

Request Item

Evergreen Release 2.9

The Request Item feature allows library staff to recall specific items from circulation by placing a recall or force hold. Hold policies are bypassed when Request Item is used, so factors that normally prevent an item from being put on hold, such as copy status, shelving location, and holdable status flags, are overridden.

Staff members will need the following permissions applied to their account to access Request Item:

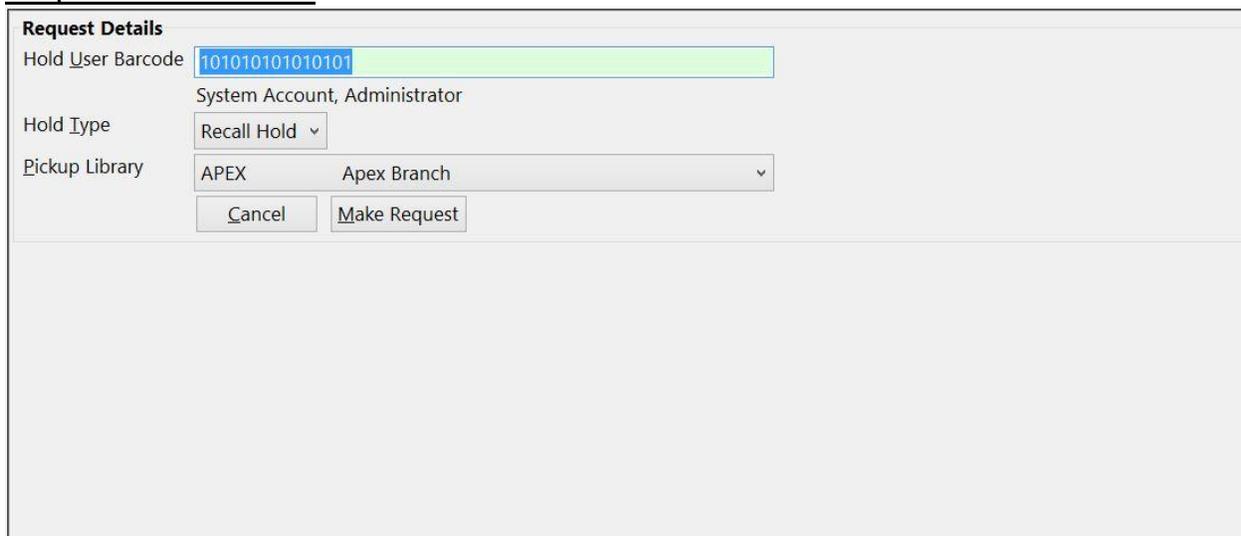
- COPY_HOLDS_FORCE
- COPY_HOLDS_RECALL

The Request Item action can be accessed through three different screens:

- Holdings Maintenance (Actions for Selected Rows > Request Item)
- Item Status (Actions for Selected Items > Request Item)
- Copy Buckets (Batch actions : Request Item)

The Request Item screen (below) will display in the same way no matter how it is accessed.

Request Item screen

A screenshot of the 'Request Item' screen in the Equinox software. The screen is titled 'Request Details' and contains several input fields and buttons. The 'Hold User Barcode' field is highlighted in green and contains the value '101010101010101'. Below it, the text 'System Account, Administrator' is displayed. The 'Hold Type' dropdown menu is set to 'Recall Hold'. The 'Pickup Library' dropdown menu is set to 'APEX' and 'Apex Branch'. At the bottom of the form, there are two buttons: 'Cancel' and 'Make Request'.

Requesting an Item

The Hold User Barcode is automatically filled in based on the staff account you are logged in.

To complete your hold, select the following information:

1. Choose one of three Hold Type. Staff will not receive a hold-is-ready-for-pickup notification (via phone, e-mail, or text) when the hold is placed through the Request Item feature.
 - Copy Hold - will place a regular, copy-level hold on the item for the staff member.
 - Recall Hold - will push hold to the top of the queue and route the item to Cataloging when it is captured. (An Alert message pop-up will appear when the item is checked in: "This item needs to be routed to CATALOGING.")
 - Force hold - will push hold to top of the queue, but route the item to the staff member. (No alert message upon check-in, but a normal hold slip will appear that can be printed off.)
2. Select which Pickup Library the item needs to go.
3. Click on the Make Request button to complete your hold process and Evergreen will place a hold on your behalf. The message "[X] holds created" -- with [X] being the number of items placed on hold -- will appear below the Request Details section once the Request Item process is complete.