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.

Use when:
- 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.

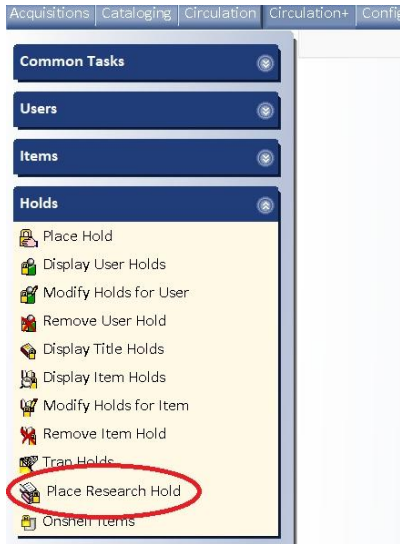Best practice for managing book clubs:
- Use the **BKCLUB-NRC** (book club not recirculating) user profile for book clubs that are managed by the library. Contact RSA to add the profile to your user profile drop down. (We do not recommend using the BOOKCLUB profile as that is recirculating).
- Check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

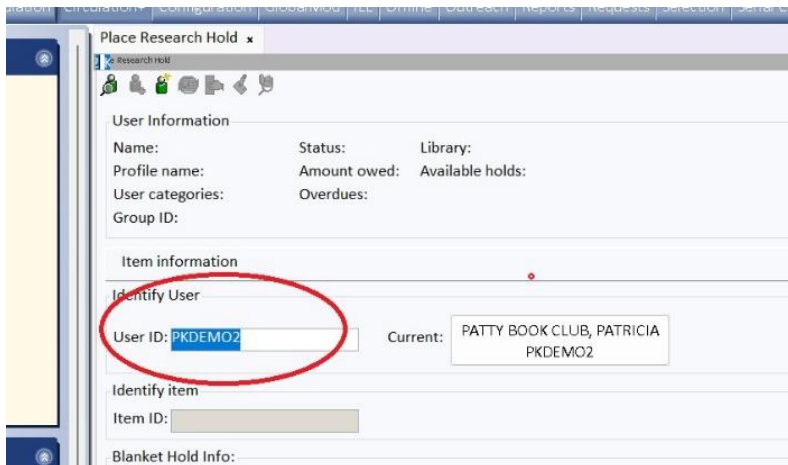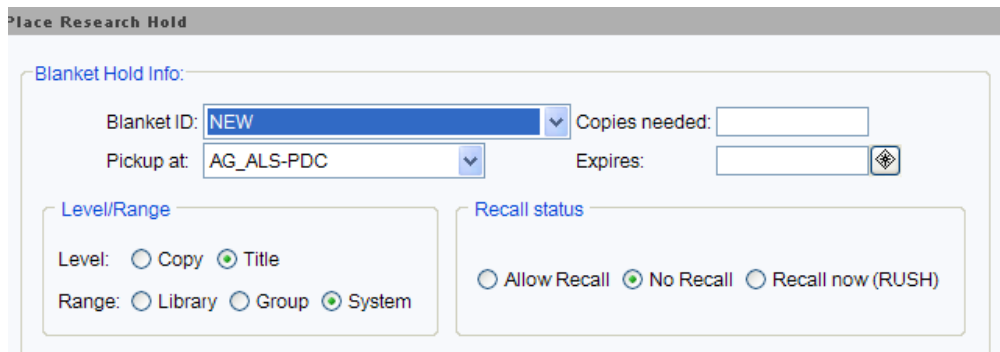There are videos to accompany this guide which can be found here:
https://www.youtube.com/watch?v=7fK3qPcgH0Q.
https://www.youtube.com/watch?v=yImeJy0u1SI.

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.

The "Place Research Hold" box will open.

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
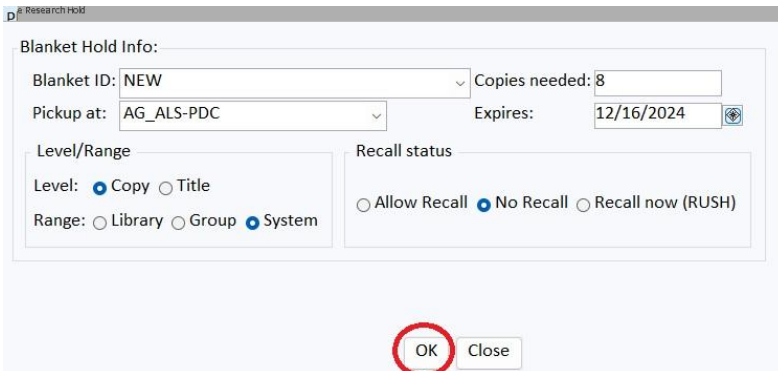
Select the "Item Search" helper at the top of the screen.
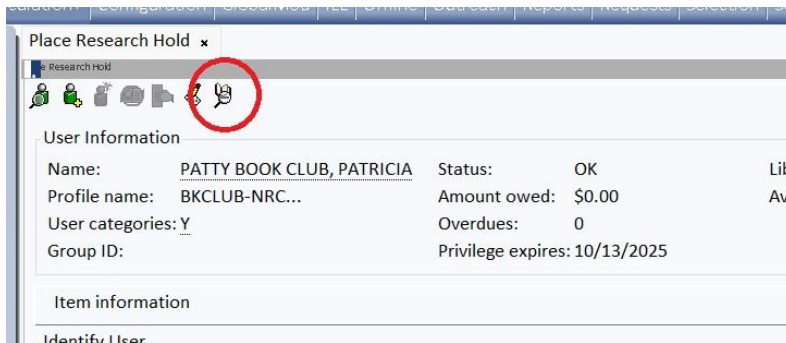
You will now begin searching for copies of the title in WorkFlows.

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:
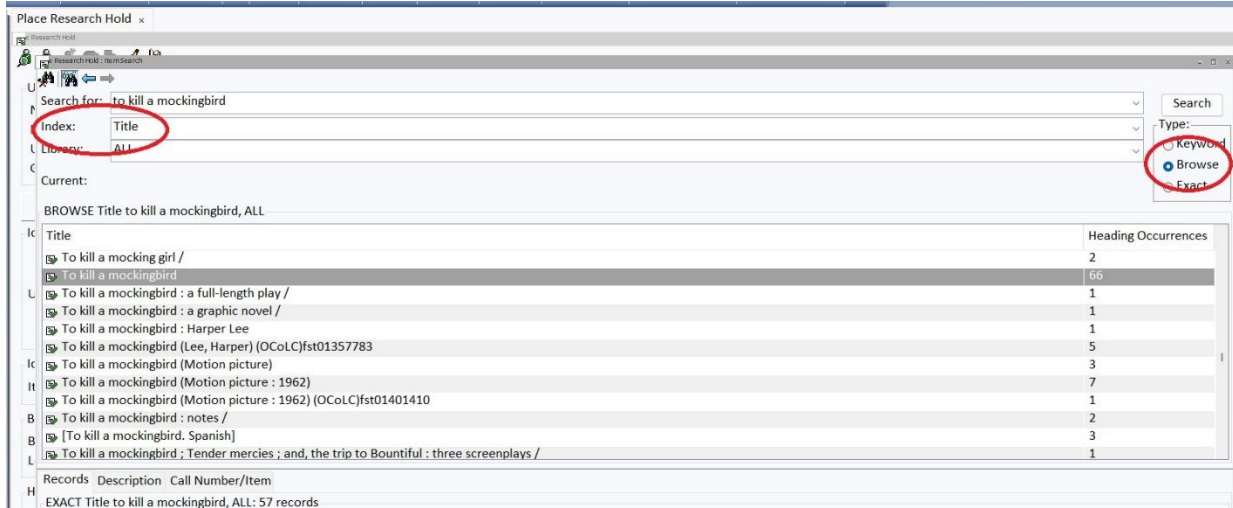
By subject:
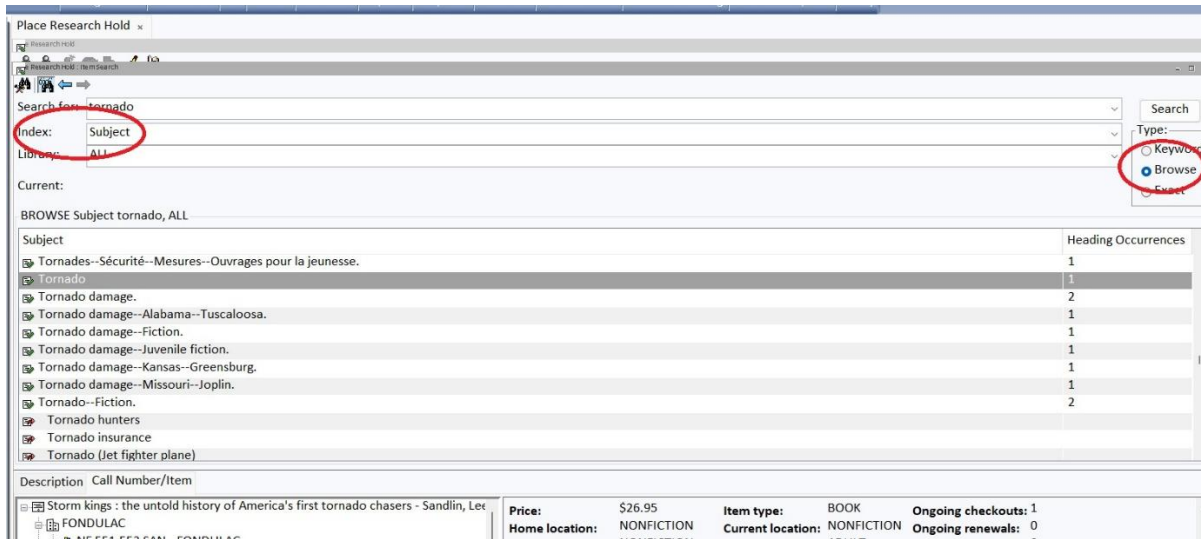
Refer to the [Item Search Helper Guide](#) for more information on searching.

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."

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

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

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

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
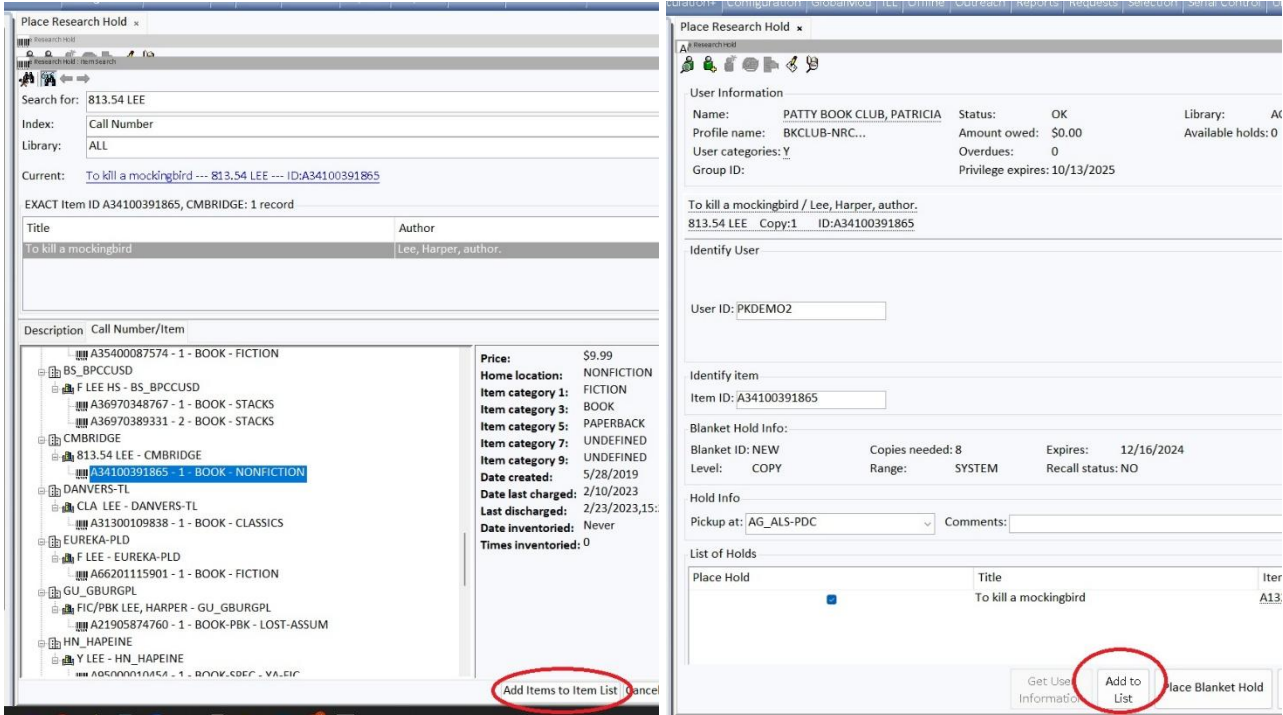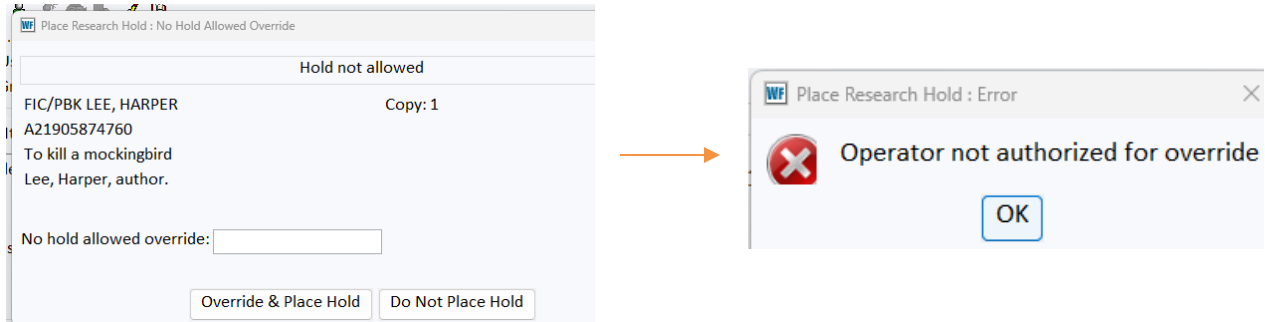

"Add to list" button.

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

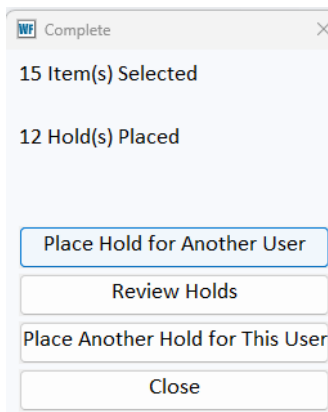After selecting the items needed, select "Place Blanket Hold."
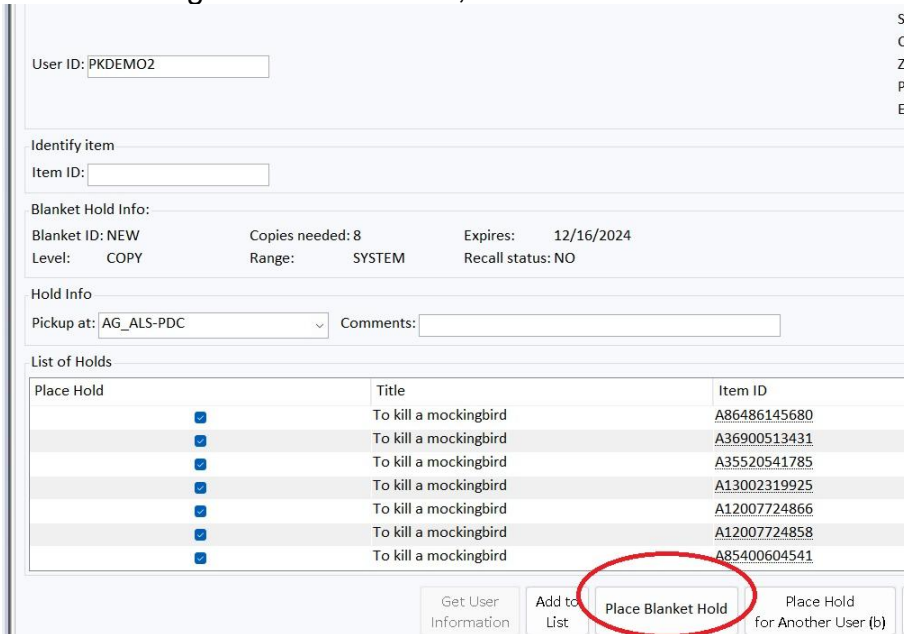
If you get "Hold not allowed" the regular override will not work. This item will not be able to fill the blanket hold. Select "Do Not Place Hold."

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

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.