

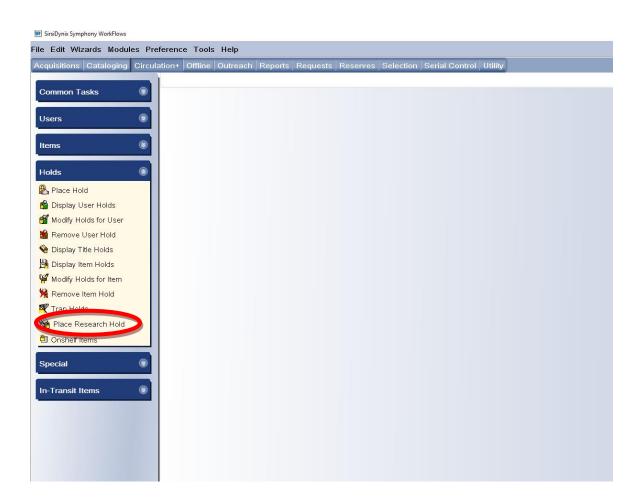
Resource Sharing Alliance NFP

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.

phony WorkFlows: Place Researc	ch Hold			1
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asks 🛞	Place Research Hold			
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	User Information			
0	Name:	Status: Library:		
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ld				
Jser Holds	Item information			
olds for User	Identify User			
User Hold	User ID: D150098765			
Title Holds	Identify item			
tem Holds	Item ID:			
olds for Item	Blanket Hold Info:			
Item Hold	Blanket ID:	Copies needed:	Expires:	
ds	Level: TITLE	Range: SYSTEM	Recall status: NO	
esearch Hold	Hold Info			
tems	Pickup at: AG_ALS-PDC	Comments:		
	List of Holds			
	Place Hold	Title	Item ID	Comments
tems 🛞				
		Get User Add 1	o Place Hold	
		Information	Place Blanket Hold	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.

Place Research Hold			-	
Blanket Hold Info:-				
Blanket ID:	NEW	Copies needed:		
Pickup at:	AG_ALS-PDC	Expires:		
_ Level/Range	]	Recall status		
Level: OCopy Range: Libra	/	O Allow Recall  No Recall  Recall now (RUSH)		

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.

Blanket ID:	NEW	`	Copies neede	ed: 8		
Pickup at:	AG_ALS-PDC	$\sim$	Expires:	08/17/2017		
Level/Rang	e	Recall statu	JS			
Level:   C	opy O Title	O Allow Re	call @ No Reca	II O Recall now (RUSH)		
Range: O Li	brary O Group					
					67	

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.

nphony WorkFlows: Place Rese	arch Hold						
izards Modules Pr	eference Tools He	lp					
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Ŵ	User Information	n					
(2)	Name:	STARFISH, PATRICK		DELINQUENT	Library:	AG_ALS-PDC	_
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old			5 1				
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lolds for User	Identify User						
User Hold						Street:	4819 SA
Title Holds	User ID: D1500	98765				City, state: Zip:	: BOTTON 98765
Item Holds						Phone:	309-123-
lolds for Item	Identify item						
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0	Hold Info						
	Pickup at: AG_	ALS-PDC	Comments:				
Items 🛞	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.

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earch f <u>o</u> r:	heaven is for real		*	Search
dex:	Title		~	Type:
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Se Heave			1	
	en is high : a Barbara Holloway novel /		1	
	en is my home		1	
	en is ours /		1	
Heave	en is real : lessons on earthly joy from the man w	3		
Heave	en is real : lessons on earthly joy what happened	1		
Heave	en is under our feet /	1		
😼 Heave	en knows /	4		
🥪 Heave	en knows, Mister Allison		1	
	n knowe Mr. Allicon		2	
	scription Call Number/Item			
	le heaven is for real, ALL: 4 records			)(
Fitle		Author		Pub. Year
	for real [electronic resource] : a little boy's astou			2010
	for real : a little boy's astounding story of his trip t.			2011
	for real [sound recording] : a little boy's astoundi			2010
Heaven is	for real : a little boy's astounding story of his trip t	Burpo, Todd.		2010

- 10. Highlight the title on the display window.
- 11. Select the "Records" tab and highlight the title in the "Records" tab display.

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Research H			
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	n is having you		5
By Heave			1
	n is high : a Barbara Holloway novel /		1
	n is my home		1
By Heave		100	1
	en is real : lessons on earthly joy from the man who spen		3
	n is real : lessons on earthly joy what happened after 90 n is under our feet /	) minutes in heaven /	1
Steave			4
	n knows /		1
	in knowe, Mr. Allison		2
Records [	Description Call Number/Item		
	ven is for real a little bay's accounding story of his trip 🔨	Price: \$16.99	Name Array DOO
	33.9 BUR - AKINSON-PL	Price: \$16.99 Home location: NEW-BOOK	Item type: BOO Current location: CHE
1 mmmal	A32200502695 - 1 - BOOK-NEW - CHECKEDOUT	Item category 1: NONFICTION	Item category 2: ADU
	BURPO - AP ALPHAPK	Date created: 4/19/2011	Media desk: none
	M A12602887788 - 1 - BOOK - INTRANSIT	Date last charged: 7/12/2011	Previous user ID: D32
	13.9 BUR - ATLANTA-PL	Last discharged: 7/6/2011,18:15	
	A87101119902 - 1 - BOOK - NONFICTION	Date inventoried: Never	Total checkouts: 3
	33.90 BUR - AYER-PLD	Times inventoried: 0	In-house uses: 0
	MA36505383439 - 1 - BOOK - CHECKEDOUT - Can	Thirds inventoried.	
	33.901 BUR PBK - B0 BROWN-C		
i i i i i i i i i i i i i i i i i i i	33 BUR - BDFORD-PLD		
	🛄 A36506243933 - 1 - NEW-BOOK - CHECKEDOUT 💌		
<		<	
	Add Items to Ite	em List Cancel	

- 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.

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earch for:	heaven is for real			· · ·	earch
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BROWSE 1	Title heaven is for real, ALL				
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	EN IS GENTLE			2	
Heave	n is having you			5	
😼 Heave	n is high			1	
leave	n is high : a Barbara Holloway novel /			1	
😼 Heave	n is my home			1	
😼 Heave	n is ours /			1	
😼 Heave	n is real : lessons on earthly joy from the man who sper	nt 90 minutes in heaven	/	3	
	n is real : lessons on earthly joy what happened after 90	) minutes in heaven /		1	
😼 Heave	n is under our feet /			1	
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	n knows, Mister Allison			1	
The Hoover	n knowe Mr. Allison			0	
ecords	Description Call Number/Item				
🗄 Heav	/en is for real : a little boy's astounding story of his trip	Price:	\$16.99	Item type:	BOO
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- 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.

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sitions Cataloging Circulation+ Offline Outreach Reports Requests Reserves Selection Serial Control Utility	
Imon Tasks	
rs	
Image: state       State: State       DELINQUENT       Library:       AG_ALS-PDC         Profile name:       LIBRARYUSE       Amount owed:       \$9.00       Available holds: 0       Previous ID: A150098765         Iss       Image: state       Overdues:       0       Active IDs:       A150098765,D150098765         Iss       Group ID:       2014       Privilege expires: NEVER       Active IDs:       A150098765,D150098765	
Item information	
Visipiay User Holds for User Lifentify User Street: 4819 SANDY LANE City, state: BOTTOM OF THE OCEAN PA City, state: BOTTOM OF THE OCEAN P	
todify Holds for Item     Identify item       term Hold     Identify item	
rap Holds     Blanket Hold Info:       Place Research Hold     Blanket ID: NEW       Copies needed: 8     Expires:       08/17/2017       Level:     COPY       Range:     SYSTEM       Recall status: NO	
ctal  Comments:	
ransit Items	
Place Hold Title Item ID Comments	
Information List Pf the Blanket 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.

phony WorkFlows: Place	e Research	Hold										
zards Helpers	Modu	les Preference T	ools Help									
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(		Name: Profile name:	STARFISH, P		Status: Amount owed:	DELING \$9.00	UENI	Library: Available	AG_AL holds: 0	S-PDC	Pre	evious ID:
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(		Group ID:	2014		Privilege expire	: NEVER						
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Jser Holds olds for User		Identify User										
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Fitle Holds		User ID: D1500	98765							City, state: Zip:	98765	MOFTH
tem Holds										Phone:	309-123	3-4567
olds for Item		Identify item										
Item Hold		Item ID:										
ds esearch Hold Items		Blanket Hold Inf Blanket ID: NEV Level: COF	v	Copies r Range:	needed: 8 SYSTEM		Expires: Recall status:	08/17/201 NO	7			
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			Z		Heaven is for	real : a litt	le boy's astoun	din <u>A864</u>	86152598			
					Get User Information	Add to List	Place Blanket	t Hold fo	Place Hold or Another Use	Clea	ar (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 Rese	arch Hold	99+	• 🗗 – 🗆
Wizards Helpers Mo	dules Preference Tools Help		R
ns Cataloging Circul	ation+ Offline Outreach Reports Requests	Reserves Selection Serial Control Utility	
n Tasks 🛞	Display User * Place Research Hold * Place Research Hold * Place Research Hold * User Information		
® ® Hold	Name:         STARFISH, PATRICK         S           Profile name:         LIBRARYUSE         A           User categories:         Y         O	tatus: DELINQUENT Library: AG_ALS mount owed: \$9.00 Available holds: 0 verdues: 0 rivilege expires: NEVER	PDC Previous ID: A150098765 Active IDs: A150098765,D150098765
ay User Holds	Item information		
y Holds for User we User Hold ay Title Holds ay Item Holds	Identify User User ID: D150098765		Street:         4819 SANDY LANE           City, state:         BOTTOM OF THE OCEAN PA           Zip:         98765           Phone:         309-123-4567
y Holds for Item	Identify item		
ve Item Hold	Item ID:		
Holds e Research Hold elf Items	Blanket Hold Info: Blanket ID: NEW Copies nee Level: COPY Range:	ded: 8 Expires: 08/17/2017 SYSTEM Recall status: NO	
۲	Hold Info		
sit Items 🛞	Pickup at: AG_ALS-PDC   List of Holds	Comments:	
	Place Hold	Title Item ID	Comments
		Heaven is for real : a little boy's astoundi A86486152598	
		Heaven is for real : a little boy's astoundi A36502847010	
		Heaven is for real : a little boy's astoundi A33601873108	
		Heaven is for real : a little boy's astoundi A35580265682	
		Heaven is for real : a little boy's astoundi A74000435711	
		Heaven is for real : a little boy's astoundi <u>A93000178529</u> Heaven is for real : a little boy astourion. <u>A</u> 32200502695	
		Get User Information List Place Blanket Hold Place Hold Prace Blanket Hold Place Hold Place Hold	(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.

🔤 Place Research Hold : No Hold Allowed Ov ᠥ 🖃 🔀					
Hold not allowed					
133.9 BUR A35520433788 Heaven is for real : a little boy's astounding story of his trip Burpo, Todd.					
No hold allowed override:					
Override & Place Hold Do Not Place Hold					

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:

🐨 Complete 🛛 🖸 🖬	×
13 Item(s) Selected	
9 Hold(s) Placed	
Place Hold for Another User	
Review Holds	]
Place Another Hold for This User	]
Close	]

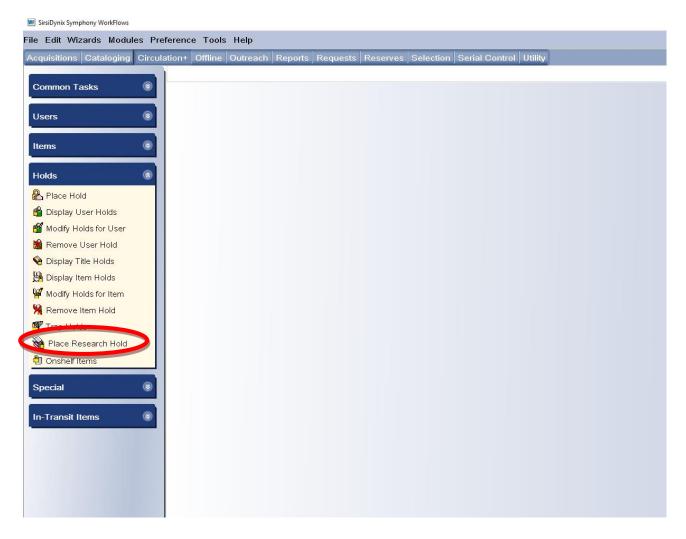
The "Complete" pop up box shows how many items were selected and how many holds were place from the items selected. In the example above 13 items were selected and only 9 actual holds were placed. If the patron needs more items, click the "Place Another Hold for This User" button and return to step 3.

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.

phony WorkFlows: Place Resea	arch Hold			
zards Helpers Moo	dules Preference Tools Help			
Cataloging Circula	ation+ Offline Outreach Reports Requests	Reserves Selection Serial Control Utility		
asks 🛞	Display User × Place Research Hold × Place Research Hold ×			
8	Name:Status:Profile name:Amount owed:User categories:Overdues:Group ID:	Library: Available holds:		
old	Item information			
Jser Holds	Identification			
olds for User	User ID: D150098765			
User Hold	Identify item			
Title Holds	Item ID:			
tem Holds				
olds for Item	Blanket Hold Info:			
ltem Hold ds	Blanket ID: Copies needed Level: TITLE Range:	: Expires: SYSTEM Recall status: NO		
esearch Hold				
tems	Hold Info Pickup at: AG_ALS-PDC  V	Comments:		
۲	List of Holds			
tems 🛞	Place Hold	Title	Item ID Co	omment
		Get User Information 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.

P	ace Research Hold							- 1	□ ×
	Blanket Hold Info:						)		
	Blanket ID:	NEW		<ul> <li>Copies neede</li> </ul>	d:				
	Pickup at:	AG_ALS-PDC	*	Expires:	*				
	- Level/Range		Recall st	atus					
	Level: O Copy Range: Libra	γ ⊙ Title ary  ◯ Group ⊙ System	Allow	/ Recall 💿 No Re	ecall 🔘 Recall now (RUSH	H)			
				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 B 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.

lace Research Hold	F and		- 🗆 ×
Blanket ID:	NEW AG_ALS-PDC	Copies needed: 4     Expires: 09/26/2011 (*)	
Level/Range Level: O Copy Range: Libra	r ⊙ Title ry ◯ Group ⓒ System	○ Allow Recall    No Recall    Recall now (RUSH)	

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.

nphony Work	(Flows: Place Resea	irch Hold						
izards N	Aodules Pre	ference Tools He	lp					
;   Catalo	ging Circula	ation+ Offline Out	reach Reports Request	ts Reserves Se	lection Serial Contro	ol Utility		
⊺asks	8	Display User × F Place Research Hold User Informatio						
	۲	Name:	STARFISH, PATRICK	Status:	DELINQUENT	Library:	AG_ALS-PDC	
	Ŵ	Profile name:	LIBRARYUSE	Amount owed:	\$9.00	Available holds	s: 0	Prev
	۲	User categories Group ID:	s: <u>Y</u> 2014	Overdues: Privilege expire				Acti
old		Item information		T Invitege expire	3. NEVEN			
User Hold	ls							
lolds for L	Jser	Identify User					0.	4040.04
: User Ho	d						Street: City, state:	4819 SA
Title Hold	s	User ID: D1500	98765				Zip:	98765
Item Hold	s						Phone:	309-123
lolds for I	:em	Identify item						
e Item Hol	d	Item ID:						
dds								
kesearch l	Hold	Blanket Hold In						
Items		Blanket ID: NEV	•	needed: 8	Expires:	08/17/2017		
Terns		Level: COF	PY Range:	SYSTEM	Recall sta	atus: NO		
	8	Hold Info						
		Pickup at: AG_	ALS-PDC	Comments:				
Items	۲	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

	astronomy		✓ <u>S</u> ear
Index:	Subject		✓ Type:-
Library:	ALL		✓ ○ <u>Ker</u>
Current:			⊙ <u>B</u> ro
BROWSE	Subject astronomy, ALL		
Subject			Heading Occurrence
By Astron	omy		610
🐼 Astr	onomy		
By Astron	omyAmateurs' manual.		1
	omyAmateurs' manuals.		63
	omyAmateurs' manualsJuvenile literature.		1
	omy, Ancient.		15
	omy, AncientJuvenile literature.		3
	onomyAndes Region		
	onomy as a profession		1
	omy, Assyro-Babylonian. onomyAtlases		1
	omyAutases omyAudio-visual material, Children's.		1
	omyCaricatures and cartoons.		1
	nomy Control Amorico		•
Records [	Der cription Call Number/Item		
	ibject astronomy, ALL: 601 records		
EXACT St		Author	Pub. Ye
Title			JE ub. re
Title	space Q & A	Goldsmith, Mike, Dr.	2011
Title Amazing s	space Q & A why stars twinkle : and other questions about sp	Goldsmith, Mike, Dr.	2011 2011
Title Amazing s I wonder v		Goldsmith, Mike, Dr.	2011
Title Amazing s I wonder v How the u Why do st	why stars twinkle : and other questions about sp iniverse works [videorecording] ars twinkle? : all about space	Goldsmith, Mike, Dr. Stott, Carole. Gaiam Americas, Inc. McMahon, Michael, 1942-	2011 2011 2011 2011 2010
Title Amazing s I wonder v How the u Why do st One millio	why stars twinkle : and other questions about sp iniverse works [videorecording] ars twinkle? : all about space on things. Space	Goldsmith, Mike, Dr. Stott, Carole. Gaiam Americas, Inc. McMahon, Michael, 1942- Stott, Carole.	2011 2011 2011 2010 2010 2010
Title Amazing s I wonder v How the u Why do st One millio The practi	why stars twinkle ; and other questions about sp iniverse works [videorecording] ars twinkle? ; all about space n things. Space cal astronomer	Goldsmith, Mike, Dr. Stott, Carole. Galam Americas, Inc. McMahon, Michael, 1942- Stott, Carole. Gater, Will.	2011 2011 2011 2010 2010 2010
Title Amazing s I wonder w How the u Why do st One millio The practi The magin	why stars twinkle ; and other questions about sp iniverse works [videorecording] ars twinkle? : all about space in things. Space cal astronomer c school bus [electronic resource]	Goldsmith, Mike, Dr. Stott, Carole, Galam Americas, Inc. McMahon, Michael, 1942- Stott, Carole, Gater, Will, Cole, Joanna.	2011 2011 2011 2010 2010 2010 2010
Title Amazing s I wonder v How the u Why do st One millio The practi The magin Space my	why stars twinkle : and other questions about sp niverse works [videorecording] ars twinkle? : all about space on things. Space call astronomer c school bus [electronic resource] steries revealed	Goldsmith, Mike, Dr. Stott, Carole, Galam Americas, Inc. McMahon, Michael, 1942- Stott, Carole. Gater, Will. Cole, Joanna. Bow, James.	2011 2011 2011 2010 2010 2010 2010 2010
Title Amazing s I wonder v How the u Why do st One millio The practi The magin Space my Astronom	why stars twinkle : and other questions about sp niverse works [videorecording] ars twinkle? : all about space cal astronomer s school bus [electronic resource] steries revealed ical observations : astronomy and the study of	Goldsmith, Mike, Dr. Stott, Carole. Gaiam Americas, Inc. McMahon, Michael, 1942- Stott, Carole. Gater, Will. Cole, Joanna. Bow, James. Gregersen, Erik.	2011 2011 2011 2010 2010 2010 2010 2010
Title Amazing s I wonder v How the u Why do st One millio The practi The magin Space my Astronom First ency	why stars twinkle : and other questions about sp niverse works [videorecording] ars twinkle? : all about space on things. Space call astronomer c school bus [electronic resource] steries revealed	Goldsmith, Mike, Dr. Stott, Carole. Galam Americas, Inc. McMahon, Michael, 1942- Stott, Carole. Gater, Will. Cole, Joanna. Bow, James. Gregersen, Erik. Dowswell, Paul.	2011 2011 2011 2010 2010 2010 2010 2010
Title Amazing I I wonder v How the u Why do st One millio The practi The magie Space my Astronom First ency Space	why stars twinkle : and other questions about sp niverse works [videorecording] ars twinkle? : all about space cal astronomer s school bus [electronic resource] steries revealed ical observations : astronomy and the study of	Goldsmith, Mike, Dr. Stott, Carole, Galam Americas, Inc. McMahon, Michael, 1942- Stott, Carole, Gater, Will. Cole, Joanna. Bow, James. Gregersen, Erik. Dowswell, Paul. Willett, Edward, 1959-	2011 2011 2011 2010 2010 2010 2010 2010

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.

	rch Hold : Item Search					-	
<b>/</b> *  **	= =>						
Search for:	astronomy				*	Searc	ch
Index:	Subject				*	Type:	
Library:	ALL				~	◯ Key	word
_ionary.						Brov	
Du <u>r</u> rent:						O Exa	
BROWSES	Subject astronomy, ALL						
Subject					Heading O	ccurrences	s
Astron	omv				610		
Astro							
	omyAmateurs' manual.				1		
	omyAmateurs' manuals.				63		
	omvAmateurs' manualsJuvenile literature.				1		
Astron	omy, Ancient.				15		
	omy, AncientJuvenile literature.				3		
Astro	nomyAndes Region						
- Astro	onomy as a profession						
Astron	omy, Assyro-Babylonian.				1		
Astro	onomyAtlases						
Sy Astron	omyAudio-visual material, Children's.				1		
Sy Astron	omyCaricatures and cartoons.				1		
Set Actor	Domy Control America						~
Records	Description Call Number/Item						
⊒ 🗐 The I	practical astronomer - Gater Mill.	~	Price:	\$19.95	Item type	a.	BO
	20 GAT - AP ALPHAPK		Home location:	NONFICTION		location:	
	A12602834484 - 1 - BOOK - NONFICTION		Item category 1:	NONFICTION		egory 2:	
	20 GAT - I3_IP-ROAN		Date created:	7/26/2010	Media de		nor
	A65502058422 - 1 - BOOK - NONFICTION		Date last charged:			s user ID:	
	22 GAT - MACOMB-PLD		Last discharged:				12/
	A37200844021 - 1 - NEW-BOOK - NEW-NF		Date inventoried:			eckouts:	
	20 GAT - P0 MAIN-ST		Times inventoried		In-house		0
	A13215140989 - 1 - BOOK - NONFICTION		rimes inventorieu.	0	minouse	, uses.	•
	20 GAT - P1 LVIEW						
	A13215140905 - 1 - BOOK - NONFICTION						
	20 GAT - P2 LINCOLN						
	A13214643065 - 1 - BOOK - NONFICTION						
🖨 🏨 5	20 GAT - P3_MCLURE						
	A13215140947 - 1 - BOOK - NONFICTION						
i n <mark>il</mark> n 5	20 GAT - PR NORTH	×	<				
	Add Ite	ems to Ite	m List Cancel				

- 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.

lace Reseau	rch Hold : Item Search					-	L ×
A 🕅 +							
Search for:	astronomy				*	Searc	:h
Index:	Subject				*	Type:	_
Library:	ALL				~	◯ <u>K</u> ey	word
							vse
Current:						◯ <u>E</u> xad	ct
BROWSES	Subject astronomy, ALL						
Subject					Heading Oc	currences	5
S Astrono	omy				610		
Mastro Astro	pnomy						
	omyAmateurs' manual.				1		
	omyAmateurs' manuals.				63		
	omyAmateurs' manualsJuvenile literature.				1		
	omy, Ancient.				15		
	omy, AncientJuvenile literature.				3		_
_	onomyAndes Region						
_	phomy as a profession						
	omy, Assyro-Babylonian.				1		
	nomy-Atlases				1		
	omyAudio-visual material, Children's.				1		
	pomy Control America				1		~
Records D	Description Call Number/Item						
	oractical astronomer - Gater, Will.	^	Price:	\$19.95	Item type		BOOI
	20 GAT - AP_ALPHAPK		Home location:	NONFICTION	Current I	ocation:	NON
	A12602834484 - 1 - BOOK - NONFICTION		Item category 1:	NONFICTION	Item cate		ADUI
	20 GAT - I3_IP-ROAN		Date created:	7/26/2010	Media de		none
	A65502058422 - 1 - BOOK - NONFICTION		Date last charged:		Previous		
	22 GAT - MACOMB-PLD			12/1/2010,13:05			12/1/
	A37200844021 - 1 - NEW-BOOK - NEW-NF	=	Date inventoried:		Total che		-
	20 GAT - P0_MAIN-ST M A13215140989 - 1 - BOOK - NONFICTION		Times inventoried:	0	In-house	uses:	0
	20 GAT - P1 LVIEW						
	A13215140905 - 1 - BOOK - NONFICTION						
	20 GAT - P2 LINCOLN						
	A13214643065 - 1 - BOOK - NONFICTION						
	20 GAT - P3_MCLURE						
	A13215140947 - 1 - BOOK - NONFICTION						
	20 GAT - PR NORTH	×					>
	Add Item	s to Ite	em List ancel				

- 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.

nphony WorkFlows: Place Research Hold

izards Modules P	reference Tools Help				
Cataloging Circu	ulation+ Offline Outreach Reports Requests	Reserves Selection	Serial Control Utility		
Fasks 🛞	Display User × Place Research Hold × Place Research Hold				_
	User Information Name: <u>STARFISH, PATRICK</u> Profile name: LIBRARYUSE User categories: <u>Y</u> Group ID: 2014	Status:DELINAmount owed:\$9.00Overdues:0Privilege expires: NEVE	NQUENT Library: Available ho R	AG_ALS-PDC lds:0	Previous II Active IDs:
old	Item information				
User Holds Holds for User 9 User Hold Title Holds Item Holds	Identify User User ID: D150098765			Street: City, state: Zip: Phone:	4819 SANDY L BOTTOM OF TI 98765 309-123-4567
Holds for Item ∋ Item Hold	Identify item				
ilds tesearch Hold Items	Blanket Hold Info: Blanket ID: NEW Copies r Level: COPY Range: Hold Info Pickup at: AG_ALS-PDC	needed: 8 SYSTEM	Expires: 08/17/2017 Recall status: NO		
Items 🛞	List of Holds	comments.			
	Place Hold	Title Get User Add to Informatio List	Item ID Pace Blanket Hold for A	Place Hold Another User (b)	r (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.

nphony WorkFlows: Place Research Hold

izards	Modules Pre	erence Tools Help							
s   Cata	aloging Circula	tion+ Offline Outreach	Reports Requests	s   Reserves   Sele	ction Serial (	Control Utility			
⊺asks	®	Display User × Place   Place Research Hold							
			RFISH, PATRICK	Status:	DELINQUEN	IT Libra	ary:	AG_ALS-PDC	
	8	Profile name: LIBF	RARYUSE	Amount owed:	\$9.00	Avai	lable holds:	0	Prev
	۲	User categories: Y		Overdues:	0				Activ
	Ŵ	Group ID: 2014	1	Privilege expires	NEVER				
old		Item information							
User Ho	olds	Identify User							
lolds for	r User							Street	: 4819 SA
e User ⊢	lold	U ID: D15000705							tate: BOTTOM
Title Ho	lds	User ID: D150098765	•					Zip:	98765
ltem Ho	olds							Phone	e: 309-123-
lolds for	r Item	Identify item							
e Item H	lold	Item ID:							
lds		Blanket Hold Info:							
≷esearcl	h Hold	Blanket ID: NEW	Copies r	needed: 8	Exp	oires: 08/17	/2017		
Items		Level: COPY	Range:	SYSTEM		all status: NO	2011		
		Hold Info							
	۲		DC:	0					1
Itomo	۲	Pickup at: AG_ALS-P	DC Y	Comments:					
Items	Ŵ	List of Holds							
		Place Hold		Title			Item ID		
				Get User Information	Add to List	ce Blanket Hold		ce Hold her 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.

my WorkFlows: Place Research Hold	99+	
rds Helpers Modules Preference Tools Help		
Dataloging Circulation+ Offline Outreach Reports Requests Re	serves Selection Serial Control Utility	
ks  Place Research Hold × Place Research Hold × Place Research Hold		
Checkin) User Information		
er i la	us: DELINQUENT Library: AC punt owed: \$9.00 Available holds: 0 rdues: 0	ALS-PDC Previous ID: A15009876 Active IDs: A15009876
	ilege expires: NEVER	
er Item information		
and Display		
Status User ID: D150098765		Street:4819 SANDY LANECity, state:BOTTOM OF THE OCE#Zip:98765Phone:309-123-4567
Identify item		
Item ID:		
Blanket Hold Info:		
Blanket ID: NEW Conjes neede	ed:4 Expires: 08/11/2017	
Level: TITLE Range:	SYSTEM Recall status: NO	
Hold Info		
	omments:	
Is for User		
Hold Ust of Holds	Title Item	ID Comments
	American eclipse : a nation's epic race to catch A221	
n Holds	Exploring the mysteries of the universe A130	02155070
is for Item	National Geographic pocket guide to the night A367	01060772
	The glass universe : how the ladies of the Harv A355	
arch Hald		00626512 80795085
sarch Hold	Get User Add D Place Blanket Hold	Place Hold or Another User (b) Clear (g) Close

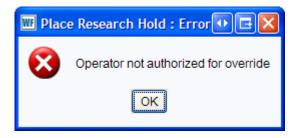
22. After selecting the number of titles needed, click the "Place Blanket Hold" button on the bottom of the "Place Research Hold" screen. This is when the holds are placed.

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.

🔟 Place Research Hold : No Hold Allowed Ov 🕞 🖾
Hold not allowed
520 CHA A24100128556 Astronomy : a beginner's guide to the universe Chaisson, Eric.
No hold allowed override:
Override & Place Hold Do Not Place Hold

23. Click the "Do Not Place Hold" button.

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



🔟 Complete 🛛 💽	
8 Item(s) Selected	
6 Hold(s) Placed	
Place Hold for Another User	
Review Holds	
Place Another Hold for This Use	r
Close	

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 <u>rsahelp@railslibraries.info</u> or RSA staff at 866-940-4083.