

#### Placing Book Club, Classroom or Research Holds Guide

#### Last updated: December 2, 2024

#### Placing Book Club or Classroom Holds

Book Club/Classroom/Research/Blanket Holds are interchangeable terms that refer to holds that are placed when a user (teacher, patron, or book club account) needs multiple copies of the same title, or multiple items on a research topic but on one hold record.

Advantages:

- It's easier to place multiple holds on one book club account than on many user's accounts.
- It's easy to return to the topic/title search.
- Holds expire on the date you specify, so they aren't transiting after the item was needed.

<u>Use when</u>:

• You need to place holds on multiple copies of the same title. You are not limited to placing the hold on one title record or format. You can place the blanket hold on book, large print, Playaway, CD book, or DVDs items if needed for your book club.

-or-

• You need several items for a research topic. You can search for a subject, say tornadoes, and easily return to search results to place several items on hold.

Best practice for managing book clubs:

- Use the **BKCLUB-NRC** (book club not recirculating) user profile for book clubs that are managed by the library. Contact RSA to add the profile to your user profile drop down. (We do not recommend using the BOOKCLUB profile as that is recirculating).
- Check out book club items to the individual patrons in the book club, not to the book club account.

There are videos to accompany this guide which can be found here: https://www.youtube.com/watch?v=7fK3qPcgH0Q. https://www.youtube.com/watch?v=yImeJy0u1SI. In the Circulation module, open the "Place Research Hold" wizard in the Holds group.



Enter or scan the user ID in the "User ID" box.

Place Research Hold x	
A L C P A	9
Name:	Status: Library:
Profile name:	Amount owed: Available holds:
User categories: Group ID:	Overdues:
Item information	
Identify User	
User ID: PKDEMO2	Current: PATTY BOOK CLUB, PATRICIA PKDEMO2
Identify item	
Identify item Item ID:	

## The "Place Research Hold" box will open.

Place Research Hold	
Blanket Hold Info:	
Blanket ID: NEW	Copies needed:
Pickup at: AG_ALS-PDC	Expires:
Level/Range	C Recall status
Level: O Copy I Title Range: Library O Group I System	O Allow Recall ③ No Recall O Recall now (RUSH)

Use the following information to fill in the boxes on the "Place Research Hold" pop up box:

### **Blanket Hold 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 especially 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.

Select the "OK" button on the bottom of the "Place Research Hold" pop up box



Select the "Item Search" helper at the top of the screen.



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

The "Place Research Hold: Item Search" pop-up box will appear. Search for the items you need. Use the **browse** search for best results.

By title:

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Research Hold : Item Starch	-
Search for to kill a mockingbird	~ Searc
Tal	Type:
noex: Inte	- Type.
Library All	~ C Reyw
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BROWSE Title to kill a mockingbird. ALL	
754-	U
Inte	Heading Occurrence
By To kill a mocking girl /	2
😰 To kill a mockingbird	66
😰 To kill a mockingbird : a full-length play /	1
B To kill a mockingbird : a graphic novel /	1
😰 To kill a mockingbird : Harper Lee	1
To kill a mockingbird (Lee, Harper) (OCoLC)fst01357783	5
To kill a modelinghird (Mation picture)	3
By To kin a mockingbird (Motion picture)	7
To kill a mockingbird (Motion picture)     To kill a mockingbird (Motion picture)	1
so To kill a mockingbird (Motion picture : 1962)     so To kill a mockingbird (Motion picture : 1962)     so To kill a mockingbird (Motion picture : 1962)	1
To kill a mockingbird (Motion picture : 1962)     To kill a mockingbird (Motion picture : 1962)     To kill a mockingbird (Motion picture : 1962) (OCoLC)fst01401410     To kill a mockingbird : notes /	2
jo To kill a mockingbird (Motion picture : 1962)     jo To kill a mockingbird (Motion picture : 1962)     jo To kill a mockingbird (Motion picture : 1962)     jo To kill a mockingbird : notes /     jo To kill a mockingbird : notes /     jo To kill a mockingbird : notes /	2

## By subject:

	1	1				
Place Research Hold ×						
Research Hold						
Search ton Toroado						<ul> <li>Search</li> </ul>
Index: Subject						↓ Type:
Librosc All						O Keyword
						O Browse
Current:						Event
BROWSE Subject tornado, ALL						
Subject						Heading Occurrences
TornadesSécuritéMesuresOuvrages pour la jeunesse.						1
🕞 Tornado						1
5) Tornado damage.						2
👦 Tornado damageAlabamaTuscaloosa.						1
By Tornado damageFiction.						1
By Tornado damageJuvenile fiction.						1
By Tornado damageKansasGreensburg.						1
By Tornado damageMissouriJoplin.						1
By TornadoFiction.						2
new Tornado hunters						
By Tornado insurance						
Tornado (Jet fighter plane)						
Description Call Number/Item						
B Storm kings : the untold history of America's first tornado chasers - Sandlin, Lee	Price	\$26.95	Item type:	BOOK	Ongoing checkouts: 1	
FONDULAC	Home location:	NONFICTION	Current location:	NONFICTION	Ongoing renewals: 0	
- B NE 551 552 SAN FONDULAC		NONFICTION	can and location.	ADUNT	- Beng renewals.	

Refer to the <u>Item Search Helper Guide</u> for more information on searching.

Highlight the title on the display window.

Select the "Records" tab and highlight the title in the "Records" tab display.



Select the record that best matches the item(s) you want. Look at the carrier type and number of library copies. You will return to this screen to choose more items and to choose items from other records.

Select the "Call Number/Item" tab.



Look at the expanded tree on the Call Number/Item tab for:

- How many libraries own the title?
- How many items have the Item type of N-BK (these books may not be available for a hold)?
- How many public libraries own the title? (While you can place holds on items at some school libraries, not all school libraries share with publics, and they are closed during the summer and during breaks).
- Using the "Research Hold' wizard does not limit holds to just one title record, you can select items from multiple title records.

Highlight an item. Select "Add items to Item List."

Place Researc	ch Hold x			
"A 🛐 🖛 =	•			
Search for:	to kill a mockingbird			
Index:	Title			
Library:	ALL			
Current: BROWSE Ti	tle to kill a mockingbird, ALL			
Title ➡ To kill a ➡ To kill a ➡ To kill a ➡ To kill a	mocking girl / mockingbird mockingbird : a full-length play / mockingbird : a graphic novel /			
	Escription Car Number/Item IC LEE - 12_IP-GTH # A65501790372 - 1 - BOOK - PBK SD (IV / IV2 / IV3 / IV4) LEE - IV3C-MOSVL # A35670038903 - 1 - BOOK - FICTION ALL-PPI (D0_/P1_/P2_/D3_/P7_/P8_) EE - P0_MAIN-ST # A13213626727 - 10 - BOOK - PBK-FIC EE - P1_LVIEW # A13213627105 - 0 - BOOK - PBK-FIC EE - P2_LINCOLN # A13213471457 - 1 - BOOK - MISSING - Can't Circ EE - P3_MCLURE # A13213471122 - 1 - BOOK - LOST-ASSUM SCOT-SD (S5_/S6_) IC LEE - S5_SCOT-HS # A88300029253 - 3 - BOOK - STACKS SD (SC / SC2) LA FIC LEE - SCOUNTY-HS		Price: Home location: Item category 1: Item category 3: Item category 5: Item category 7: Item category 9: Date created: Date last charged: Last discharged: Date inventoried: Times inventoried:	\$6.99 PBK-FIC FICTION BOOK PAPERBACK UNDEFINED 11/21/2007 10/16/2024 10/19/2024,8:52 Never 0
	# A86400038936 - 1 - BOOK - FICTION ALDO-SD	(	Add Items to Iter	n List Gancel

## Select the "Add to List" button on the bottom of the screen.

Pickup at: AG_ALS-PDC		nments:		
	CO			
List of Holds				
Place Hold		Title		Item II
			$\frown$	
		Get User	Add to Place Blanket H	lold

# This will add the item to "List of Holds" display box.

3lanket ID: NEW	Copies needed: 8	Expires: 12/16/2024		
Level: COPY	Range: SYSTEM	Recall status: NO		
Hold Info				
Dickup at: AG_ALS-DDC	Commente			
Fickup at. AO_ALS-FDC	© Comments.			
List of Holds				
List of Holds Place Hold	Title		Item ID	Comments

Select the Item Search Helper again to choose more items. You will return to the Call Number/Item tab you were using.

Place Research Ho	old x			
e Research Hold	~ ~			
ð 💪 🕯 🗶 🕨				
User Informatio	'n			
Name:	PATTY BOOK CLUB, PATRICIA	Status:	ОК	Library: A
Profile name:	BKCLUB-NRC	Amount owed:	\$0.00	Available holds: 0
User categories	:: <u>Y</u>	Overdues:	0	
Group ID:		Privilege expires	s: 10/13/2025	
Item informati	on			
Identify User				
Identify item Item ID:				
Blanket Hold Inf	io:			
Blanket ID: NEW	/ Copies needed	d: 8	Expires: 12/16/2	2024
Level: COP	Y Range:	SYSTEM	Recall status: NO	
Hold Info				
Pickup at: AG_A	ALS-PDC 🗸	Comments:		
List of Holds				
Place Hold		Title		Ite

Highlight another item on the same Call Number/Item tab or select a different item from another bibliographic record and use the "Add Items to Item List' button and then the

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Place Rese	arch Hold ×			Place Research Hold	x			
Mille Research Hold				A Research Hold				
A I Research Hold :	nem Search				8 19			
*n 199 i	-			User Information				
Search for:	813.54 LEE			Name: P		Statue	or	Librang
Index:	Call Number			Profile name: B	KCITIB-NRC	Amount owed:	\$0.00	Available holds:
Library:	ALL			User categories: Y	KCLUD-NIKC	Overdues:	0	Available fibius.
Current:	To kill a mockingbird 813.54 LEE ID:A34100391865			Group ID:		Privilege expires	s: 10/13/2025	
EXACT Iter	m ID A34100391865. CMBBIDGE: 1 record			To kill a mockingbi	rd / Lee. Harper, author.			
Title		Author		813.54 LEE Copy:	1 ID:A34100391865			
To kill a m	ockingbird	Lee, Harper, author.		Identify User				
= (1) =	BPCCUSD BPCCUSD # A36970348767 - 1 - BOOK - STACKS # A36970389331 - 2 - BOOK - STACKS BBIOGE B13.54 LEE - CMBRIDGE	Price: Home location: Item category 1 Item category Item category Item category 1	59.99 NONFICTION L: FICTION B: BOOK 5: PAPERBACK 7: UNDEFINED D: UNDEFINED	Identify item Item ID: A3410039 Blanket Hold Info: Blanket ID: NEW I evel: COPY	11865 Copies needed Bange:	:8 SYSTEM	Expires: 12/16/2 Recall status: NO	2024
⊡ DA	NVERS-TL	Date created: Date last charg	s/28/2019 ed: 2/10/2023	Hold Info				
8-1	MA31300109838 - 1 - BOOK - CLASSICS	Last discharged Date inventorie	l: 2/23/2023,15: d: Never	Pickup at: AG_ALS	-PDC 🗸	Comments:		
e 🏦 EU	REKA-PLD	Times inventor	ied: <sup>0</sup>	List of Holds				
E. 170	# 466201115901 - 1 - BOOK - FICTION			Disco Hald		Tisle		
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- <b>a</b> - <b>a</b> - <b>a</b>	CIC/PBK LEE, HARPER - GU_GBURGPL MA21905874760 - 1 - BOOK-PBK - LOST-ASSUM LHAPEINE Y LEE - HN_HAPEINE MAGEODOLOGEA 1 BOOK SEEC VALUE				•	TO KIII a MOCI	kingoird	A
-		Add Items t	to Item List Dancel			Get	t Use Add to matio List	lace Blanket Hold

"Add to list" button.

Repeat these steps until you have selected MORE than the number of copies needed (to account for non-holdable items).

User ID: PKDEMO2			
Identify item			
Item ID:			
Blanket Hold Info:			
Blanket ID: NEW	Copies needed: 8	Expires: 12/16/20	024
Level: COPY	Range: SYSTEM	Recall status: NO	
Hold Info			
Pickup at: AG_ALS-PDC	~ Comments:		
List of Holds			
Place Hold	Title		Item ID
	To kill a	mockingbird	A86486145680
	To kill a	mockingbird	A36900513431
	To kill a	mockingbird	A35520541785
	To kill a	mockingbird	A13002319925
	To kill a	mockingbird	A12007724866
	To kill a	mockingbird	A12007724858
	To kill a	mockingbird	A85400604541
0	To kill a	Get User Add to P Information	A85400604541 Place Blanket Hold for Another User (

After selecting the items needed, select "Place Blanket Hold."

(	Place Research Hold : No Hold Allowed Override			
Je	Hold not allowed			
ìI	FIC/PBK LEE, HARPER Copy: 1	WF Plac	e Research Hold : Error	×
It	A21905874760		On another met authorit	ad for accorde
le	l o kill a mockingbird Lee Harper author		Operator not authoriz	led for override
s	No hold allowed override:		ОК	
	Override & Place Hold Do Not Place Hold			

If you get "Hold not allowed" the regular override will not work. This item will not be able to fill the blanket hold. Select "Do Not Place Hold."

Once the holdable items have been selected you will get the "Complete" pop-up message:

WF Complete ×
15 Item(s) Selected
12 Hold(s) Placed
Place Hold for Another User
Review Holds
Place Another Hold for This User
Close

Once the number of requested items has filled the blanket hold (in this example 8 items), the blanket hold will be fulfilled, and no more items will transit to fill the blanket hold.

Contact the RSA Help Desk at help@rsanfp.org or RSA staff at 866- 940-4083.