RSA NFP

Resource Sharing Alliance NFP

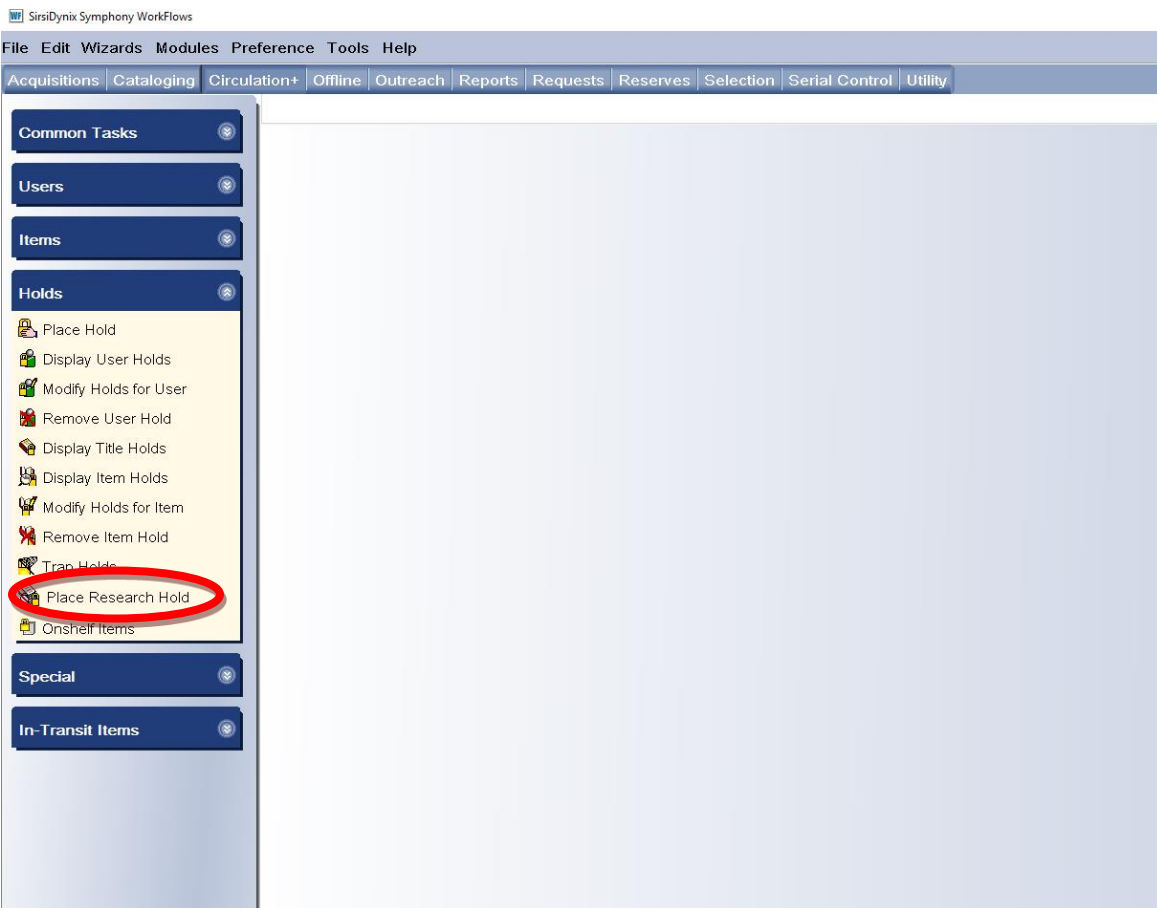715 Sabrina Drive   East Peoria, IL 61611

866-940-4083

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.

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
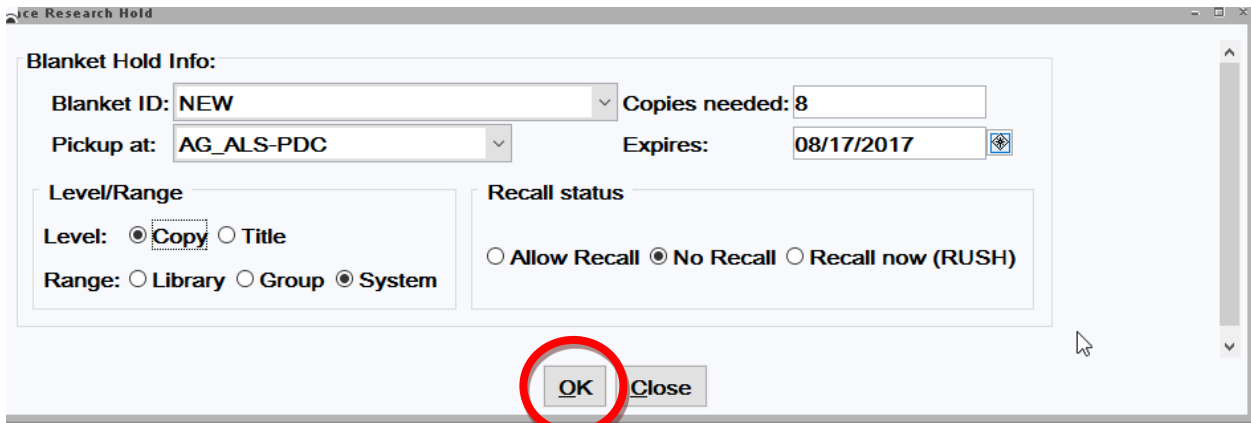**Level/Range**
    Level: Select the radio button in front of Copy. (This is very important for receiving multiple copies)
    Range: Select the radio button in front of System.
Recall Status:
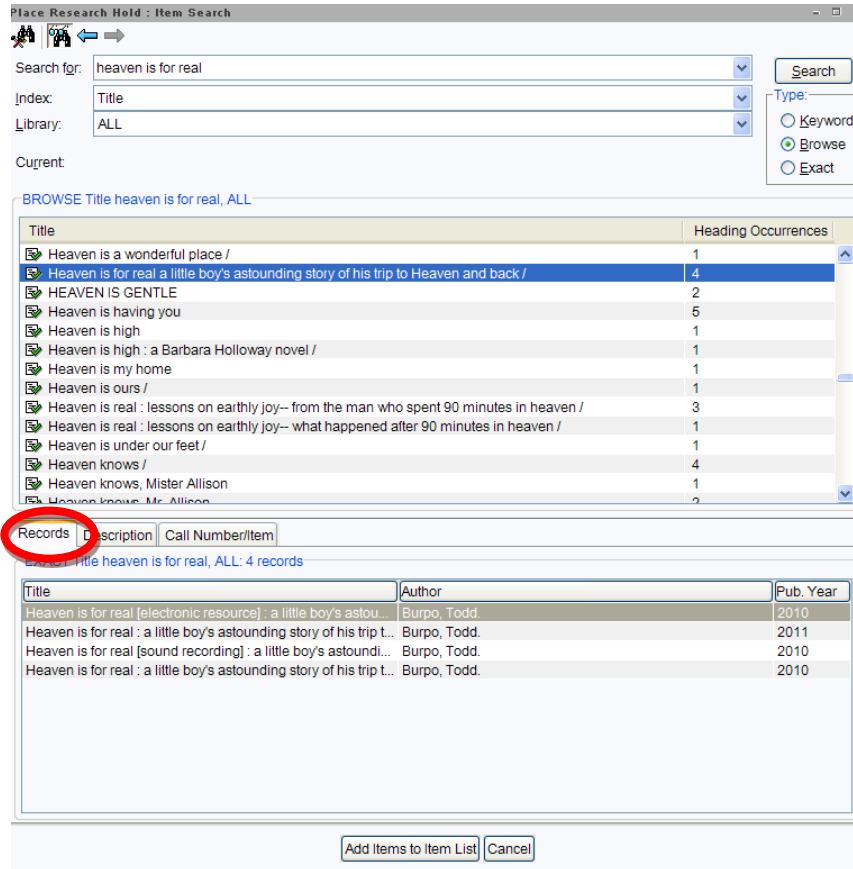   Select the radio button in front of No Recall.

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

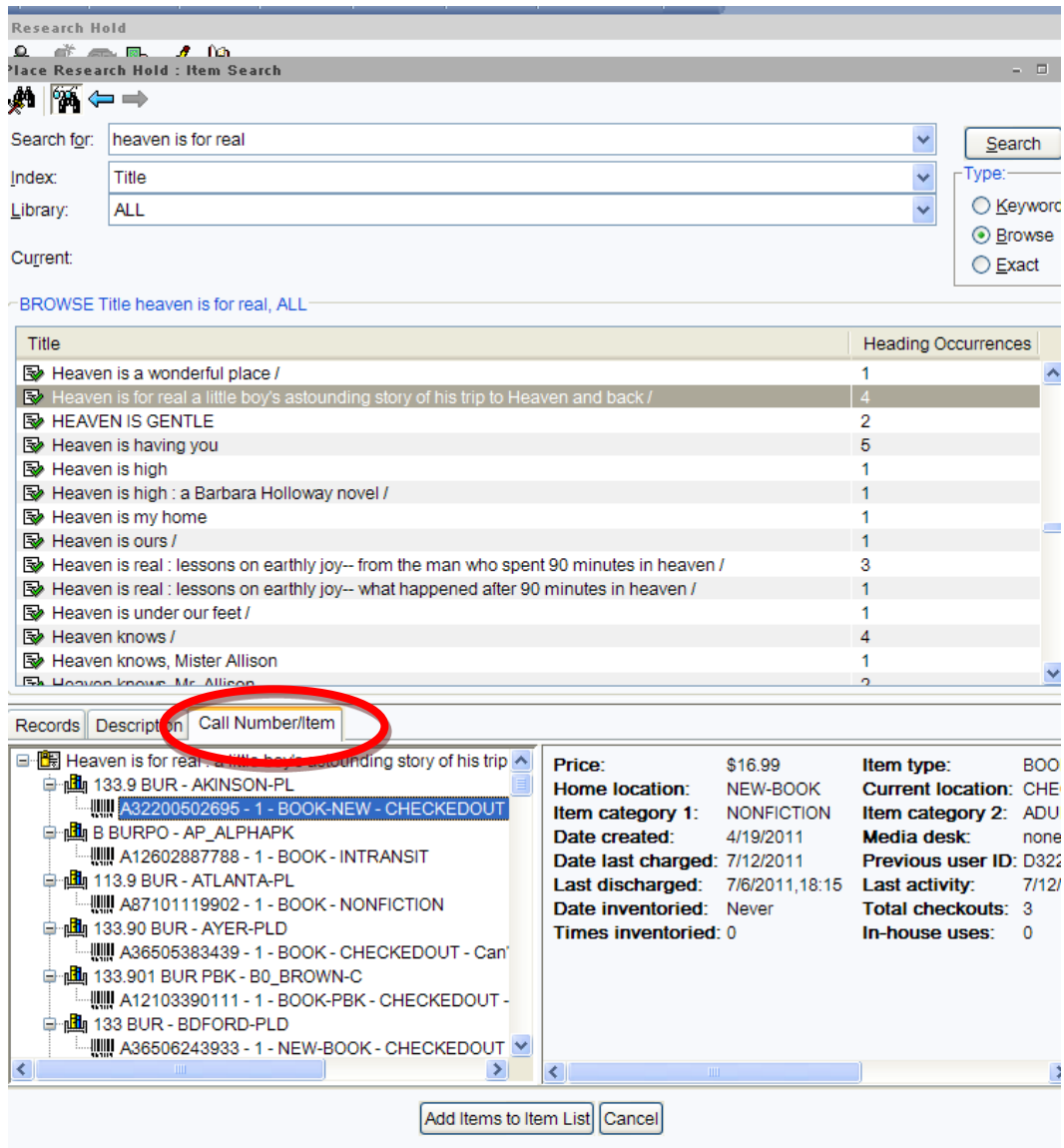You will now begin searching for copies of the title in WorkFlows.

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

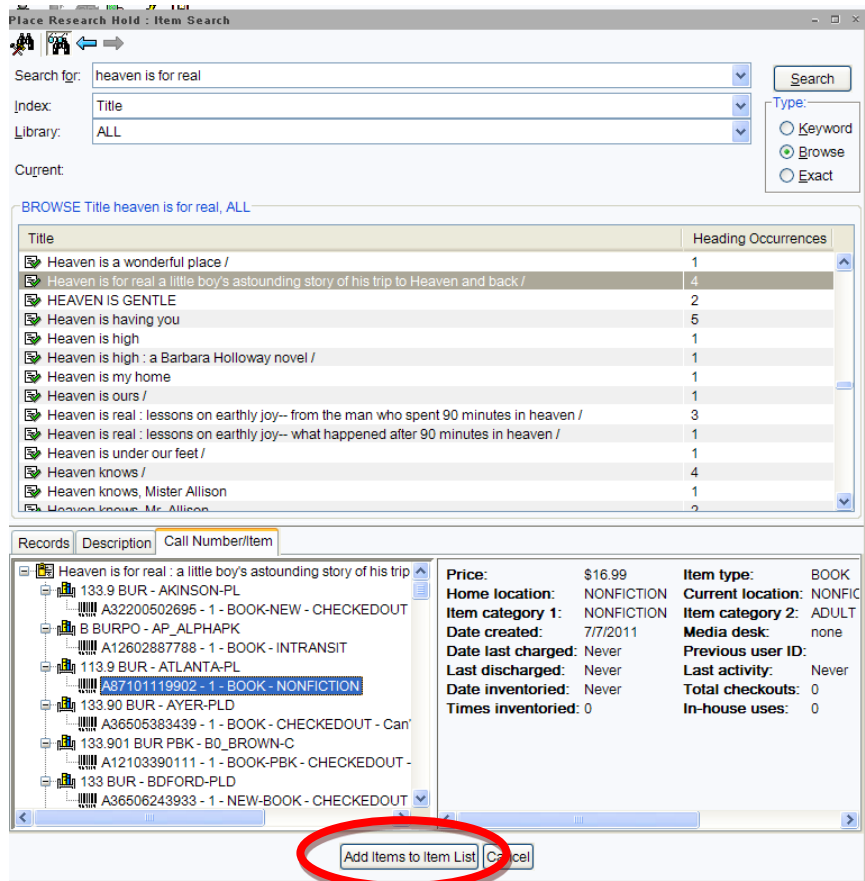9.   The "Place Research Hold: Item Search" pop up box will appear.

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:
    o How many libraries own the title
    o How many items have the Item type of NEW-BOOK or BOOK-NEW (these books may not be available for a hold)
    o 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.

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.

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.

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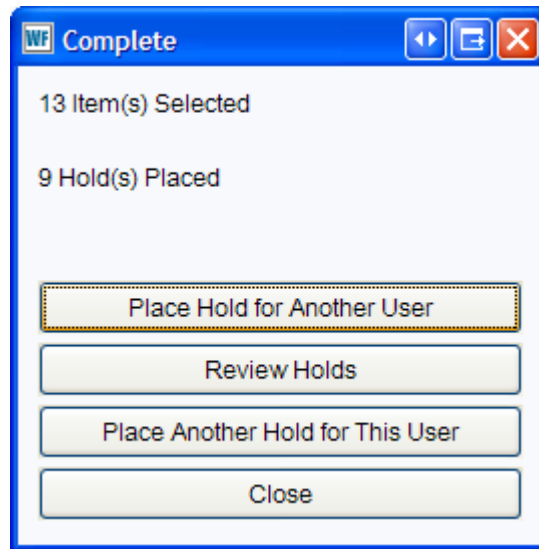
The "Complete" pop up box shows how many items were selected and how many holds were place from the items selected. In the example above 13 items were selected and only 9 actual holds were placed. If the patron needs more items, click the "Place Another Hold for This User" button and return to step 3.

Reminder:

- Choose Copy level holds in the "Place Research Holds" pop up box.
- Place holds on more items then 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.
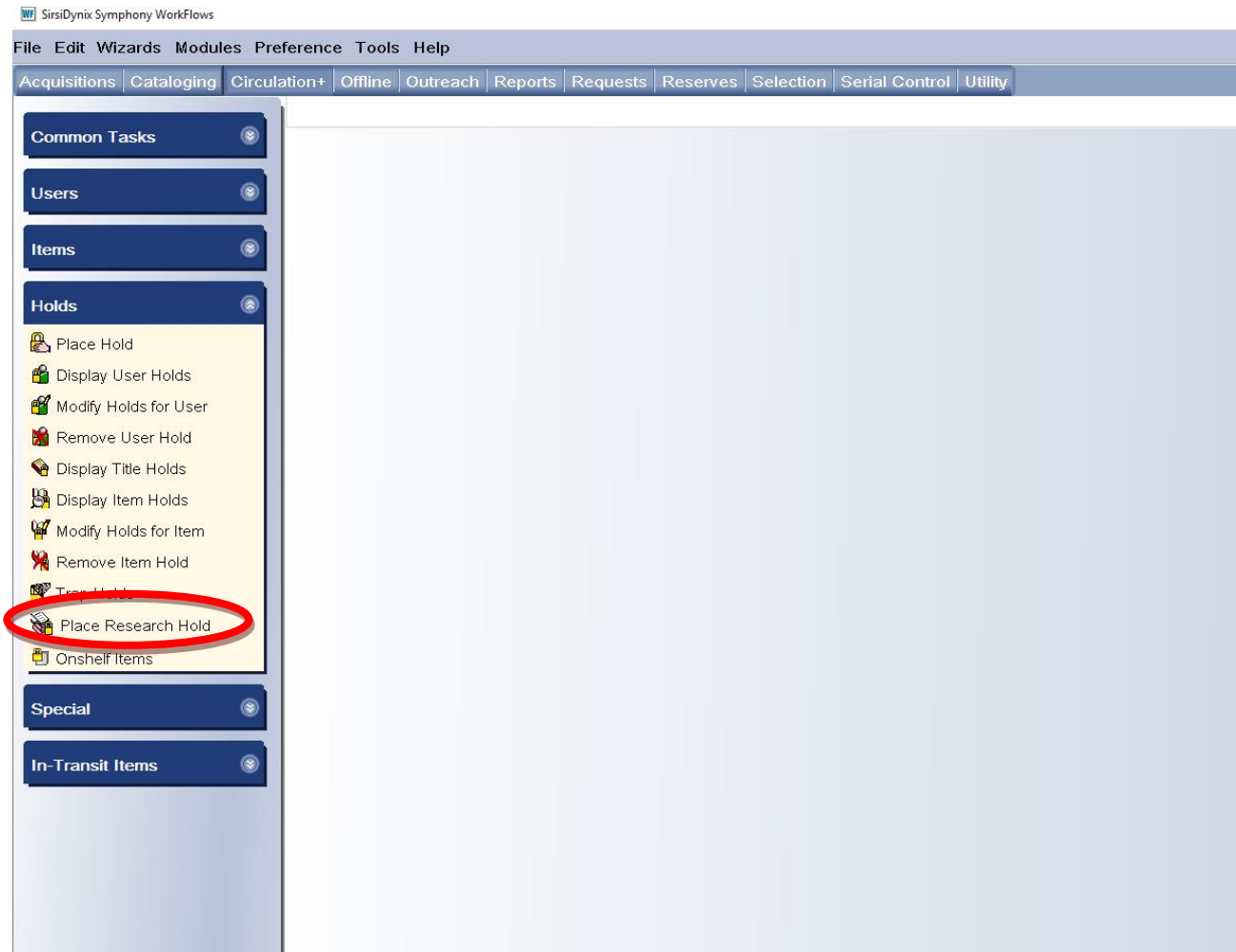
1.   Log on with the CIRC login.

2.   In the Circulation module, open the "Place Research Hold" wizard on the Holds group.

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.

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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. 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.

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.

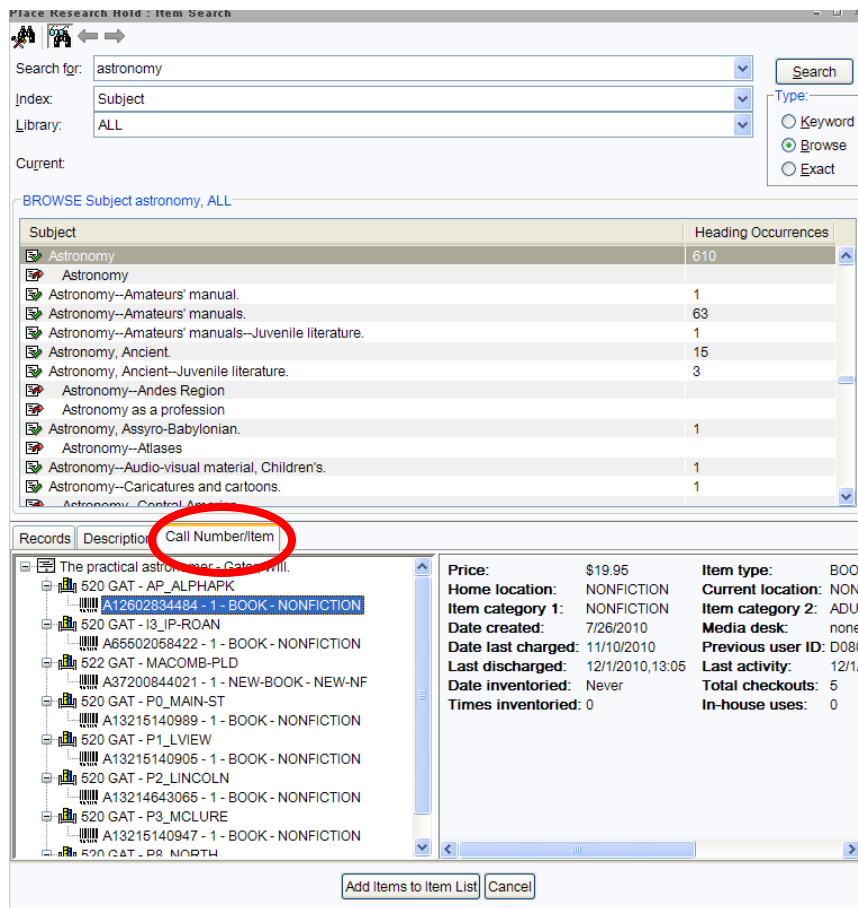8.   Click the "Item Search" helper at the top of the screen.

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.
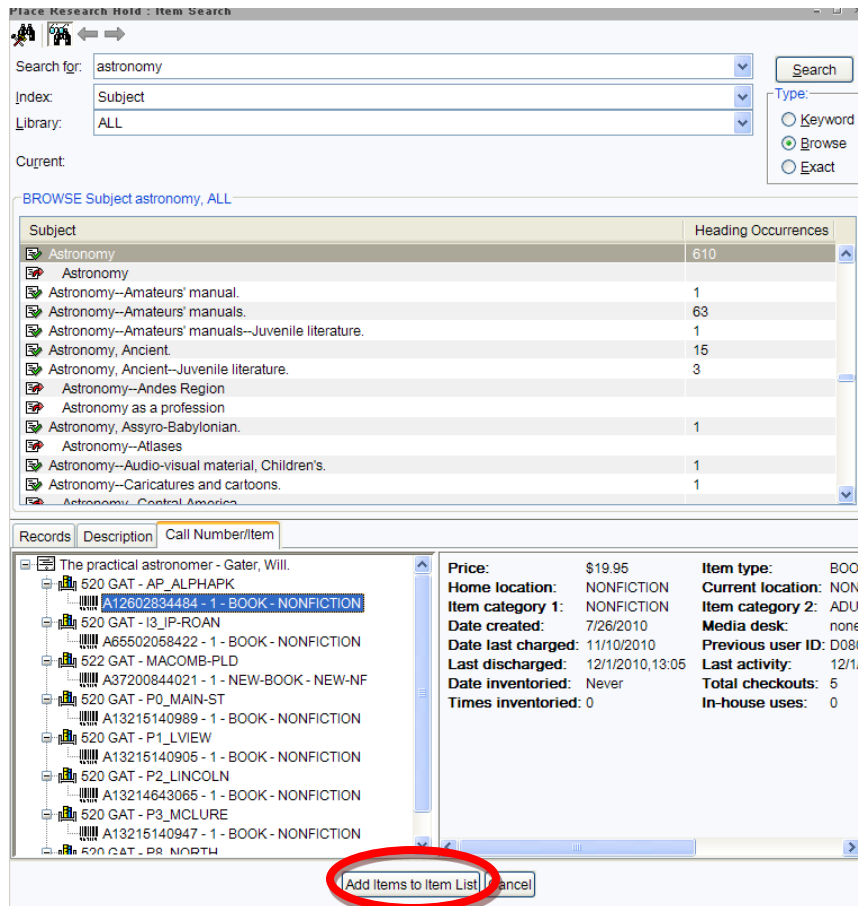
11.   Highlight a subject in the display window.

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:
    o How many libraries own the title
    o How many items have the Item type of NEW-BOOK or BOOK-NEW (these books may not be available for a hold)
    o 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.

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.

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.
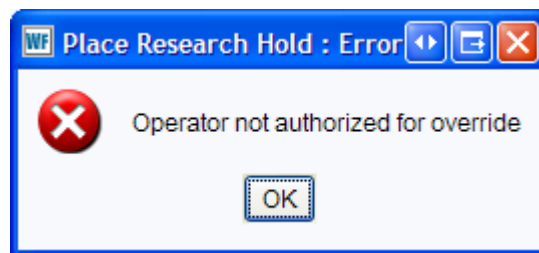
22.   After selecting the number of titles needed, click the "Place Blanket Hold" button on the bottom of the "Place Research Hold" screen. This is when the holds are placed.
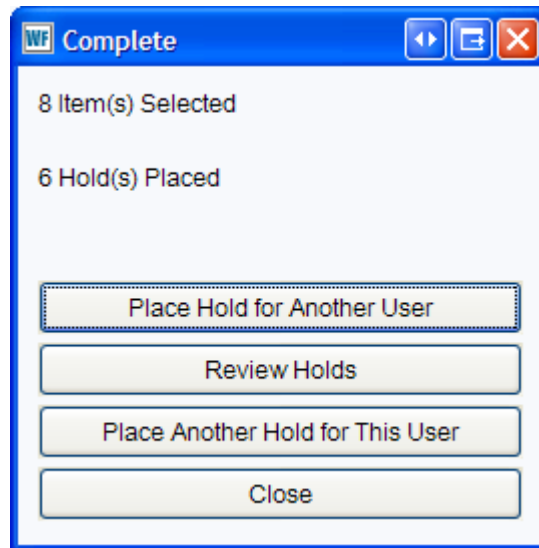
If a hold cannot be placed the following box will appear. This pop up box cannot be overridden. You may receive several "No Hold Allowed Override" popups if you have select multiple items that do not allow holds.

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 place 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 then 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.