

Clearing the Hold Shelf in CARLX

This process should be done daily when your library is open. There will be 3 steps, which are broken down below.

1. Run Expired Holds Report (optional if your library is using pull dates or another means to manage the hold shelf)
2. Pull expired Holds from Hold Shelf
3. Scan pulled holds through Returns/Check In, 1 by 1, to Activate Next Hold

Run Expired Holds Report

- Along the top menu, choose Reports > Circulation > 80 Hold Expired List
- If your library is not highlighted under the Parameter Set, choose it from the dropdown menu
 - To check parameters, click "View/Edit Parameters" to see if your location is the default
- Click "Run"
- When the report is finished running, you will see it appear in the "Transfer from Server" list
- Highlight your report and click "Transfer." This will move it to "Available Copies" on the right
- Highlight the report in "Available Copies" and click "View"
- To print this list, click the print icon in the report that opens

Scan Pulled Holds Through Returns/Check In to Activate Next Hold

- Once the items are pulled, either from the Expired Holds list or by using the Pull Date on the due slips
- Go to Return in CARL•X
- Scan the barcodes
- Click "Activate Next Hold" when a big, red box appears that says "Item Should Be On Holdshelf" to send it into transit or place it on the hold shelf