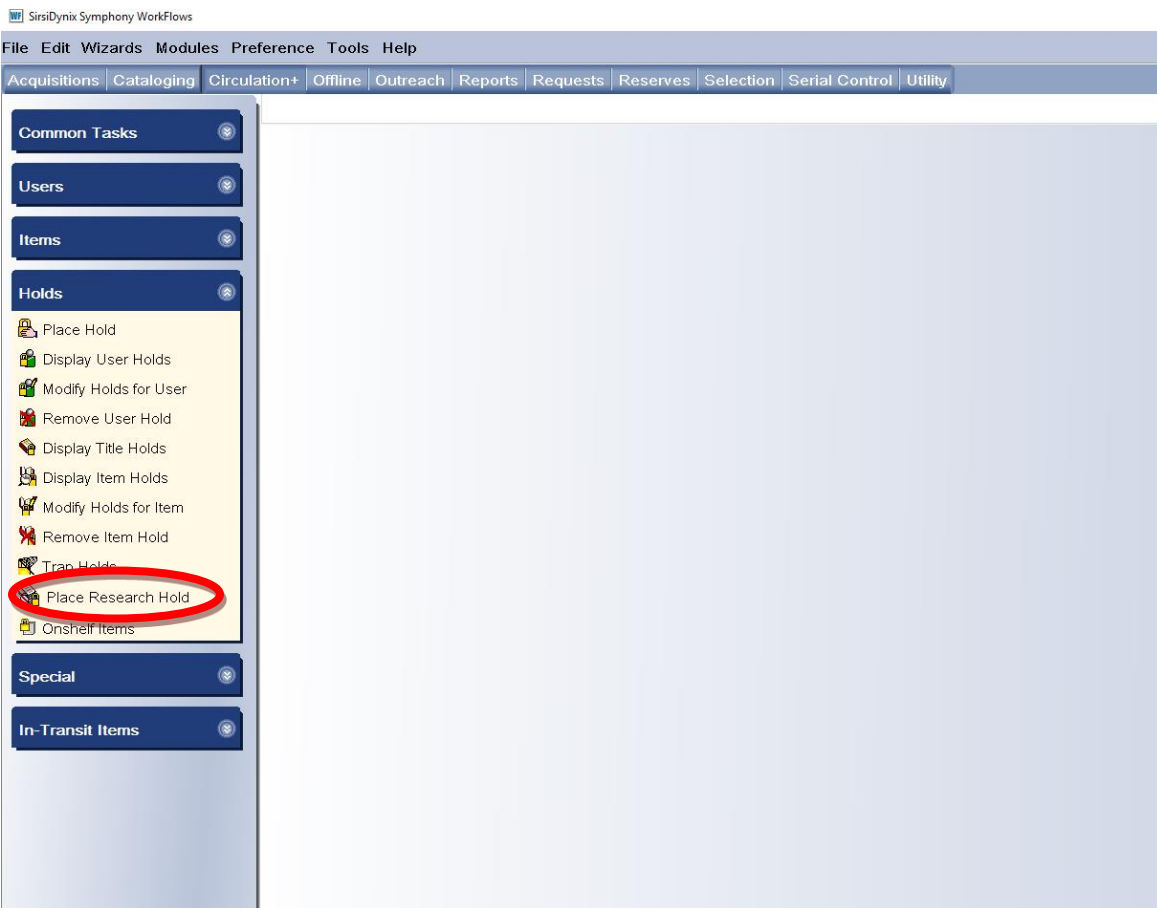


Placing Book Club/Classroom/Research Holds

Revision Date: July 2017

Placing Book Club or Classroom Holds

Book club or classroom holds are used when a patron needs multiple copies of the same title.



1. Log into WorkFlows with the CIRC login.
2. In the Circulation module, open the "Place Research Hold" wizard on the Holds group.

phony WorkFlows: Place Research Hold

zards | Helpers | Modules | Preference | Tools | Help

Cataloging | Circulation+ | Offline | Outreach | Reports | Requests | Reserves | Selection | Serial Control | Utility

Display User * Place Research Hold *

Place Research Hold

User Information

Name: Status: Library:
Profile name: Amount owed: Available holds:
User categories: Overdues:
Group ID:

Item information

Identify User

User ID: D150098765

Identify item

Item ID:

Blanket Hold Info:

Blanket ID: Copies needed: Expires:
Level: TITLE Range: SYSTEM Recall status: NO

Hold Info

Pickup at: AG_ALS-PDC Comments:

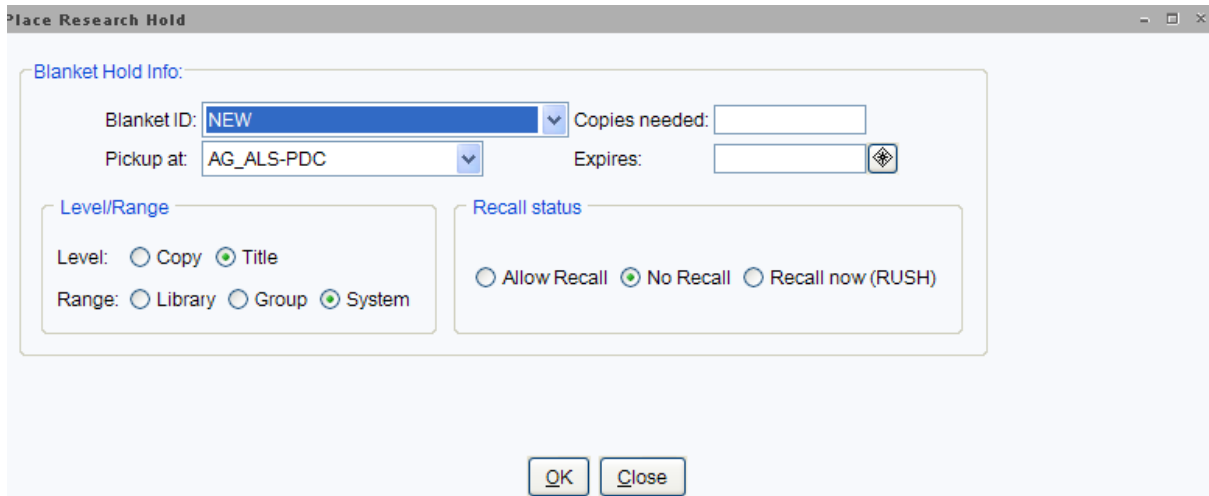
List of Holds

Place Hold	Title	Item ID	Comments
------------	-------	---------	----------

Get User Information Add to List Place Blanket Hold Place Hold for Another User (b) Clear (g) Close

3. Enter the user ID in the "User ID" box under Item Information.
4. Click the "Get User Information" button on the bottom of the screen.

5. A “Place Research Hold” box will pop up.



6. Use the following information to fill in the boxes on the “Place Research Hold” pop up box.

Blanket Holds Info:

Blanket ID: The Blanket ID box should contain the word NEW.

Copies needed: Enter the number of copies needed

Pickup at: Select your library from the drop down list.

Expires: An expiration date is required. After this date your patron can no longer use the items. Use the calendar gadget  at the end of the box to select a date

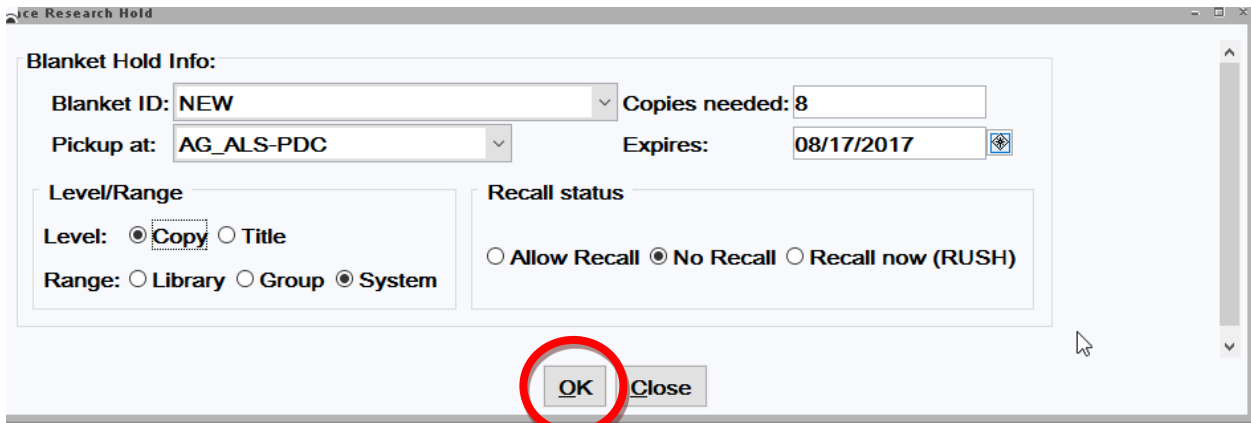
Level/Range

Level: Select the radio button in front of Copy. (This is very important for receiving multiple copies)

Range: Select the radio button in front of System.

Recall Status:

Select the radio button in front of No Recall.



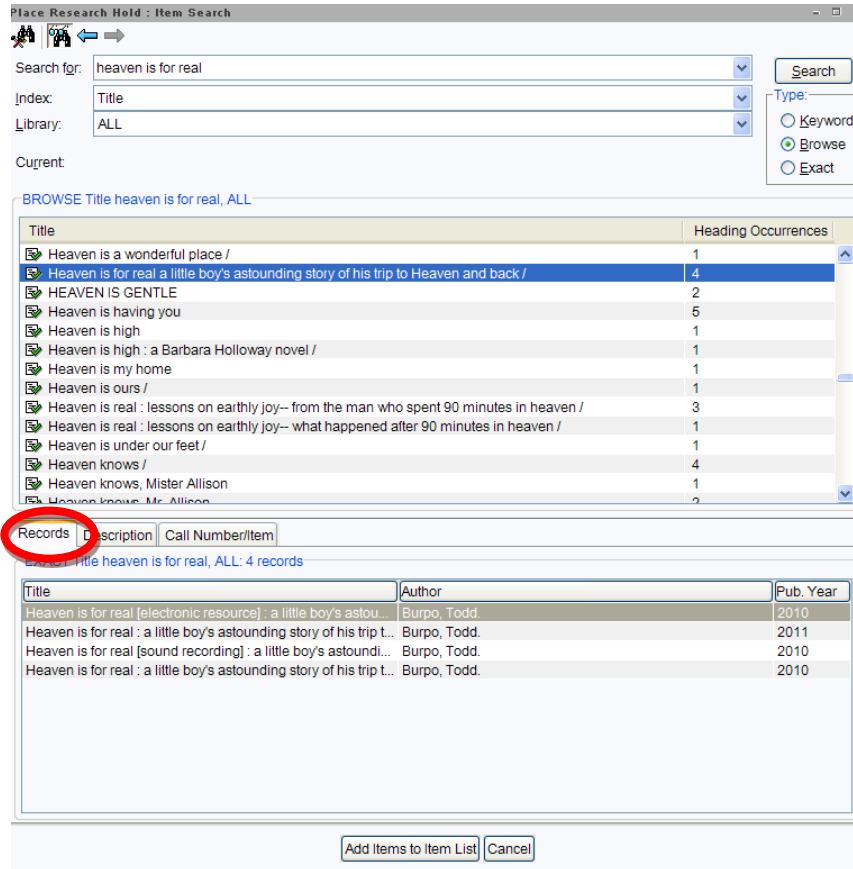
7. Click the “OK” button on the bottom of the “Place Research Hold” pop up box.

You will now begin searching for copies of the title in WorkFlows.

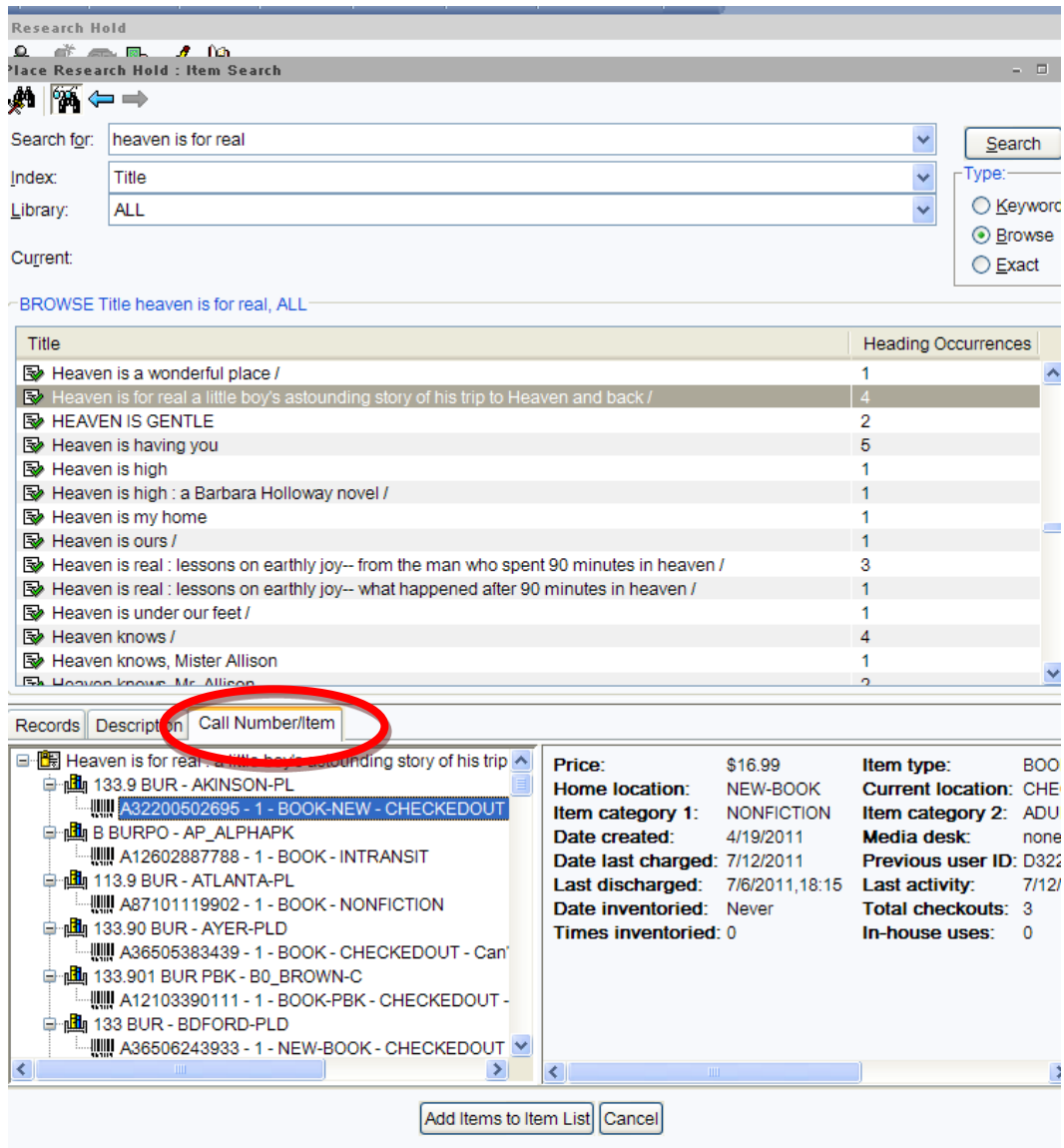
The screenshot shows a web-based library system interface. At the top, there is a navigation bar with tabs for 'Cataloging', 'Circulation+', 'Offline', 'Outreach', 'Reports', 'Requests', 'Reserves', 'Selection', 'Serial Control', and 'Utility'. Below this is a sidebar with a 'Tasks' menu and a list of hold types: 'old', 'User Holds', 'Holds for User', 'User Hold', 'Title Holds', 'Item Holds', 'Holds for Item', 'Item Hold', 'olds', 'Research Hold', and 'Items'. The main content area is titled 'Place Research Hold' and contains several sections: 'User Information' with fields for Name (STARFISH, PATRICK), Profile name (LIBRARYUSE...), User categories (Y), Group ID (2014), Status (DELINQUENT), Amount owed (\$9.00), Overdues (0), Privilege expires (NEVER), and Library (AG_ALS-PDC); 'Item information' with an 'Identify User' section containing a User ID field (D150098765) and address details (Street: 4819 SA, City, state: BOTTON, Zip: 98765, Phone: 309-123); an 'Identify item' section with an Item ID field; 'Blanket Hold Info' with fields for Blanket ID (NEW), Copies needed (8), Expires (08/17/2017), Level (COPY), Range (SYSTEM), and Recall status (NO); 'Hold Info' with a Pickup at dropdown (AG_ALS-PDC) and a Comments field; and a 'List of Holds' table with columns for Place Hold, Title, and Item ID.

8. Click the "Item Search" helper at the top of the screen.

9. The “Place Research Hold: Item Search” pop up box will appear.



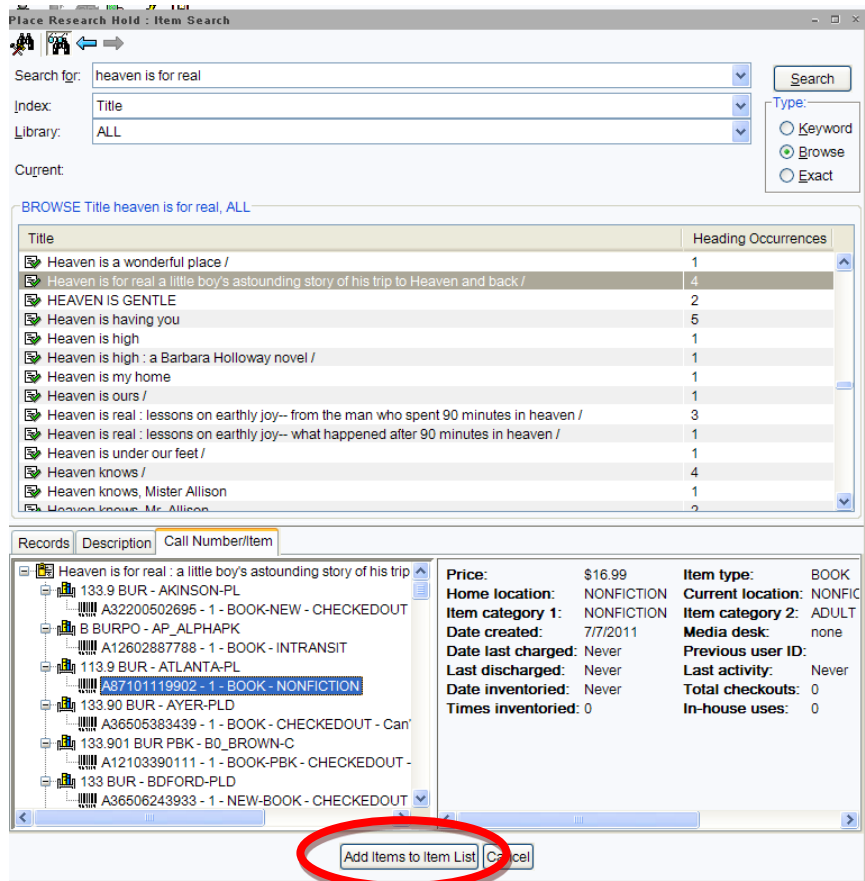
10. Highlight the title on the display window.
11. Select the “Records” tab and highlight the title in the “Records” tab display.



12. Select the “Call Number/Item” tab.
13. Look at the tree on the Call Number/Item tab for:
 - How many libraries own the title
 - How many items have the Item type of NEW-BOOK or BOOK-NEW (these books may not be available for a hold)
 - How many items have the Home location of OSTACK (these items are owned by an offline library and can only be requested via a fax sent to the owning library)

If the title you selected does not contain holdable copies, go back to the “Records” tab and select another title.

Using the “Research Hold” wizard does not limit holds to just one title record, you can select items from multiple title records.



14. Highlight an item from the tree that is either on the shelf or is not a NEW-BOOK, BOOK-NEW or OSTACK.
15. Click the "Add items to the Item List" button on the bottom of the pop up box. You can select an item that is "Checkedout".
16. After you click the "Add Items to Item List" button the "Place Research Hold: Item Search" pop up box will disappear and you will return to the "Place Research Hold" screen.

iDyinx Symphony WorkFlows: Place Research Hold

Edit Wizards Modules Preference Tools Help

Positions Cataloging Circulation+ Offline Outreach Reports Requests Reserves Selection Serial Control Utility

Display User x Place Research Hold x

Place Research Hold

User Information

Name: STARFISH, PATRICK Status: DELINQUENT Library: AG_ALS-PDC
 Profile name: LIBRARYUSE... Amount owed: \$9.00 Available holds: 0 Previous ID: A150098765
 User categories: Y Overdues: 0 Active IDs: A150098765, D150098765
 Group ID: 2014 Privilege expires: NEVER

Item information

Identify User

User ID: Street: 4819 SANDY LANE
 City, state: BOTTOM OF THE OCEAN PA
 Zip: 98765
 Phone: 309-123-4567

Identify item

Item ID:

Blanket Hold Info:

Blanket ID: NEW Copies needed: 8 Expires: 08/17/2017
 Level: COPY Range: SYSTEM Recall status: NO

Hold Info

Pickup at: Comments:

List of Holds

Place Hold	Title	Item ID	Comments

Get User Information Add to List Place Blanket Hold Place Hold for Another User (b) Clear (g) Close

You have not place a hold on the item yet.

17. Click the “Add to List” button on the bottom of the screen. This will add the item to “List of Holds” display box.

iphony WorkFlows: Place Research Hold

zards Helpers Modules Preference Tools Help

Cataloging Circulation+ Offline Outreach Reports Requests Reserves Selection Serial Control Utility

Display User x Place Research Hold x

Alice Research Hold

User Information

Name: **STARFISH, PATRICK** Status: **DELINQUENT** Library: **AG_ALS-PDC**
 Profile name: **LIBRARYUSE...** Amount owed: **\$9.00** Available holds: **0** Previous ID:
 User categories: **Y** Overdues: **0** Active IDs:
 Group ID: **2014** Privilege expires: **NEVER**

Item information

Identify User

User ID: Street: **4819 SANDY LA**
 City, state: **BOTTOM OF TH**
 Zip: **98765**
 Phone: **309-123-4567**

Identify Item

Item ID:

Blanket Hold Info:

Blanket ID: **NEW** Copies needed: **8** Expires: **08/17/2017**
 Level: **COPY** Range: **SYSTEM** Recall status: **NO**

Hold Info

Pickup at: **AG_ALS-PDC** Comments:

List of Holds

Place Hold	Title	Item ID	Com
<input checked="" type="checkbox"/>	Heaven is for real : a little boy's astoundin...	A86486152598	

Get User Information **Add to List** Place Blanket Hold Place Hold for Another User (b) Clear (g) Close

18. Click the Item Search Helper again to choose more items. You will return to the Call Number/Item tab you were using.
19. Highlight another item on the same Call Number/Item tab or select a different item from another bibliographic record with the same title and use the "Add to List" button on the popup box and then the "Add to list" button on the "Place Research Hold" wizard screen.
20. Repeat steps 18 and 19 until you have selected more items than the number of copies you entered in the "Copies needed" box on the "Place Research Hold" pop up box.

Symphony WorkFlows: Place Research Hold

Wizards | Helpers | Modules | Preference | Tools | Help

ns | Cataloging | Circulation+ | Offline | Outreach | Reports | Requests | Reserves | Selection | Serial Control | Utility

Display User x Place Research Hold x

Place Research Hold

User Information

Name: STARFISH, PATRICK Status: DELINQUENT Library: AG_ALS-PDC
 Profile name: LIBRARYUSE... Amount owed: \$9.00 Available holds: 0 Previous ID: A150098765
 User categories: Y Overdues: 0 Active IDs: A150098765,D150098765
 Group ID: 2014 Privilege expires: NEVER

Item information

Identify User

User ID: D150098765 Street: 4819 SANDY LANE
 City, state: BOTTOM OF THE OCEAN PA
 Zip: 98765
 Phone: 309-123-4567

Identify item

Item ID:

Blanket Hold Info:

Blanket ID: NEW Copies needed: 8 Expires: 08/17/2017
 Level: COPY Range: SYSTEM Recall status: NO

Hold Info

Pickup at: AG_ALS-PDC Comments:

List of Holds

Place Hold	Title	Item ID	Comments
<input checked="" type="checkbox"/>	Heaven is for real : a little boy's astoundi...	A86486152598	
<input checked="" type="checkbox"/>	Heaven is for real : a little boy's astoundi...	A36502847010	
<input checked="" type="checkbox"/>	Heaven is for real : a little boy's astoundi...	A33601873108	
<input checked="" type="checkbox"/>	Heaven is for real : a little boy's astoundi...	A35580265682	
<input checked="" type="checkbox"/>	Heaven is for real : a little boy's astoundi...	A74000435711	
<input checked="" type="checkbox"/>	Heaven is for real : a little boy's astoundi...	A93000178529	
<input checked="" type="checkbox"/>	Heaven is for real : a little boy's astoundi...	A32200502695	

Get User Information Add to List **Place Blanket Hold** Place Hold for Another User (b) Clear (g) Close

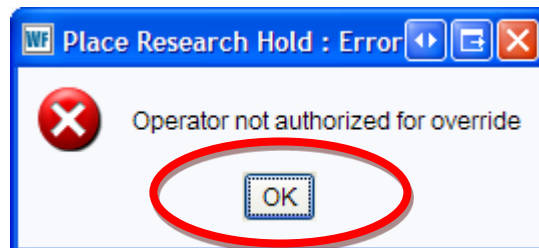
21. After selecting the number of items needed, click the “Place Blanket Hold” button on the bottom of the “Place Research Hold” screen. This is when the holds are placed.

If a hold cannot be placed the following box will appear. This pop up box cannot be overridden. You may receive several “No Hold Allowed Override” popups if you have select multiple items that do not allow holds.



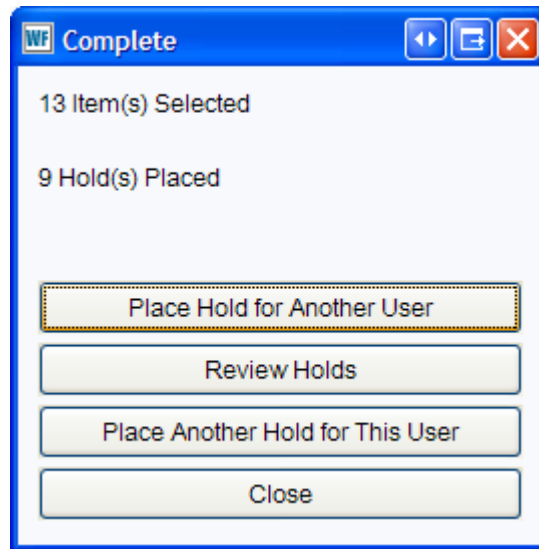
22. Click the “Do not Place Hold” button.

If the RSA override is entered the following error box will appear:



23. Click the “OK” button.

The following pop up box will appear:



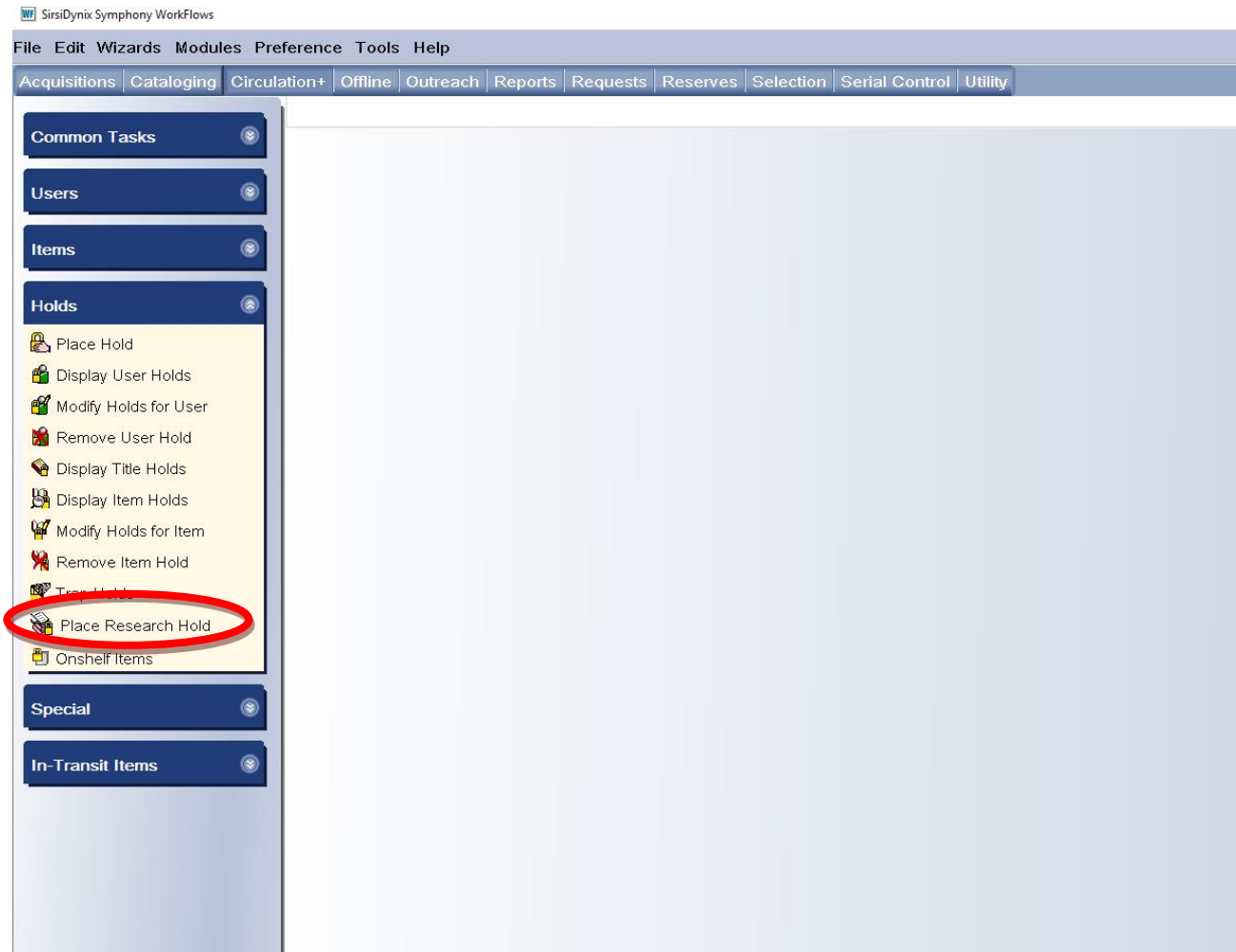
The “Complete” pop up box shows how many items were selected and how many holds were placed from the items selected. In the example above 13 items were selected and only 9 actual holds were placed. If the patron needs more items, click the “Place Another Hold for This User” button and return to step 3.

Reminder:

- Choose Copy level holds in the “Place Research Holds” pop up box.
- Place holds on more items than you need.
- Items can be selected from more than one bibliographic record of the same title.
- After the original number of items needed arrive, WorkFlows will automatically cancel the remaining holds.

Placing Research Holds

Research Holds are used when a patron needs multiple titles on a certain subject.



1. Log on with the CIRC login.
2. In the Circulation module, open the “Place Research Hold” wizard on the Holds group.

The screenshot shows the 'Place Research Hold' interface. On the left is a vertical navigation menu with items like 'asks', 'User Holds', 'Title Holds', etc. The main area is titled 'Place Research Hold' and contains several sections: 'User Information', 'Item information', 'Blanket Hold Info', 'Hold Info', and 'List of Holds'. The 'User ID' field under 'Identify User' is circled in red, containing the value 'D150098765'. The 'Get User Information' button at the bottom is also circled in red. Other buttons include 'Add to List', 'Place Blanket Hold', 'Place Hold for Another User (b)', 'Clear (g)', and 'Close'. The 'List of Holds' table is currently empty.

3. Enter the user ID in the “User ID” box under Item Information.
4. Click the “Get User Information” button on the bottom of the screen.

5. A “Place Research Hold” box will pop up.

Blanket Hold Info:

Blanket ID: NEW Copies needed:

Pickup at: AG_ALS-PDC Expires:

Level/Range

Level: Copy Title

Range: Library Group System

Recall status

Allow Recall No Recall Recall now (RUSH)

OK Close


6. Use the following information to fill in the boxes on the “Place Research Hold” pop up box.

Blanket Holds Info:

Blanket ID: The Blanket ID box should contain the word NEW.

Copies needed: Enter the number of copies needed

Pickup at: Select your library from the drop down list.

Expires: An expiration date is required. Use the calendar gadget  at the end of the box to select a date. After this date your patron can no longer use the items.

Level/Range

Level: Select the radio button in front of Title.

Range: Select the radio button in front of System.

Recall Status:

Select the radio button in front of No Recall.

Blanket Hold Info:

Blanket ID: NEW Copies needed: 4

Pickup at: AG_ALS-PDC Expires: 08/26/2011

Level/Range

Level: Copy Title

Range: Library Group System

Recall status

Allow Recall No Recall Recall now (RUSH)

OK Close

7. Click the “OK” button on the bottom of the “Place Research Hold” pop up box.

You will now begin searching for the subject in WorkFlows.

Workflows: Place Research Hold

Libraries Modules Preference Tools Help

Cataloging Circulation+ Offline Outreach Reports Requests Reserves Selection Serial Control Utility

Display User x Place Research Hold x

Place Research Hold

User Information

Name:	STARFISH, PATRICK	Status:	DELINQUENT	Library:	AG_ALS-PDC
Profile name:	LIBRARYUSE...	Amount owed:	\$9.00	Available holds:	0
User categories:	Y	Overdues:	0		
Group ID:	2014	Privilege expires:	NEVER		

Item information

Identify User

User ID:	<input type="text" value="D150098765"/>	Street:	4819 SA
		City, state:	BOTTOM
		Zip:	98765
		Phone:	309-123

Identify item

Item ID:

Blanket Hold Info:

Blanket ID:	NEW	Copies needed:	8	Expires:	08/17/2017
Level:	COPY	Range:	SYSTEM	Recall status:	NO

Hold Info

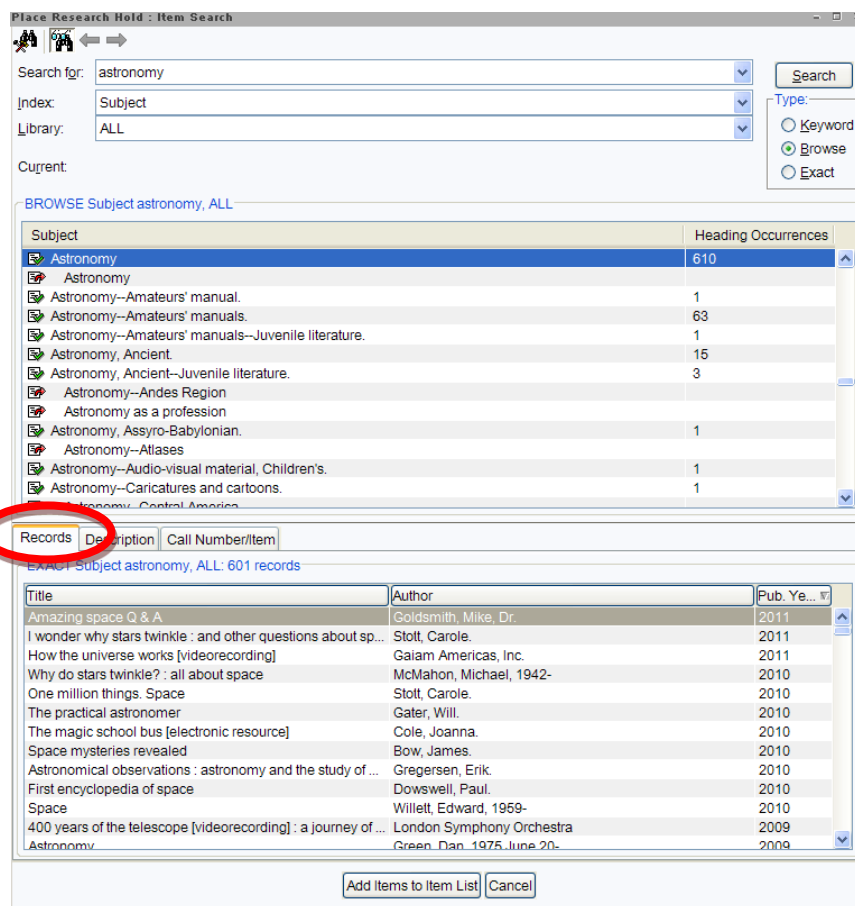
Pickup at: Comments:

List of Holds

Place Hold	Title	Item ID
------------	-------	---------

8. Click the "Item Search" helper at the top of the screen.

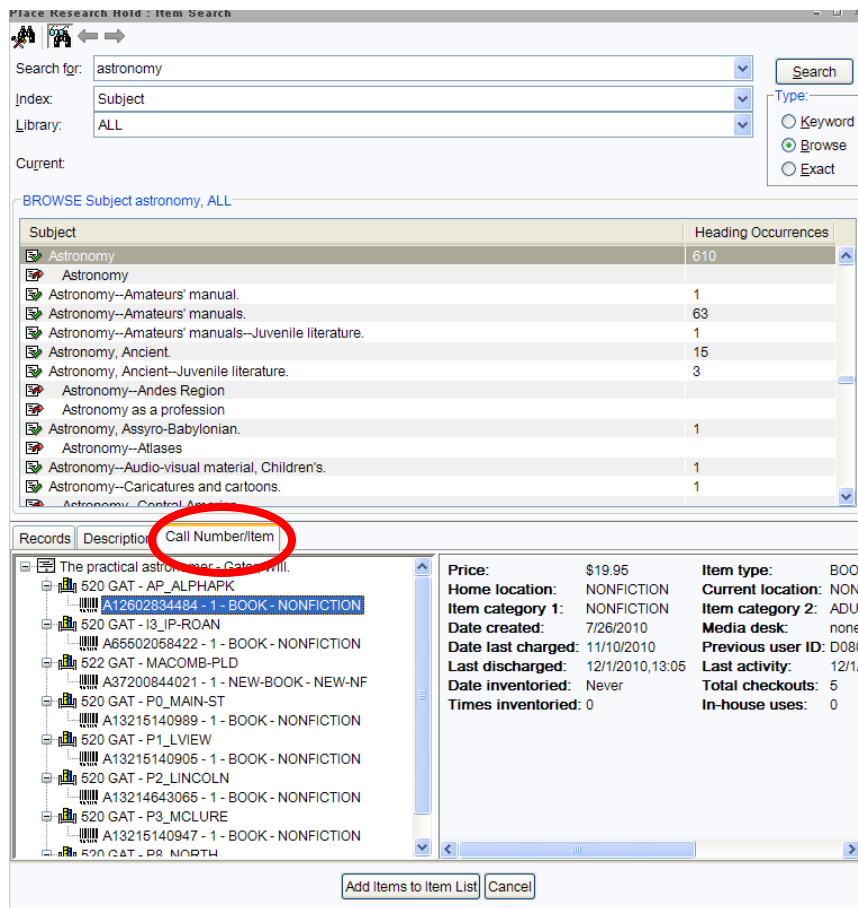
9. The “Place Research Hold: Item Search” pop up box will appear



10. Search for the subject your patron is requesting. The results will appear on the display window.

11. Highlight a subject in the display window.

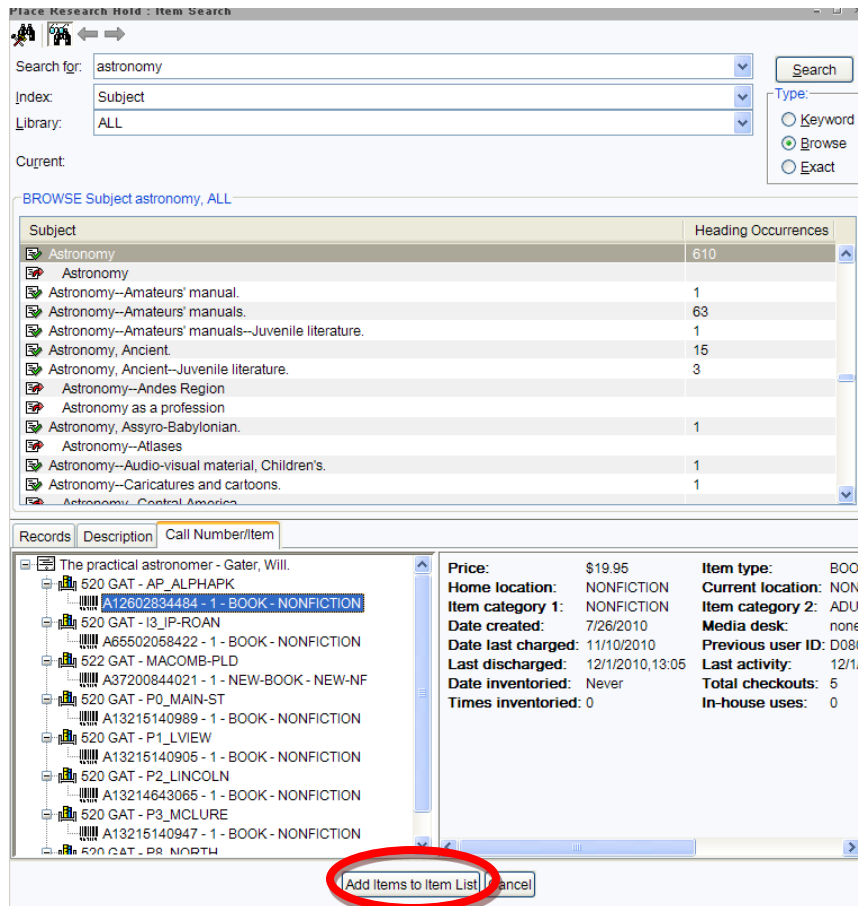
12. Select the “Records” tab and highlight a title in the “Records” tab display.



13. Select the "Call Number/Item" tab.
14. Look at the tree on the Call Number/Item tab for:
 - How many libraries own the title
 - How many items have the Item type of NEW-BOOK or BOOK-NEW (these books may not be available for a hold)
 - How many items have the Home location of OSTACK (these items are owned by an offline library and can only be requested via a fax sent to the owning library)

If the title you selected does not have holdable copies go back to the "Records" tab and select another title.

Using the "Research Hold" wizard does not limit holds to just one title record, you can select items from multiple title records.



15. Highlight an item from the tree that is either on the shelf or is not a NEW-BOOK, BOOK-NEW or OSTACK.
16. Click the “Add items to the Item List” button on the bottom of the pop up box. You can select an item that is “Checkedout”.
17. After you click the “Add Items to Item List” button, the pop up box will disappear and you will return to the “Place Research Hold” screen.

Wizards Modules Preference Tools Help

Cataloging Circulation+ Offline Outreach Reports Requests Reserves Selection Serial Control Utility

Display User x Place Research Hold x

Place Research Hold

User Information

Name:	STARFISH, PATRICK	Status:	DELINQUENT	Library:	AG_ALS-PDC
Profile name:	LIBRARYUSE...	Amount owed:	\$9.00	Available holds:	0
User categories:	Y	Overdues:	0	Previous II	
Group ID:	2014	Privilege expires:	NEVER	Active IDs:	

Item information

Identify User

User ID:	<input type="text" value="D150098765"/>	Street:	4819 SANDY L
		City, state:	BOTTOM OF T
		Zip:	98765
		Phone:	309-123-4567

Identify item

Item ID:

Blanket Hold Info:

Blanket ID:	NEW	Copies needed:	8	Expires:	08/17/2017
Level:	COPY	Range:	SYSTEM	Recall status:	NO

Hold Info

Pickup at: Comments:

List of Holds

Place Hold	Title	Item ID	Cor
------------	-------	---------	-----

Get User Information Add to List Place Blanket Hold Place Hold for Another User (b) Clear (g) Close

You have not place a hold on the item yet.

18. Click the “Add to List” button on the bottom of the screen. This will add the title to List of Holds display box.

Wizards Modules Preference Tools Help

Cataloging Circulation+ Offline Outreach Reports Requests Reserves Selection Serial Control Utility

Display User x Place Research Hold x

Place Research Hold

User Information

Name: **STARFISH, PATRICK** Status: **DELINQUENT** Library: **AG_ALS-PDC**
 Profile name: **LIBRARYUSE...** Amount owed: **\$9.00** Available holds: **0** **Prev**
 User categories: **Y** Overdues: **0** **Activ**
 Group ID: **2014** Privilege expires: **NEVER**

Item information

Identify User

User ID: Street: **4819 SA**
 City, state: **BOTTOM**
 Zip: **98765**
 Phone: **309-123-**

Identify item

Item ID:

Blanket Hold Info:

Blanket ID: **NEW** Copies needed: **8** Expires: **08/17/2017**
 Level: **COPY** Range: **SYSTEM** Recall status: **NO**

Hold Info

Pickup at: **AG_ALS-PDC** Comments:

List of Holds

Place Hold	Title	Item ID

Get User Information **Add to List** Place Blanket Hold Place Hold for Another User (b) Clear (g) Cl

19. Click the Item Search Helper again to choose more titles. You will return to the result list of the subject you were searching.
20. Select and highlight another title and use the "Add to List" button on the popup box and then the "Add to list" button on the "Place Research Hold" wizard screen.
21. Repeat steps 19 and 20 until you have selected more titles than the number you entered in the "Copies needed" box on the "Place Research Hold" pop up box.

Place Research Hold *

User Information

Name: STARFISH, PATRICK Status: DELINQUENT Library: AG_ALS-PDC
Profile name: LIBRARYUSE... Amount owed: \$9.00 Available holds: 0 Previous ID: A15009876
User categories: Y Overdues: 0 Active IDs: A15009876
Group ID: 2014 Privilege expires: NEVER

Item information

Identify User

User ID:

Street: 4819 SANDY LANE
City, state: BOTTOM OF THE OCEAN
Zip: 98765
Phone: 309-123-4567

Identify item

Item ID:

Blanket Hold Info:

Blanket ID: NEW Copies needed: 4 Expires: 08/11/2017
Level: TITLE Range: SYSTEM Recall status: NO

Hold Info

Pickup at: Comments:

List of Holds

Place Hold	Title	Item ID	Comments
<input checked="" type="checkbox"/>	American eclipse : a nation's epic race to catch...	A22101128779	
<input checked="" type="checkbox"/>	Exploring the mysteries of the universe	A13002155070	
<input checked="" type="checkbox"/>	National Geographic pocket guide to the night ...	A36701060772	
<input checked="" type="checkbox"/>	The glass universe : how the ladies of the Harv...	A35520519649	
<input checked="" type="checkbox"/>	The stars : a new way to see them	A34200626512	
<input checked="" type="checkbox"/>	Night sky with the naked eye : how to find p...	A36580795085	

Get User Information | Add to List | **Place Blanket Hold** | Place Hold for Another User (b) | Clear (g) | Close

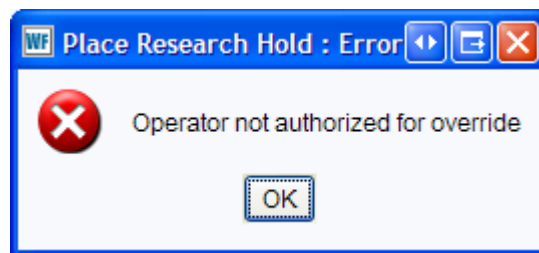
22. After selecting the number of titles needed, click the “Place Blanket Hold” button on the bottom of the “Place Research Hold” screen. This is when the holds are placed.

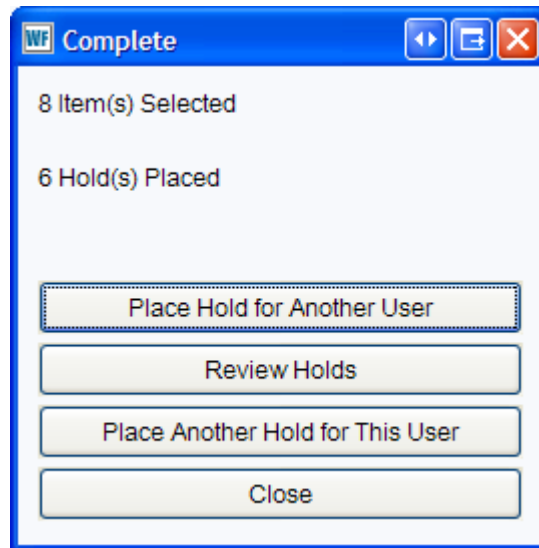
If a hold cannot be placed the following box will appear. This pop up box cannot be overridden. You may receive several “No Hold Allowed Override” popups if you have select multiple items that do not allow holds.



23. Click the “Do Not Place Hold” button.

If the RSA override is entered the following error box will appear:





The "Complete" pop up box shows how many items were selected and how many holds were placed from the items selected. In the example above 8 items were selected and only 6 actual holds were placed. If the patron needs more items, click on the "Place Another Hold for This User" button and return to step 3.

Reminder:

- Choose Title level holds in the "Place Research Holds" pop up box
- Place holds on more titles than you need
- After the original number of titles needed arrive, WorkFlows will automatically cancel the remaining holds.

Questions ?? Contact the RSA help desk at rsahelp@railslibraries.info or RSA staff at 866-940-4083.