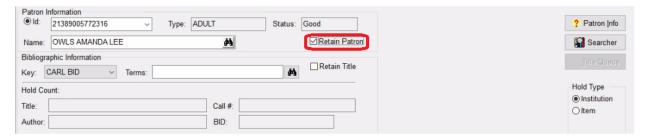
Placing Holds in CARLX

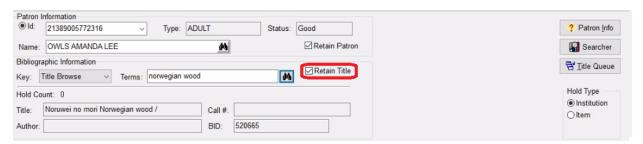
Placing holds is easier to do in CARLX than it is in CARL Connect, especially for placing multiple holds for a patron or multiple holds against a title. The below directions ask for patron information first, but it doesn't matter if you search by title or patron first.

Start in Holds (F7).

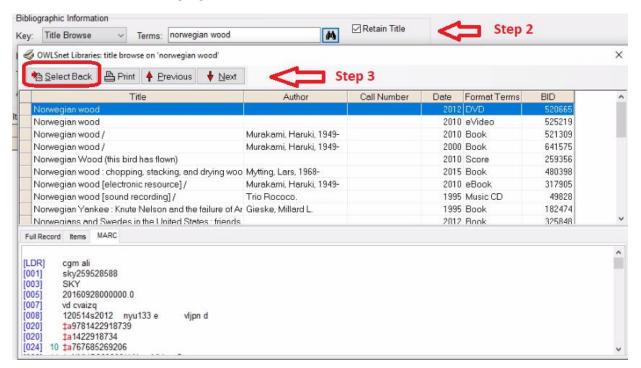
- 1. Scan the patron barcode in the ID box, or search by name in the Name field and click the binoculars.
 - o To place multiple holds for the same patron, check "Retain Patron."



- When the patron's information loads, enter the search terms for the title to place on hold and click the binoculars.
 - Check the "Retain Title" next to the search terms to place multiple holds on the same title.

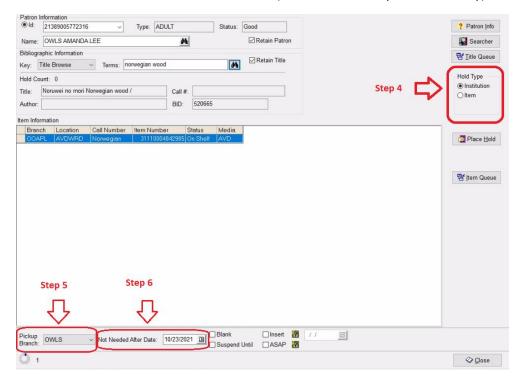


3. In the results list, highlight the correct item and click "Select Back" or double click on the title.

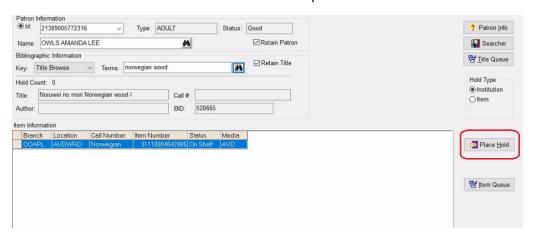


4. Select the Hold Type.

- o "Institution" is the same as bib-level or title-level holds. Any item attached to this record can fill the hold. Most holds will be Institution holds.
- "Item" means only that item will fill the hold. This will typically only be used to recall a specific item due to damage or to change something when it gets back.
- "Issue" will appear as a Hold Type if an item has Chronology and Enumeration. This means there are specific volumes attached to the bib record and Issue Holds let you select which volume is desired. Any volume in the system with the same Chronology and Enumeration in the system will fill the hold.
- 5. Select a Pick-up branch from the drop-down menu.
- 6. Enter the "Not Needed After Date" (it defaults to one year from today).



7. Click the "Place Hold" button to finish the process



To see the holds lists, select the appropriate Queue:

- Title Queue will show all the holds with a hold type of "Institution" against this bib record.
- Item Queue will show all the holds with a hold on this item only.
- Issue Queue will appear if the highlighted item has Chronology and Enumeration and there are holds against that volume or issue.