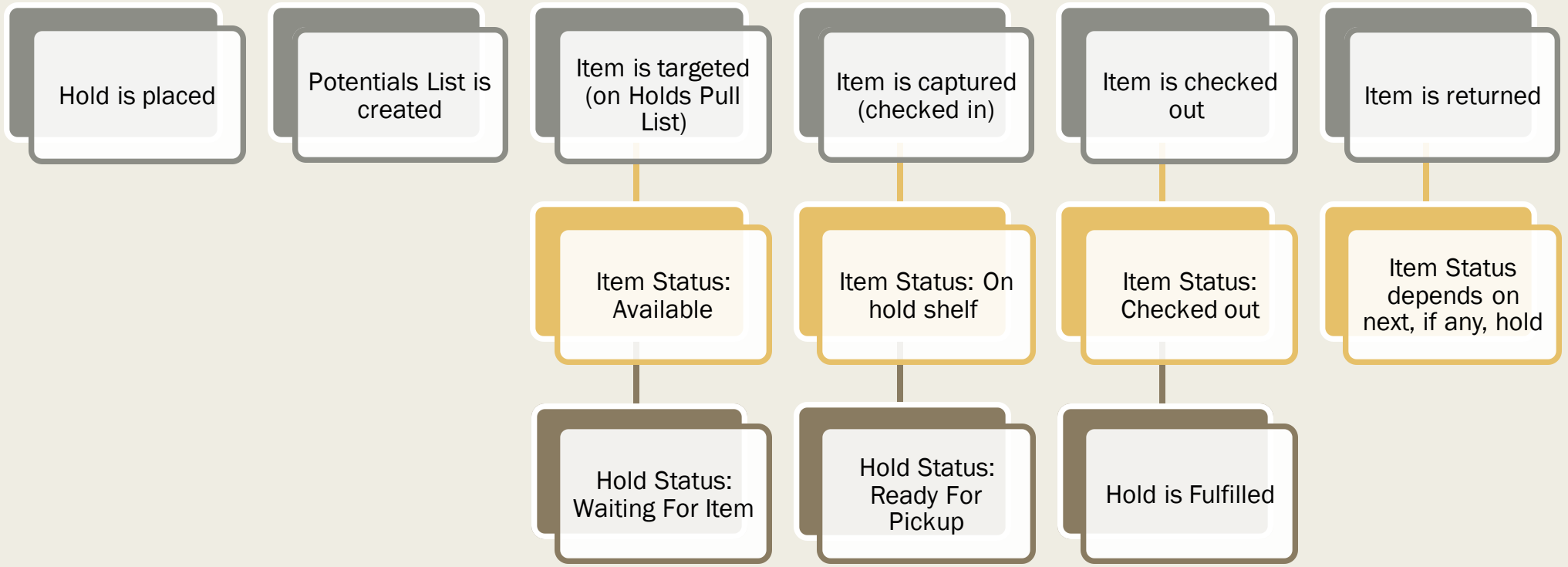
Holds are retargeted every 24 hours after a hold was placed based on the hold request creation *timestamp.*

- It is the *time* of day the hold was placed which influences the time of day the hold request is refreshed to identify available items.
- An item that is added and made available in the afternoon may fill a hold that was placed in the afternoon (based on *time*) instead of a hold that was placed in the morning (based on *date*).

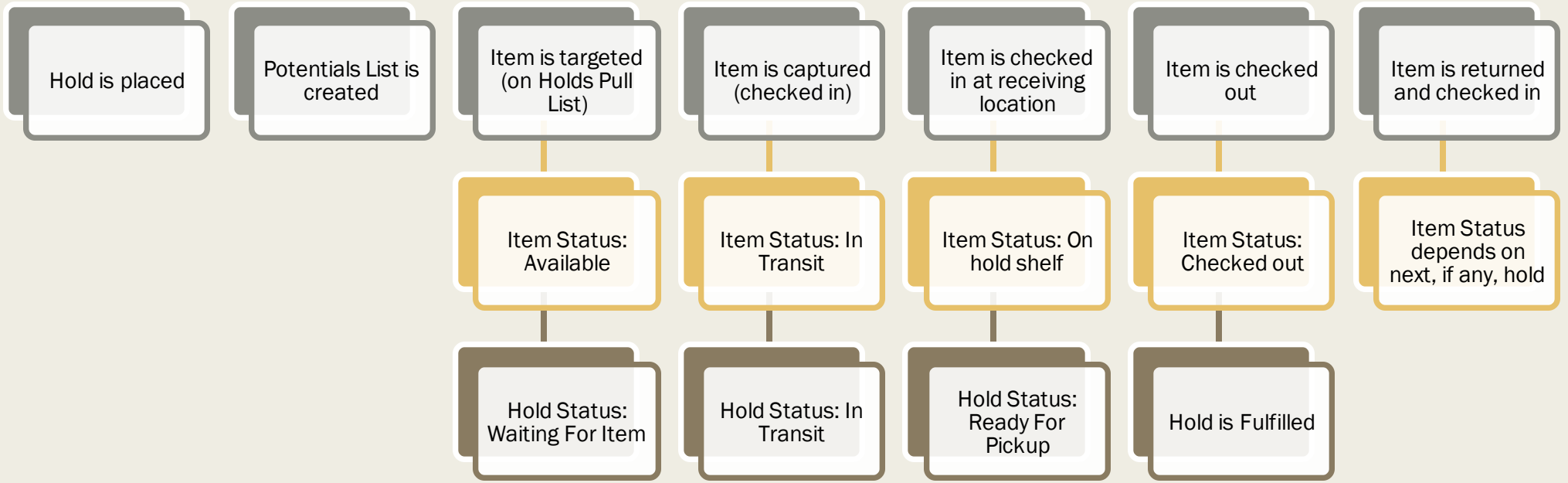
# Opportunistic Capture

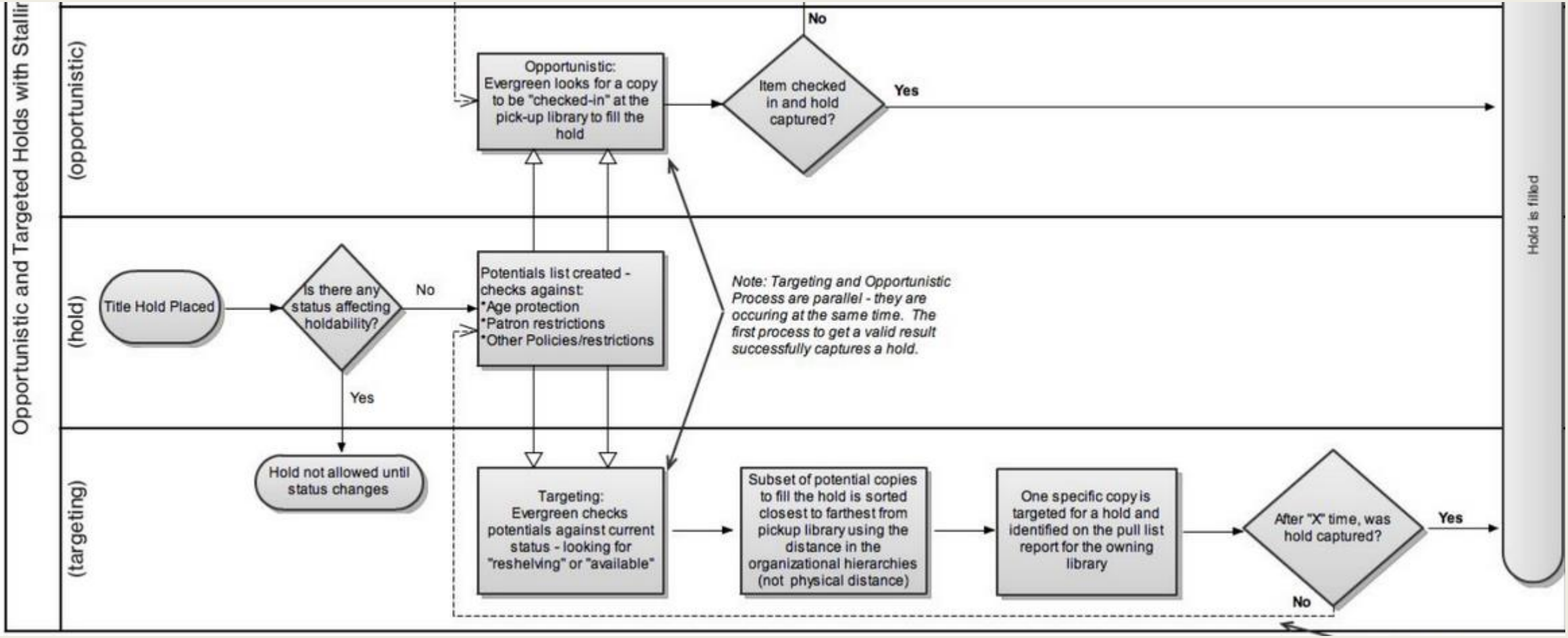
- Evergreen looks for an item to be checked in at the hold Pickup Library
- When an eligible item is checked in at the Pickup Library, that item will fill the hold, as long as the targeted item has not already been captured.

# Local Hold Process:
# Hold Pickup Location and Item Location Match (the item is at the pickup library)



# Remote Hold Process:
# Hold Pickup Location and Item Location Don't Match (the item is filling a hold at another library)




Opportunistic and Targeted Holds with Stallir
(opportunistic)
(hold)
(targeting)
Opportunistic: Evergreen looks for a copy to be "checked-in" at the pick-up library to fill the hold
Item checked in and hold captured?
No
Yes
Hold is filled
Title Hold Placed
Is there any status affecting holdability?
No
Yes
Potentials list created - checks against:
*Age protection
*Patron restrictions
*Other Policies/restrictions
Note: Targeting and Opportunistic Process are parallel - they are occuring at the same time. The first process to get a valid result successfully captures a hold.
Hold not allowed until status changes
Targeting: Evergreen checks potentials against current status - looking for "reshelving" or "available"
Subset of potential copies to fill the hold is sorted closest to farthest from pickup library using the distance in the organizational hierarchies (not physical distance)
One specific copy is targeted for a hold and identified on the pull list report for the owning library
After "X" time, was hold captured?
Yes
No

# Hold Reports

- Current Unfilled Holds By Patron Library
  see what's waiting for pickup and follow up on unfilled holds
- List Patrons By Pickup Library and Date
  which libraries' patrons are picking up at your library?
- List Patrons With Pending Holds
  Where are your patrons picking up holds?
- Purchase Alerts by Pickup Library
  display title hold/copy ratio by library to aid purchasing
- Purchase Alerts Summary
  display systemwide title hold/copy ratio to aid purchasing

For more information, Evergreen Hold Essentials on the IT Wiki

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