

Hold and Inter-library Loans in the System

Last updated (6 May 2011) – New updates in **RED text**.

Terms

Local Hold: A local hold is a hold placed on a book/item from **your** library by a patron from **your** library.

System Hold: A system hold is a hold placed on a book/item from any online RSA library (other than your own) that is using the Unicorn system. For a system hold, Unicorn will automatically request the item be put into transit and delivered to your library without need for a phone call, email or fax.

Inter-Library Loan: A request for a book/item from a non-RSA library or an RSA library not using the Unicorn system.

Pick-list or Pull-list: A report run on the System which will be emailed at least daily to on-line and basic on-line libraries. The pull-list is a list of books/items which have been requested from your library via a local or system hold.

No Hold Allowed Override: As of the end of Sep 08, the override codes were changed to remove the staff's ability to place overrides on holds. These were causing all kinds of issues. There are legitimate reasons for a library to need to know the override code. Codes will be given out on an as needed basis in these cases. Please contact Kendal Orrison at RSA for the code.

System Holds – The Process

Step 1: A hold is placed, either by a library staff member or by a patron, on a particular item.

Step 2: The System searches the database and assigns the hold to a particular library if it is a system hold; local holds are pulled from the patron's library or library group. **This initial assignment is used to verify the ability of the patron to place the hold. The actual hold may or may not be filled by the initially assigned library.**

Step 3: **The System runs through the holds rules (hold map, circ map, holds ordered filled listing) to assign the hold to a library's picklist.** Then the library to which the hold has been assigned is notified via the pick-list (Onshelf Hold Items) report **which comes via Gmail.**

Step 4: Library staff member pulls the item from the shelf and scans it into the System via the Trap Holds wizard. **Note: a cheat sheet for this process is available on the RSA website in the cheatsheets section and is inserted at the end of this document.**

Step 5: The System tells staff member where to route the item **and optionally prints a hold wrapper sheet if configured to do so.** Please use an ALS standard ILDS routing slip (RSA Website, Support section, ILDSpaperlabelDec2007.pdf) is placed on the item. **Then place the item into the delivery bag.**

Step 6: Item arrives at destination library. Library staff member scans item into the System via the Receive Transit wizard. The System shows name/phone # of patron requesting item and library staff may contact the patron if they wish. **The patron's online RSA Cat My Account is also updated to show the item as available. Note: a cheat sheet for this process is available on the RSA website in the cheatsheets section and is inserted at the end of this document.**

Step 7: Patron arrives to pick up item. Item is checked out to the patron via the Checkout wizard.

Step 8: Patron returns item. Book is checked-in via the Discharging wizard. The System tells the staff member where to route the item, either back to its owning library or to fulfill another hold. Again use the ALS standard ILDS routing slip to send the item back in delivery.

Placing a Hold in the System through Workflows

Holds are placed through the Place Holds wizard. Here is a picture of the screen you will be using. →

User ID: Either scan the library card of the patron, or look them up using the User Search helper at the upper left of the screen.

Item ID: In most cases you will need to look up the book or item you are requesting in the catalog. To do this, you will be using the Item Search helper. On the Item Search screen, locate the appropriate book, then click on [Place Hold] at the bottom on that screen. This will return you to the primary Place Hold screen (pictured).

Note on Item Search: *Unless you are doing a copy level hold, it will not matter which*

particular copy you choose in the Item Search helper. For a title level hold, the Item ID ONLY serves to tell the system which bib record to use for the hold. If the hold is not allowed and there are multiple bib records for the item you wish, try the other bib records. For any items, different bib records will allow the hold. Since different libraries have differing holds rules, sometimes you will need to try several records to get one that will allow the hold.

The screenshot shows the 'Place Hold' wizard interface. It includes sections for User Information, Identify User, Identify item, and Hold Info. The 'User Information' section displays details for a user named EXPERT, RODNEY. The 'Identify User' section shows the User ID as DOHN88 and contact information. The 'Identify item' section shows the Item ID as A12602156064. The 'Hold Info' section includes fields for Pickup at (AG_ALS-PDC), Expires (12/2/2008), and options for Level/Range (Copy, Title, Library, Group, System) and Recall status (Allow Recall, No Recall, Recall now (RUSH)).

Hold Info - Next you will need to make a number of other decisions relevant to the hold.

Pickup at: This is the library where the patron wants to pick up the held item. You can choose any online RSA library. The normal setting will be the library at which the hold is being placed.

Expires: If the hold is not fulfilled by the date set in this field, it will automatically be deleted from the system. This will normally be set at one year. If a patron is placing the hold for a report or school project, use the due date of the report as the Expires date. Set this date by clicking on the diamond-shaped gadget to the right of the box and selecting the date from the calendar.

Comments: This is an open text box, used for instructions or notes about the hold. Comments will display in the System in the same place as the name and phone # of the patron who placed the hold. This field is optional and may be left blank.

Date Suspended/Unsuspened: If a patron is going to be out of town for a particular period of time, and does not wish to receive their held book/item during that time period, use these fields. Suspended date is the date they leave, and unsuspened date is the date they return. They will not lose their place on the hold list while they are suspended. Again, use the diamond-shaped gadgets to select the appropriate dates from the calendar. These fields may also be left blank unless needed.

Level/Range – You will want to pay close attention to level and range as they will have an important impact on how your holds are fulfilled.

Level: Can either be set to Title or Copy. Title is by far the most common setting and should be used for 99% of your holds. By choosing Title, you are choosing the book you want but not the exact copy. Actually, you are really choosing the bib record you would like to have the hold filled from, not a title spread across several bib records. Usually it's a good idea to place the hold against the bib record with the most owning libraries as it gives you the best chance to get an item. Choosing Copy means that only the exact copy of the book whose bar code is listed in Item ID field will fulfill the hold. Copy is most often used when a book being checked out needs repair when it returns or on serials to indicate a particular issue.

Title Level Holds: This is your day to day hold method. Patrons in RSA Cat can ONLY place title level holds. If you place a title level hold and it says no items are available to fill the hold, it's because NO ITEM MATCHING THE RULES will fill the hold **on that particular bib record. If there are other bib records for the same item available, try those. If none of the bib records allow the hold, your request is breaking the rules setup in the system. You may not override the hold. You can call, email, fax, SILC, etc another library for the items however.**

If you title level hold does not work the most likely reasons are (in order):

1. Your library does not allow onshelf holds and you have a copy not checked out **on the same bib record as the one used to place the hold.**
2. The bib record you choose does not have libraries in your group (either public or school). **In many cases, you cannot place holds across groups. Some libraries loan to both groups. A list of all libraries and which group they loan to is available on the RSA website, look for the Membership link.**
3. The item you choose is either a new item or a DVD/Video. Many libraries do not lone new items or DVDs, Videos, and other audio book type items.
4. The libraries on the bib record you choose are all Union Listing libraries. If the location code is OSTACKS, you can't hold the item. Any item in the catalog in the location OSTACKS belongs to a Union Listing library and isn't holdable.
5. Some other rule, either your library's circ rules or the holds map rules is preventing the hold. **For example, if you library does not allow JUV patrons to circ a DVD, that patron can't hold a DVD. However, if your library rules don't allow JUV DVD circs but the patron requests a DVD-R the hold will be placed unless you have a circ rule preventing that item type.**

As currently configured, title level holds work very well and follow all the rules libraries have provided to us. If you find items you don't think should have been held, chances are there is an error in the rules or with the way the item was cataloged. The other major reason for incorrect

holds is that there isn't a rule in the hold map to block that item type. Please call us to that corrected quickly.

Copy Level Holds: You can use Copy level holds to designate which library and item will fulfill your hold. When doing so, be careful to choose the bar code for the correct library in Item Search, then make the hold a Copy level hold. However, this is not recommended since it can easily delay fulfillment of your hold by weeks or more if that specific copy is checked out by a patron before the hold is fulfilled.

Range: Can be set either to Library, Group or System

Library: Only copies from your own library will be used to fulfill the hold

Group: At this time, only available to libraries with branches. Will fulfill the hold from the main library or from one of the branches.

System: Will search the whole system to fulfill the hold as quickly as possible.

Note: In our system, a library level hold and a group level hold are the same thing for individual libraries. Libraries with branches should normally use a group hold to include all their libraries unless they want the hold filled from a specific library within the group in which case a Library hold range should be used.

The normal setting for range is System. Use Library or group for local holds or if your patron is not in a particular hurry **or you wish to keep the holds for your patrons on your items**. System level holds are split into two groups: Public Libraries and School Libraries. **Please look at the RSA Membership listing to see who is in each (or both) group.**

Recall Status: RSA is not using the recall feature at this time. Will default to No Recall.

Make Hold First in Queue: Library staff may decide, for serious reasons, that the need of this particular patron is more important or more urgent than that of others and make that patron's hold first in line. This decision should be made judiciously. Should more than one library staff member mark this box, the item will fulfill the hold marked "First in Queue" most recently. Please do not use this option without a VERY GOOD reason.

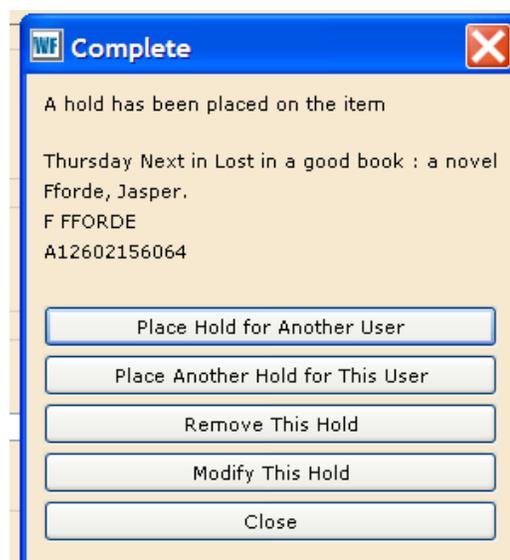
Completing your Hold

To complete the placing of the hold, click on the [Place Hold] button at the bottom of the screen. The following box will appear. →

If you are done placing holds, click [Close].

If you have additional holds to place, use either of the top two buttons.

The [Remove Hold] button is here in case you made a mistake and want to start from scratch. [Modify Hold] only lets you change a few things **like the dates**.



Administering your Hold Shelf

Before long, your hold shelf will begin to accumulate items that were not picked up by patrons prior to your library's deadline, or that expired or were cancelled by the patron. To keep your hold shelf up-to-date, you will refer to the "clean on-shelf holds" report.

The clean on-shelf holds report will be run daily by RSA staff and emailed to your library's Gmail email account. It will list all items that are sitting on your hold shelf whose holds are no longer active. You will take the following actions:

1. Remove the items from the shelf
2. Select the Check Item Status wizard (F2) in Workflows.
3. Scan each item in the Check Item wizard. For each item, it will either
 - a. Instruct you to return the item to the shelf
 - b. Instruct you to put the item in transit to another library, or
 - c. Instruct you to put the item back on the shelf tell you the name and phone # of the next person in the Hold queue
4. If you have the printer configured to do so, Workflows will print a Hold slip or Transit slip as appropriate. Again, if the item transits to another library, use the ILDS label to show that for the delivery people.
5. Do what Workflows tells you for each item

Miscellaneous Holds Notes

Each library's patrons should always have "first dibs" on books from their own library, regardless of how many holds have been placed on the item by patrons from other libraries. Exception: first dibs also extends to patrons from other libraries who have chosen to pick up the item at your library. The rule is "**patrons picking the item up at my library have first dibs.**"

A library may designate one or more Item types which are not available to fulfill system holds. These may be Reference books, new items, etc. Items to be put on display, or needed for a particular project, may also be set to these non-holdable item types temporarily using the Global Modification wizard in the Cataloging module. For example: library A doesn't allow holds on item type BOOK-NEW. If that library wanted to temporarily protect other books from holds, they could change the item type to BOOK-NEW. There are also a very few location codes that do not allow holds: reference, mending, binding, etc. **Location code blocks are system wide, not library by library and are only used in special cases.**

By default, libraries are not set to allow holds for on-shelf items. This functionality can be turned on for any library that requests on-shelf holds. If your library owns multiple copies of an item, and one copy is missing (but not checked out) the system will consider it on-shelf and not allow a title hold for that title. To avoid this, use the Mark Item Missing wizard to mark the misplaced item "missing." Then a title level hold may be placed.

Sending and Receiving Holds Cheat Sheet

Hold Sent Intransit to another RSA Library

This includes items from the picklist or intransits that occur when discharging an item

1. Daily, go to your gmail account to get your picklist.
2. Gather available items from the picklist to send to another library.
3. Go to WorkFlows.
4. Go to the Circulation Module.
5. Open the Holds tool bar on the left of the screen.
6. Open the Trap Holds wizard
7. Scan in the item id numbers for the items being sent
8. Attach delivery label and place in delivery bag.

Items received at your library

This includes intransits received for your patrons or returning items owned by your library that were sent to fill holds at other libraries

1. Go to WorkFlows
2. Go to the Circulation Module.
3. Open the Common Tasks tool bar on the left of the screen.
4. Open the Discharge wizard.
5. Scan in the item id for the items received via delivery.
6. Notify patrons with items on hold; or shelve your returning items.
7. When patrons arrive at library to get holds:
 - a. Go to CheckOut
 - b. Scan patron id number
 - c. Scan item id number attached to the item.