

## Placing Book Club/Classroom or Research Holds Cheat Sheet

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To request books for Book Club/Classroom:

1. Open the Holds group in the Circulation Module
2. Open the Place Research Hold wizard.
3. Enter the user ID.
4. In the Blanket Hold Info pop up box:
  - a. Enter the number of copies needed
  - b. Enter the expiration date ( The date items are no longer needed)
  - c. Under Level/Range select the Copy radio button as the Level
  - d. Click the OK button
5. Click on the Item Search helper at the top of the screen. (Book with magnifier)
6. In the Item Search box, search for the title.
7. Highlight an item ID and click on “Add items to the item list” button on the bottom of the Item Search box.
8. After the item Search box closes, click on the “Add to List” button on the bottom of the Place Research Hold screen. The title and item ID will appear in the List of Holds box.
9. Repeat steps 7 and 8 selecting more items then you actually need. Example: if you need 9 books select 12.
10. After you have selected all the items you want, click on the “Place Blanket Hold” button on the bottom of the screen.
11. If an item you selected is not available to fill the hold, a Hold not allowed box will appear. Click on the “Do Not Place Hold” button.
12. After number of copies needed have been received or placed intransit, the extra holds will drop off and the patron will not receive any other items to fill the hold. Example: patron needs 3 books, you request 6, after the first 3 arrive the next three will be canceled.

**IMPORTANT:** If you do not change the Level option in step 4C above, you will only receive one item for the holds you place. You will never get multiple items for this request.

To request Research Holds:

A research hold is used to fill a request for multiple titles for one patron. Example: you have a patron who is researching wind turbines. They want 3 books, they don't care which 3 books they receive.

You will use the Place Research Hold wizard.

1. Open the Holds group in the Circulation Module
2. Open the Place Research Hold wizard.
3. Enter the user ID.
4. In the Blanket Hold Info pop up box:
  - a. Enter the number of copies needed
  - b. Enter the expiration date
  - c. Under Level/Range select the Title radio button as the Level
  - d. Click the OK button
5. Click on the Item Search helper at the top of the screen. (Book with magnifier)
6. In Item Search box, search for the subject.
7. When you find a title, highlight an item ID and click on "Add items to item list" button on the bottom of the Item Search box.
8. After the item Search box closes, click on the "Add to List" button on the bottom of the Place Research Hold screen. The title and item ID will appear in the List of Holds box.
9. Search for a different title on the subject and repeat steps 7 and 8 selecting more titles than you actually need. Example: if you need 3 books select 5 or 6.
10. After you have selected all the items you want, click on the "Place Blanket Hold" button on the bottom of the screen.
11. If an item you selected is not available to fill the hold, a Hold not allowed box will appear. Click on the Do No Place Hold button.
12. After number of copies needed have been received or placed intransit, the extra holds will drop off and the patron will not receive any other items to fill the hold. Example: patron needs 3 books, you request 6, after the first 3 arrive the next three will be canceled.

Some reasons holds may not be allowed

- The item has an item type that does not allow holds. Most item types with the word New do not allow holds
- The library is a Union List library. Union list libraries location on all items is OSTACK. Items from Union List libraries must be requested via fax or OCLC WorldShare.
- School libraries have been configured to only place holds on other school libraries' items and public have been configured to only place holds on other public libraries' items. Let Kendal know if your library is willing to accept holds from all types of libraries. He will need to change a parameter.

Questions ?? Contact the RSA help desk at [rsahelp@railslibraries.info](mailto:rsahelp@railslibraries.info) or RSA staff at 866-940-4083.