To Hold or Not To Hold

Are there some patrons you don't want placing holds? You can change their permissions.

There are two ways you can prevent holds: by policy, or by security group.

To prevent patrons in a specific policy from placing holds, Open Preferences and go to the Policies area.

On the Patron Policy side, choose the policy from the drop-down menu, and go to the Other tab.

Change the Maximum Hold Requests field to 0, and Save the policy. All patrons on this policy will now be unable to place holds.

Note that you can still place a hold for these patrons in Circulation as long as you have Hold and Override permissions.

To prevent holds on a more individual basis, you can use Security Groups.

In Preferences, under Configuration, go to the Security area, and create a new group.

The easiest way to do this is to select the Patron Security Group, then from the Actions (gear) menu at the bottom, choose Duplicate, and give it a name; for example, Patron No Holds. Ok.

Go to the Researcher tab, and change the Hold Management drop-down menu to No Access.

Save the preference.

To assign a patron this Security Group, from Patron Management, select the record, unlock it, change the Security Group drop-down menu to your new group, then Save the record.

This patron now can not place holds from the Researcher.

Note that *you* can still place a hold for this patron in Circulation as long as you have Hold permissions.

See also Tech V7005 - Filling Holds