Hold It! Improving Access to Collections with an Online Holds Service.

Abstract

As more library collections are being moved to remote storage facilities, access services departments are creating services to support better access to these collections. In August of 2013, the University of North Texas Libraries created an online holds service, accessible through its online catalog. This service enables students, faculty, staff and community members to request materials directly from the catalog and select the pickup location of their choosing. In addition, a self-service hold shelf was created in the main library to enable patrons to pick up their materials 24/7. This article describes the planning processes involved in creating the service.

Background

An issue libraries are facing on a continual basis is the need for additional space in their buildings. As student populations grow, the need for individual and group study spaces has increased as well. This need has caused many libraries to begin acquiring remote storage buildings to store library materials offsite, creating more available learning spaces in their buildings. The University of North Texas Libraries has a library annex which serves as its remote storage facility. Items that have not been checked out in over ten years have been moved to this facility from its main library. This facility is not open to patrons, however, items may be requested for delivery to a library branch. Before August of 2013, patrons would request items from the remote storage facility by filling out an online form called the Library Materials Delivery Request Form. The items would be retrieved from the remote storage facility and delivered to the designated library within 24 hours. Patrons were limited to requesting five items at a time and had to fill out an individual form for each item. The fields on the form included the patron name, email address, title of the item and call number of the item. Patrons would be sent an email to notify them when their items were available for pickup. Items would be held for ten days.

Problems with the Library Materials Delivery Request Form were encountered by both patrons and staff. For patrons it was time consuming to fill out a form for each individual item. They were also limited to requesting five items at a time. For staff there was a lot of time spent on entering hold information into our library system, Millennium, since the Library Materials Delivery Request Form was a basic web form and was not linked to the system.

To rectify the problems encountered with the Library Materials Delivery Request Form and to improve the materials requesting process, the Head of Access Services Department worked closely with the UNT Libraries Circulation Work Group and the Resource Discovery System Librarian to create an online holds service that would enable patrons to request materials directly from the online catalog, eliminating the need for the Library Materials Delivery Request Form and streamlining the request process.

In January of 2013 the UNT Libraries migrated from Millennium to Sierra as its library system. We used the Sierra manual as a guiding work tool for the planning process.

Planning

The processes required to create the new, online holds service involved many steps so much planning was needed. The Head of Access Services made site visits to other libraries using an online hold service to discuss lessons learned through the implementation process. The common threads throughout the feedback from these visits was to plan and test our workflow processes thoroughly. The Circulation Work Group organized a five stage implementation plan: design, logistics, test, train and market. Overall, the planning process spanned six months.
**Designing**

The design plan for the service was to create an interface within the online catalog where a patron would be able to click on a link in the record of the item they wanted, request that item, select a pick up location and place the hold on that item. These holds would appear in Sierra automatically. Staff would be able to run a paging list of those requested items, pull them from the stacks and check them in to activate the hold pick up notice which would be emailed to the patron.

A “Request this item for pick up” link was created and included in each eligible item’s catalog record. The link was easily identified by a delivery truck icon within the record. Patrons would be able to click on the link and begin the requesting process. A designated staff person in each library would run the paging list of requested items twice a day. As items were scanned, staff would be notified where the item was to be picked up at. Hold pick up notices would be processed twice a day as well.

**Logistics**

The logistics plan for the service involved identifying how patrons would log in to register their requests, which collections would be eligible, how many items could be requested, what pick up locations would be available, what the paging lists would look like and how long would items be held for. A courier system also needed to be in place so requested materials could be delivered to their pick up locations in a timely manner.

The Circulation Work Group decided that only regular circulating items in our libraries, including remote storage, would be eligible for requesting. Library use only items, reserve items and special collection items would not be eligible for requesting. A limit of 10 items was decided upon as a reasonable hold limit amount, which would not hinder patrons’ research needs and would not impact greatly hold shelf space limitations. All of our library branches, except remote storage, would be eligible item pick up locations. After clicking on the “Request this item for pick up” link in the catalog item record, patrons would be taken to a login screen where they would enter their university id and password. They would then be able to select which library they would like to pick up the item at. A courier would visit each of the libraries once a day, five days a week, to make retrievals and deliveries.

**Testing**

Once all the logistics were set, we decided to do a test run of the service. We conducted the test run in July of 2013. Conducting the test during the summer seemed the best time to do it so that issues could be worked out before the busy, fall semester began. We tested the request link to make sure patrons could log in to the service and requested several items for different pick up locations to see that the system worked as planned. We tested the paging lists and hold pick up notices to make sure they contained the correct information and were received by patrons.

**Training**

Designated staff from the circulation areas in each of the libraries were trained to run the paging list pull the items from the stacks, process the items and run the hold pick up notices. A manual was created that included screen shots of the workflow processes so steps could be followed uniformly. Each week the Circulation Work Group corresponded to address any issues that came up.

After all minor issues were resolved, which were all we saw with the testing and training, we decided to go with an official launch of the online holds service in August 2013.
Marketing

Since the online holds service targeted making requesting items much simpler, we wanted to embed that idea into our marketing campaign. We created an online ad for our homepage to advertise the service and we worked with our library liaisons to get the word out to students, faculty and staff.

Self-Service Hold Shelf

At the same time we activated the online holds service, the Access Services Department also created a self-service hold shelf in its main library. We wanted to make sure patrons were able to request the items they needed when it was convenient for them and not be limited by the operational hours of a service desk. The hold shelf is located on the first floor of the main library and is accessible 24 hours a day, 7 days a week. Items may be checked out at the self-checkout machine or at the 24 center desk when the main service desk is closed.

Results

Since implementing the online holds service in August of 2013 we have processed over 40,000 hold requests. We have done some minor tweaking to the service such as offering faculty a delivery pick up location of “deliver to office” where we will send requested items through the campus mail to department offices, and increasing the hold limit to 25 items.

The percentage of items not picked up on our self-service hold shelf has been about 8%.

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