Holds for review report

You can view a report of unfulfilled hold requests that need to be reviewed. The report contains live, current data so that you can better monitor your fulfillment services and, if needed, edit or delete holds immediately.

Holds will obtain In Review status and be added to the report according to your library's policy. See Holds To Review Policy for configuration details.

Holds will no longer be in review if they are deleted, expire, or if a fulfilling item is in transit to the pickup location or on the hold shelf.

Note: If your library is a member of a WorldShare Management Services (WMS) group and participates in group circulation, the Holds for Review report and its associated policies will apply to requests for your library's patrons.

View the report

To view the Holds for Review report:

1. Navigate to the Circulation tab.
2. Click Reports.
3. Click Holds for Review, listed above the Pull List.

Filters

Holds for review has two filters:

• Patron branch
  ◦ By default, the Patron branch is set to the branch currently selected in WorldShare.

• Hold type
  ◦ By default, this is set to All hold types.
  ◦ Options include:
    • Item level: Patron requested a specific, barcoded item.
    • Title level: Patron requested any copy of a title.
    • Special requests: Patron placed a special request or an item-specific request for an unbarcoded item via WorldCat Discovery. See Available hold types for more information.
• **External Requests**
  ◦ By default, this is set to **All**.
  ◦ Options include:
    ▪ **Supplier (external)**: An external system has requested your library supply an item. WorldShare Acquisitions, WorldCat Navigator, and ZFL-Server may create supplier-side external holds.
    ▪ **Requester (external)**: An external system has requested an item on your patron's behalf. WorldShare Interlibrary Loan, Tipasa, WorldCat Navigator, and ZFL-Server may create requester-side external holds.

Note: The column display is not saved from session to session. Filters will return to the default setting the next time you sign in.

**Take action on holds within the report**

You can take an action on holds in the report, such as view more details, update the hold, or delete the hold. To take an action:

1. Open the Actions menu. ⋮
2. Click **View/Edit** to open the **Edit Existing Hold Request** dialog box.
3. Click **Delete** to delete patron's hold and send an expiry notice to the patron (if configured).

Note: The **STUDENT_WORKER_RESTRICTED** role does not have permission to edit or delete holds. Instead, the only option the student worker will see on the Actions menu is View. When clicked, that action opens the read-only View Existing Hold Request dialog box.

**Review status visible from hold queues**

If a hold qualifies for review, you will see **In Review** in the Status column of both the patron and title hold queues.