Manage in-house use of items
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Learn how to manage in-house use of items reserved for patron use in a reading room or other location on library premises using the Pickup Location report. Optionally provide an alternative to traditional loans or soft check ins when your library wants to monitor usage of your library's special collections, microfilms, or any other materials that should not leave the library because of their value, age, physical condition, or uniqueness.

When a patron arrives at the pickup location, use the Pickup Location report to locate all of the items that are ready for use. When the patron begins consulting the item, use the Mark In Use option in the Actions menu to update the hold to the In use status.

Configuration

Set the branch Fulfillment Method

Use the Fulfillment Method option for your branch locations to indicate if held items can be collected for checkout or must be used in house. To update the Fulfillment Method of your active pickup locations:

1. Navigate to OCLC Service Configuration > WMS Circulation > Admin/General > Branch Locations and select the desired branch.
2. Under Request Fulfillment, change the Fulfillment Method to In-House use only.

See Branch Locations for more information.

Set the In-House Use Period

Specify an amount of time for a patron to consult an item reserved for in-house use. For example, you may give patrons three days to retrieve a held item and then two weeks of reserved consultation time.

The In-House Use Period is an optional configuration to adjust the hold's expiration date automatically when a reserved item is consulted in house for the first time. This hold reservation period will be calculated from the moment the request moves to In use status.

Note: The existing Hold Shelf Period configuration in Hold Fulfillment Policy will continue to set the initial hold-until date and time when a requested item is checked in at the pickup branch to fulfill the request. The item must be used in-house at least once or checked out before this expiry date. Otherwise, the hold will expire, and the item will appear on the Clear Hold Shelf report.

To set the In-House Use Period:
1. Navigate to OCLC Service Configuration > WMS Circulation > Holds & Schedules > Hold Fulfillment Policies and select the Hold policy to edit.

2. Set the In-House Use Period to the desired time frame.

3. Optional. Select the Exclude closed hours option to calculate the duration using only the time when the pickup location is open. The open hours of the branch are used if that branch's open hours are set to override your institution's hours.
   - If you do not want the hold shelf expiry period to be adjusted at the first in-house use, you may leave the In-House Use Period blank.

See Hold Fulfillment Policy for more information.

Notes:

- You may manually update the hold shelf expiry date and time manually from the Circulation interface, but you will need to acknowledge any date that exceeds library policy. See the Edit or delete hold for more details.
- Circulation groups: The Hold Fulfillment Policy is controlled by the item-owning institution. The hours of the pickup location will be honored when calculating the hold shelf period and in-house use period when the Exclude closed hours options are selected.

Set an item as In use

When a library user arrives at the pickup location, use the Pickup Location report to locate all of the items that are ready for use.

Note: You must have the Circulation Admin, Circulation Desk, Circulation Desk Privacy, Student Worker, or Student Worker Circulation role to update a hold's status from the Pickup Location report. See WorldShare Circulation Account roles.

When the patron begins consulting the item, use the Mark In Use option in the Actions menu to update the hold to the In use status. Any hold in Ready for use status can be updated to be In use to register the use of the material, even if the pickup location usually supports checkout of reserved items. For example, an item’s condition may prevent you from allowing the material to leave the library, or the patron may choose to consult the material without checking it out.

Note: If the Hold Fulfillment Policy includes a bill for picking up a hold, the system will ask you to acknowledge the billed amount before the hold's status can be updated to In use. The system will only charge the patron the first time the hold is moved to In use status.

The patron's hold queue and the item's status will reflect when the reserved item is In use.
• While a hold is In use, it cannot be deleted by library staff or the patron. Nor can the hold’s pickup location be updated. The hold must be put back in Ready for use status before these changes can be made to avoid confusion and to ensure the item's chain of custody is recorded.

• An in-use hold will remain visible to library staff and the patron even if it has exceeded its hold shelf expiry date and time.

• In-house use will be recorded in the item's statistics to help track usage of your special collections. See View statistics and reminders sent for more information.

Take action on items set to In use

To return the hold's status to Ready for use, select Mark Ready for Use from the Actions column when the library user is done with the item for the time being or needs to temporarily step away from the item.

  • Moving a hold back to Ready for use status implies that the patron intends to return to consult the item later. There is no limit to the number of times that a hold can be moved into In use status.

To show that the library user is done with the reserved item, use the Mark Complete action. Holds in Ready for use or In use status can be updated using the Mark Complete action.

  • When a request is completed, the hold will no longer display to library staff or to the patron in My Account. The item will appear on the Clear Hold Shelf report. Unlike deleting a hold, completing a hold will not send a hold expiry notification to the patron.

Library User experience with In-House items

In-house use requires the patron to set aside enough time to consult materials while the library is open. When a patron places a request in WorldCat Discovery or reviews their open request in My Account, the system will remind the patron that in-house use will be required via the hold form, hold confirmation message, and the Status column for their Requests in My Account.
No additional hold pickup notifications will be sent to the patron after the first in-house use of the requested material. A hold shelf expiry notification will only be sent if the hold expires while in Ready for use status and is checked in from the Clear Hold Shelf report or if the hold is deleted by library staff.

- Marking a hold as Complete will not trigger a hold shelf expiry notification.


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