

Resource Sharing Alliance 715 Sabrina Drive East Peoria, IL 61611 866-940-4083

## **Placing Holds Guide**

# Last updated April 11, 2025

There is a video to accompany this Guide: https://www.youtube.com/watch?v=2NHSiPzhUvg.

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#### **Related documents**

How Holds Work Guide Processing Holds Guide <u>RSA Reciprocity Policy</u> <u>Printed Documents Including Patron PII</u> Why didn't my item fill my patron's hold? A Guide

## Notes:

- RSA member libraries cannot place a system-wide hold for non-RSA member libraries. i.e., an RSA member public library cannot place a hold for the local non-RSA school library.
- Do not delete a hold without the patron's permission or without informing the patron's home library.

#### **Important Terminology**

**Title Level Hold**: Any holdable item on a bib record can fill the hold. **Copy Level Hold**: Only the selected Item ID will fill the hold. **System-wide hold**: A hold on all holdable items from any library can fill the hold

## Search for the Item

Placing a hold starts with searching for the item requested.

Use Circulation+>Common Tasks>Item Search and Display to search for the item requested by the patron. If the search defaults to your library and you don't have the item, or need a different format, change the search library to ALL. See **Item Search and Display Guide [link]** for details on searching in Workflows.

SirsiDynic Symphony WorkFlows: Item :	Search and Display			-	o x
File Edit Wizards Helpers Mo	iodules Preference Tools Help				RSA
Acquisitions Cataloging Circu	ulation Circulation+ Configuration GlobalMod  ILL Offlin	ne Outreach Reports Requests Selection S	erial Control   UnionIist Catalog   UnionIist Reports   Utili	ty	
Common Tasks	Item Search and Display x     Issantiant Dayley				
CheckOut	-+AMAR				
(A) Discharge (Checkin)	Author:	AND	V Title:	AND ~	Search
G Fine Free Discharge	Series:	AND	Subject:	AND	Reset
B Discharging Bookdrop	General:	AND	v Periodical Title:		
Benew User	Library: ALL			~	
Renew Item	Current: Finding Dorothy : a novel FIC LET	ID:33441006776014			
🞒 Billing a User					
Paving Bills					
B Item Search and Display					
Check Item Status					
🖬 Help					
a Print					

Once the item is found in Item Search and Display **choose Detailed Display** to make the item the current item.

File Edit Wizards Helpers Mo	dules Pref	erence Tools Help									RSA
Acquisitions   Cataloging   Circu	lation Circ	ulation+ Configuration GlobalMod ILL Offlin	e Outreach Reports Reques	ts Selection S	erial Control   Un	ionlist Cat	alog Unionlist Reports	Utility			
State of the second	_	Item Search and Display *									
Common Tasks	۲	Isanthant Digity									
2 CheckOut					1						
😫 Discharge (Checkin)		Author: patterson		AND	Title:	rose			AND	~	Search
😋 Fine Free Discharge		Series:		AND	<ul> <li>Subject:</li> </ul>				AND	×	Reset
P Discharging Bookdrop		General:		AND	<ul> <li>Periodical Titl</li> </ul>	le:					
( Renew User		Library: ALL								~	
Renew Item		Current:									
👔 Billing a User		ADVANCED SEARCH KEYWORD Author PATTER	SON, AND Title ROSE, ALL: 8 re	cords							
Paying Bills		Title	Author				Carrier Type		Pub. Year	Librar	y Copies
B Item Search and Display		Kun, Kose, run : a novei	Parton, Dolly, at	unor, narrator.			audio disc		2022	22	
Check Item Status		Run Rose run	Parton Dolly a	dbor.			volume		2022	1113	
Help		Hill screet bloes. The complete series	Charlenster, Roberts J. Bass			_	videodisc		2014	1	
# Print		Dimanche and other stories	Némirovsky, Irè	ne, 1903-1942.			volume		2010	1	
		Whiskey in the jar [sound recording] : essentia	l Irish drinki						2006	1	
Users	۲	Description Call Number/Item									
Items		A32200617830 - 1 - BOOK - FICTIO	N	Price:	\$30.0	00	Item type: BOO	Ongoing checkouts: 1	2		
	_	B A F PARTON - AP_ALPHAPK		Home	terony 1: FICTI	ION	Current location: FICI	UT Checkouts to date: 0			
Holds	۲	13602945014 1 POOK CHEC	CODUT - Can't Circ	, Item ca	tegory 3: BOO	к	Item category 4: THR	ILLER Renewals to date: 0			
		A12603845022 - 2 - BOOK - FICTIO	DN	Item ca	tegory 5: MUS	ICSUB	Item category 6: UNI	DEFINED Date last cleared: 1/	/2/2025		
Special	۲	A M PAR - AYER-PLD	_	item ca	tegory 7: UND	EFINED	Item category 8: UNI	DEFINED			
In-Transit Items		A36505597452 - 1 - BOOK - FICTIO	DN .	Date cr	eated: 3/15	/2022	Media desk: non	e			
In transic items	•	⇒ ⊕ B0_BROWN-C		Date la	t charged: 8/17	/2023	Previous user ID: D08	0888543			
		PAT - 80_BROWN-C		Last dis	charged: 9/6/2	2023,23:59	Last activity: 9/6/	2023			
		BEARD-H-ML		Date in	ventoried: Neve	Hr.	Total checkouts: 14				
		FIC PAR - BEARD-H-ML		Times	iventoned: •		In-house uses:				
		A33900743507 - 1 - BOOK - FICTIO	N								
		BLAND-HIRE									
		A36800505241 - 1 - BOOK - STAC	s								
		BMFIELDPLD				-					
		- FAIT REPERSON		- 1	Detailed Display	Close					
1					octaneo Dispia	crose					

Detailed Display shows all items on the title record under the Call Number/Item tab, including details about each item. **The item is now the "current item."** 

SirsiDynix Symphony WorkFlows: Item Search and Display						- 0 X
File Edit Wizards Helpers Modules Preference Tools Help						RSA .
Acquisitions Cataloging Circulation Circulation+ Configuration	GlobalMod ILL Offline Outreach Reports Requests Selection Serial	Contr	rol   Unionlist Catalog   I	Unionlist Reports Utility		
Common Tasks	lay x	_				
D. Diseberra (Chashin)	rton. Dolly, author.					
Discharge (checkin)						
Discharging Bookdron	ic MARC Holdings Call Number/item Bound-with Orders Serials Ctrl Selec	tions				
		It	em Info Circ Info Bills	Checkouts Holds		
	845014 - 1 - BOOK - CHECKEDOUT - Can't Circ		Call number information	on		
A12603	845022 - 2 - BOOK - FICTION		Call number:	F PARTON	Class scheme:	DEWEY
AYER-PLD	YFR-PLD		Call library:			
Dalitam Search and Display	597452 - 1 - BOOK - FICTION		,			
B0_BROWN	c		Shadow call number	N		
Check Item Status	BROWN-C		Itom information			
En BEARD-H-M	545057 - 1 - BOOK - FICTION		item mormation			
A Print Bric PAR -	BEARD-H-ML		Item ID:	A12603845022	Copy number:	2
Users	743507 - 1 - BOOK - FICTION		Type:	BOOK	Item library:	AP_ALPHAPK
BIC PAT/P	AR - BLAND-HIRE		U.S. Isaatiaa		Comment la continue	
Items 🛞 Litems A36800	505241 - 1 - BOOK - STACKS		HOME IOCATION:	FICTION	Current location:	FICTION
Holds Date created:	3/15/2022		Item cat1:	FICTION	Item cat2:	ADULT
Date last charged: Date due:	none		Item cat3:	BOOK	Item cat4:	THRILLER
Special 🛞 Last discharged:	9/6/2023,23:59					
Date inventoried:	Never D		Item cat5:	MUSICSUB	Item cat6:	UNDEFINED
Previous user ID:	D080888543		Item cat7:	UNDEFINED	Item cat8:	UNDEFINED
Last activity:	9/6/2023					
In-house uses:	0		Item cat9:	UNDEFINED	Item cat10:	UNDEFINED
			Media desk:		Number of pieces:	1
			Tatalaharan		Delana	
			rotal charges:	14	Price:	\$30.00
			Permanent	Y	Circulate	Y
	Return to Sea	arch	Display Holdings Close			

# <u> Place Hold</u>

• In Circulation+>Holds Group choose Place Hold



• Scan the User Id or use the User Search helper *b* to search for the user. If using the helper, verify that it's the correct patron.

	The second se	
Hie Edit Wizards Helpers Modules	Preterence Tools Help	
Acquisitions Cataloging Circulation	Circulation+ Configuration GlobalMod ILL Offline Outreach Re	teports Requests Selection Serial Control Unionlist Catalog Unionlist Reports Utility
	Item Search and Display x Place Hold x	
Common Tasks	8 <b>1</b>	
	(♪) <sup>(</sup> , <sup>(</sup> ) <sup>(</sup> ) <sup>(</sup> <sup>(</sup> ) <sup>(</sup> ) <sup>(</sup> ) <sup>(</sup> <sup>(</sup> ) <sup>(</sup> )	
Users -	User Information	
Items	Name: Status: Library:	
	Profile name: Amount owed: Available holds:	6
Holds	User categories: Overdues:	
Place Hold	Group ID:	
R Dieplay Liser Holds	Item information	
Modify Holds for Licer	Identifie User	
Remove Lear Held		
Remove User Hold	User ID:	
Se Display litle Holds	Taenary tem	
B Display Item Holds	Run, Rose	e. run
Modify Holds for Item	Item ID: Current: F PARTO	FON I I I I I I I I I I I I I I I I I I I
🙀 Remove Item Hold	A1260384.	45022
🕰 Trap Holds	Hold Info	
Place Research Hold	Pickup at: MP_MORTON	Evoires:
🛱 Onshelf Items	Comments:	w w
	Date suspended:	Date unsuspended:
Special		Pocal status
		necali status
In-Transit items	Level: Copy O litle	○ Allow Recall
	Range: 🔿 Library 🔿 Group 🧿 System	

Note that the item that was just searched is the Current item. Click on the current item to enter it in the Item ID box. This item is a <u>placeholder for any holdable item</u> on the record when placing a Title Hold. This is not necessarily the item that will fill the hold.

A 20 10 m	B / 19								
	a s a								
ser Informatio	n								
lame:	KWERAM, patty	Status:	DELINQUENT	Library:	AG_ALS-	PDC			
rofile name:	ADULT	Amount owed:	\$2.00	Available holds:	:0				ATTY'S DEMO ACCOUNT
lser categories	i: Y	Overdues:	0						INTE: PATTY S DEMO ACCOUNT.
roup ID:	2037	Privilege expires:	12/31/2026						
tem informati	on								
entify User									
							St	reet:	715 SABRINA LN
							Ci	ty, state:	EAST PEORIA IL
ser ID: PKDEM	01						Zi	p:	61611
							P	none:	866-940-4083*
							E	nail:	patty.kweram@railslibraries.org
em ID:		Currei t:	Run, Rose, run F PARTON		1				
old Info									
ckup at:	MP MORTON			Expires:	11/18/	2025 🔹			
omments						( <b>1</b> )			
ate suspended		4		Date unsuspander	d:				
ate suspended		4		Date unsuspender					
Level/Range						Recall status			
Level: O Cop	y o Title								
						<ul> <li>Allow Reca</li> </ul>	all 🗿 No Recall 🔿 F	Recall no	w (RUSH)

## Verify the information

Confirm the patron's contact information. If they have an email, they will get an email when the hold is available. If there is no email, they will need a phone call. Confirm the pickup library, which defaults to your library or their home library, depending on settings.

ser Information			
Name: KWERAM, patty Profile name: ADULT User categories: Y Group ID: 2037	Status:DELINQUENTAmount owed:\$2.00Overdues:0Privilege expires:12/31/2026	Library: AG_ALS-PDC Available holds: 0	Note: PATTY'S DEMO ACCOUNT.
un, Rose, run / Parton, Dolly, auti IC PAR Copy:1 ID:A3670114	hor. 3774		
dentify User Jser ID: <mark>PKDEMO1</mark>			Street: 715 SABRINA LN City, state: EAST PEORIA IL 7ip: 51511 Phone: 866-940-4083* Email: patty.kweram@railslibraries.org
dentify item tem ID: A36701143774 told lofo		Tuine Tuine	1
Comments: Date suspended:	*	Date unsuspended:	f
Level/Range Level: O Copy O Title Range: O Library O Group O Sy	rstem	Recall status O Allow Reco	all <b>o</b> No Recall <sub>O</sub> Recall now (RUSH)
Make hold first in queue			

This is the date that the hold request will drop out of Workflows if the hold is never filled, usually 300 days from the date the hold is placed. No need to change this date.

Comments:	place at drive up windo	W			
Date suspended:	01/28/2025 🛞		Date unsuspended: 02	2/02/2025	۲

Optionally, you may enter a comment and/or suspension dates (so they won't lose their place on the hold list should it be ready when they aren't able to pick up the hold). You can suspend a hold in Workflows after it has been placed, or the patron can suspend the hold in RSAcat.

Level/Range	Recall status
Level: Ocopy Title Range: Library Oroup System	⊖ Allow Recall <b>○</b> No Recall ⊖ Recall now (RUSH)

Make hold first in queue

The above defaults should only be changed under special circumstances.

#### Level:

A TITLE LEVEL HOLD means that any holdable item on the record can fill the hold. The Item ID is only a placeholder for any item on that record.

A COPY LEVEL HOLD means that only the item ID selected will fill that hold. Use for circumstances like placing a hold on your library's item that needs attention, like repair or relabeling.

Range:

A SYSTEM LEVEL HOLD means any holdable item. A GROUP LEVEL HOLD may be used to choose items from only your library plus your library branches to fill the hold.

Once you have verified the information, select PLACE HOLD.

Pickup at: MP_MORTON v	Expires: 11/1	8/2025
Comments: place at drive-up window		
Date suspended: 1/28/2025	Date unsuspended: 2/2/	2025
Level: Ocopy Title Range: Library Oroup System		⊖ Allow Recall ● No Recall ⊖ Recall now (RUSH)
□ Make hold first in queue		

If the hold is successful, you will get this message:

₩ Complete ×
A hold has been placed on the item
Run, Rose, run
Parton, Dolly, author.
FIC PAR
A36701143774
Place Hold for Another User
Place Another Hold for This User
Remove This Hold
Modify This Hold
Close

#### If the hold is not allowed, you will get this message:

Place Hold . No Hold	Anowed Overhue	,
	Hold not allowed	
AD PIG (3-D)	Copy: 1	
A13300996431		
ACCUCUT DIE SH	APE: PIG (3-D)	
No hold allowed o	override	
	Svenue.	
1		

The standard override will not work. You can look for the item on another record to place the hold. Or you can call the owning library to see if they are willing to send the item for your patron. The owning library may be able to place the hold in Workflows, depending on their hold rules.

#### Alternate way to place holds

In the Holds Group, Choose Place Hold.



Scan or enter patron information in User ID. Use the Item Search helper <sup>9</sup> to search for the requested item.

User Informatic			
Name:	KWERAM, patty	Status:	DELI
Profile name:	ADULT	Amount owed:	\$2.00
User categories	s: <u>Y</u>	Overdues:	0
Group ID:	2037	Privilege expires	: 12/3
Item informat	ion		
Identify User			
	101		

# This will open an Item Search box. Search for the item requested. See **Item Search and Display Guide** for details.

PI	ace Hold ×		
	Hold		
j d	e Hold : Item Searc		- 🗆 ×
	_ 🖗 🕅 ← -		
	Search for:	· · · · · · · · · · · · · · · · · · ·	Search
	F Index:	Title v	Type:
	Library:	ALL v	<ul> <li>Keyword</li> </ul>
	(		OBrowse
	Current:	Kock Harbor Search and Kescue / by Colleen Co JF COB ID/A3650/089/48	<ul> <li>Exact</li> </ul>
	Ic		

# Select the item and choose Place Hold. The hold isn't completed yet!

ce Hold ×									
Hold Item Search	⊨ m. 1/10							_	-
• → 🏹 A									
Search for:	frozen river							~	Search
Index:	Title							~	Type:
Library:	ALL							~	<ul> <li>Keywa</li> </ul>
Current: F	Rock Harbor Search and Rescue / by Colleer	n Co JF COB ID:A36507	089748						⊖ Brows
KEYWORD T	itle frozen river. ALL: 13 records								Ornder
Title		Author		Carrier Typ	e		Pub. Year	Libra	ry Copies
Secrets of th	e forest : 15 bedtime stories inspired by	Klepeis, Alicia, 1971- author.		volume			2023	1	
The frozen r	iver : a novel	Lawhon, Ariel, author, narrato	or.	other			2023	6	
The frozen r	iver : a novel	Lawhon, Ariel, author.		volume			2023	14	
The frozen r	iver : a novel	Lawhon, Anel, author.		volume			2023	07	
e (b) AAS I e ob AKIN e ob AKIN e ob AKIN e ob AKIN e ob AF L e ob AP A e ob AF L e ob AF	0K-PLD 1 CAW - AASTOR-PLD A27000174954 - 1 - BOOK - INTRANSIT SON-PL AW - AKINSON-PL A32200645964 - 1 - BOOK - CHECKEDOUT LPHAPK AWHON - AP_ALPHAPK A125003943260 - 1 - BOOK - CHECKEDOUT -PLD ZAW - AYEK-PLD A36505629966 - 1 - BOOK - CHECKEDOUT IROWN-C W - B0_BROWN-C	- Can't Circ - <mark>Can't Circ</mark> - Can't Circ	Home location: f Item category 1: f Item category 3: f Item category 5: l Item category 7: l Date category 9: l Date cated: 1 Date last charged: 1 Date last charged: 1 Date inventoried: 1 Times inventoried: 0	ICTION ICTION ICTION OOK MYSTERY INDEFINED INDEFINED 2/5/2023 /22/2025 /22/2025 /22/2025,7:33 lever	Current location: Item category 2: Item category 4: Item category 6: Item category 8: Item category 10: Media desk: Previous user ID: Last activity: Total checkouts: In-house uses:	CHECKEDOUT ADULT BIO-FIC UNDEFINED UNDEFINED UNDEFINED none D444018748 1/22/2025 17 0	Ongoing renewals: Checkouts to date: Renewals to date: Date last cleared:	2 1 0 1/2/:	2025
			Place Hold Cancel						
		Gat Lloar	Gat Itam Place	Place Ho	d la				
		Information Info	ormation (b) Hold	for Another	User Close				

Remember that any holdable item on that record may fill a system-wide hold. Verify patron and pickup information. Then choose Place Hold.

Nace Hold +										
108										
	P & B									
User Information										
Name:	KWERAM, patty	Status:	DELINQUENT	Library:	AG_ALS-I	PDC				
Profile name:	ADULT	Amount owed:	\$2.00	Available holds	:0				N	ote: PATTY'S DEMO ACCOUNT.
User categories:	Y	Overdues:	0							
Group ID:	2037	Privilege expires	12/31/2026							
The frozen river : F LAWHON Cop	a novel / Lawho y:1 ID:A1260	n, Ariel, author. 1943260								
Identify User										
								Street		715 SABRINA LN
								City, s	tate:	EAST PEORIA IL
User ID: PKDEMO	01							Zip:		61611
								Phone	12	866-940-4083*
								Email:		patty.kweram@railslibraries.o
Identify item										
Item ID: A12603	943260									
Hold Info										
Pickup at:	MP_MORTON			Expires:	11/20/	2025	•			
Comments:		×.		- Outer second second			Tan I			
Date suspended:		*		Date unsuspende	ro:					
Level/Range						Recall	status			
Level: O Copy	o Title							No. Doce B. or Doce B		- (PL PTA)
Range: 🔿 Libra		istem				O ANO	w necall Or	No necali O necali	nov	e (KOSH)
Make hold fire	t in queue									
				Get Liver 1	Set Item	Pla	er R	ace Hold		
				information info	rmation 6	N H	id for Ar	Clo	950	

If successful you will get this message:



# Modify Holds

Select Modify Holds for User. Only some aspects of an existing hold may be modified.

Common Tasks	Modify H	olds for User 🗴			_
Users	💿 🏂 🖡 User In	formation			
Items	Name:	namo	Status:	Librar	ry:
Holds	Office     Office	tegories: D:	Overdues:	Availo	able fiolds.
🕰 Flace Holds	Identify	User			
Modify Holds for User	User ID	:	Cu	rrent:	KWERAM, patty PKDEMO1
🍋 Display Title Holds	List of I	Holds			
🙀 Display Item Holds	🗆 Sele	ct All			
🙀 Modify Holds for Item	Modify	Title	Reca	all	Pickup at
🙀 Remove Item Hold	Would	Inde	need		i ickup ut
💐 Trap Holds					
🙀 Place Research Hold					
街 Onshelf Items					

# Scan the User barcode or use the User Search Helper to see the list of active holds.

Aodify Holds for	User x									
It's Holds for User										
8 <b>6</b>										
User Information	on									
Name:	KWERAM, patty	Status:	DELINQUENT	Library:						
Profile name:		Amount owed	\$2.00	Available holds: 0				ATTIC DEMO ACCOUNT		
User categorie	s: NONE	Overdues:	0				Note: P	ATTY'S DEMO ACCOUNT.		
Group ID:	2037									
Identify User										
							Street:	715 SABRINA LN		
							City, state	e: EAST PEORIA IL		
User ID: PKDEN	101						Zip:	61611		
							Phone:	866-940-4083*		
							Email:	patty.kweram@railslibrari	es.org	
List of Holds										
Select All										
Modify	Title	Recall	Pickup at	Pickup by	Expires	Status	Comm	ent Record Status	Suspended	Unsuspended
0	The frozen rive	r NO	MP_MORTO	ON	11/20	/2025 (unavailable)			NEVER	NEVE
0	The small and t	h NO	MP_MORTO	ON	11/20	2025 (unavailable)			NEVER	NEVE
0	How we learn t	o NO	MP_MORTO	ON	11/20	/2025 (unavailable)			NEVER	NEVE
-			-							

Select the hold to modify and choose Modify.

	(Py Holds for User										
ber Information   Name:   KVERAM, patty   Status:   DELINQUENT   Library:   Available holds: 0   Juer categories:   NOVE:   Overdues::   0   Group ID:   2037      Street: 715 SABRINA LN City, Status: City, Status: Comment: Record Status: Status: Comment: Record Status: Status: Comment: Record Status: Status: Comment: Record Status: Status: Never: Never: Never: Never: Never: Neve: Never: Neve: Net	1 <b>4</b> ,										
Name: <u>WWERAM, paty</u> Status: DELINQUENT Library: Available holds: 0 Broup ID: 2037 dentify User Assister ID: PKDEMO1 Sever Lterge in the force niver NO MP_MORTON 11/20/2025 (unavailable) NEVER N How we learn to NO MP_MORTON 11/20/2025 (unavailable) NEVER N How we learn to NO MP_MORTON 11/20/2025 (unavailable) NEVER N	User Information										
Get Uper Lung Modfy Another and	Name: K Profile name: User categories: N	WERAM, patty S A NONE C	tatus: DE mount owed: \$2 Overdues: 0	LINQUENT .00	Library: Available holds: 0			Note: P	PATTY'S DEMO ACCOUNT.		
dentify User          Street:       7.15 SABRINA LN         City, state:       EAST PEORIA IL         Jpr:       61611         Phone:       866-940-4083*         Email:       patty.kweram@railslibraries.org         ist of Holds	Group ID: 2	2037									
Street: 715 SABRINA LN City, state: EAST PEORIA LL Zip: 61611 Phone: 866-940-4083* Email: patty.kweram@railslibraries.org ist of Holds Select All Wodfy Title Recall Pickup at Pickup by Expires Status Comment Record Status Suspended Unsuspended The frozen river NO MP_MORTON 11/20/2025 (unavailable) NEVER N How we learn to NO MP_MORTON 11/20/2025 (unavailable) NEVER N How we learn to NO MP_MORTON 11/20/2025 (unavailable) NEVER N	Identify User										
Seer ID: PKDEMO1  City, state: EAST PEORIA IL Zip: 01611 Phone: 866-940-4033* Email: patty.kweram@railslibraries.org  ist of Holds  Select All  Modify Thic Recall Pickup at Pickup by Expires Status Comment Record Status Suspended Unsuspended The small and h NO MP_MORTON 11/20/2025 (unavailable) NEVER N How we learn to NO MP_MORTON 11/20/2025 (unavailable) NEVER N  Cet Uter: u. u. Modify Another at								Street:	715 SABRINA LN		
Jser ID: PKDEMO1 Zip: 61611 Phone: 866-940-4083* Email: patty.kweram@railsilbraries.org ist of Holds Select All Modify The frozen river NO MP_MORTON 11/20/2025 (unavailable) The small and th NO MP_MORTON 11/20/2025 (unavailable) How we learn to NO MP_MORTON 11/20/2025 (unavailable) NEVER N O How we learn to NO MP_MORTON 11/20/2025 (unavailable) NEVER N								City, state	EAST PEORIA IL		
Phone: 866-940-4083* Email: patty.kweram@railslibraries.org	Jser ID: PKDEMO	1						Zip:	61611		
Email: patty.kweram@railslibraries.org								Phone:	866-940-4083*		
ist of Holds Select All Modify Title Recall Pickup at Pickup by Expires Status Comment Record Status Suspended Unsuspender NEVER N The small and th NO MP_MORTON 11/20/2025 (unavailable) NEVER N How we learn to NO MP_MORTON 11/20/2025 (unavailable) NEVER N								Email:	patty.kweram@railslibrar	ies.org	
Select All         Modify         The frozen river NO       MP_MORTON         11/20/2025 (unavailable)       NEVER         The small and th NO       MP_MORTON         11/20/2025 (unavailable)       NEVER         How we learn to NO       MP_MORTON         11/20/2025 (unavailable)       NEVER         How we learn to NO       MP_MORTON         11/20/2025 (unavailable)       NEVER	ist of Holds										
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Only certain details may be modified, typically the pickup library or suspension dates.

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0		Date suspended: 1/31/2025 🛛 Date unsuspended: 02/07/2025 🚱	
-10		Comment: O Append O Replace O Remove	

The patron may also modify holds using their RSAcat account.

# **Remove User Holds**

Use when a patron no longer wants to wait for a hold. Choose Remove User Hold in the Holds group.

Common Tasks	<ul> <li>many nous for oser s</li> </ul>		
	44		
Joers	User Information		
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	Profile name:	Amount owed: Avail	lable holds:
olda	User categories:	Overdues:	
2447	Group ID:		
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O'spiey Liter Holds	Identity User		
Modify Holds for User	User ID:	Current:	KWERAN, patty
Remove User Hold			PKDEMC2
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an love ton hou			
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Scan or enter the User ID to see a list of active holds. Select the box next to the hold to be removed. Choose Remove Hold.

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📸 Piace Holds		Identify User											
odify Holds for User	- 11								Street:	715 SABRINA LN			
Remove User Hold	- 11	User ID: PKDEM	01						Zip:	61611			
🍖 Display Title Holds	- 11								Phone:	866-940-4083*			
B Display Item Holds									Email:	patty.kweram@railslib	oraries.org		
Modify Holds for Item	- 11	the efficiency											
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	<u> </u>												
In-Transit Items	۲												
						Get User Information	Remove Holds	Remove Holds for Another User	Close				

# A confirmation will appear:



#### **Remove Item Holds**

Use when you have the physical item that the patron no longer needs. *Care must be taken to remove the hold for the correct patron when the item has more than one hold on it.* In the Holds group, choose Remove Item Hold.

ltems	8
Holds	۲
Place Hold	
🔒 Display User Holds	
💕 Modify Holds for User	
📸 Remove User Hold	
💊 Display Title Holds	
🚱 Display Item Holds	
Modify Holds for Item	
🧏 Remove Item Hold	
🏘 Trap Holds	
🙀 Place Research Hold	
An Onshelf Items	

Scan the item. A list of TITLE and COPY holds on that item will appear. MAKE SURE to select your patron's hold!

	Remove Item Hold x							
Common Tasks 🛞	Bolt mm tox							
Users	l à							
	Onyx storm / Yarros,	Rebecca, author.						
ltems 🛞	FIC YAR EMP #3 Co	oy:2 ID:33441008057	660					
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In-Transit Itams 💿				Get Item Rem Information Hol	ove Remove Holds ds for Another Item	Close		

Select the box next to the correct patron's hold and choose Remove Holds. Ensure that the correct hold was removed in the confirmation box.

ser ib	Item ID	litte
KDEMO1	33441008057660	Onyx storm

# Tips and Tricks

When checking out an item that has an available hold, a pop-up box appears. Which do you choose and why?

	CheckOut x			
Common Tasks 🛞	Bout			
2 CheckOut	🎞 🛍 😫 🍆 🖑 🐌 📾 🖌 🕼 🕼	<b>A</b>		
🚇 Discharge (Checkin)	User Information			
🐚 Fine Free Discharge	Name: PATTY BOOK CLUB, PAT	TRICIA Status: OK Lib	rary: W0_WASH-PL	
P Discharging Bookdrop	Profile name: BKCLUB-NRC	Amount owed: \$0.00 Av	ailable holds: 0	
😰 Renew User	User categories: Y	Overdues: 0 Privilege expires: 10/13/2025		
🔞 Renew Item	Gloup ID.			
🞒 Billing a User	Identify user	Holds Block Override	×	
Paying Bills		1 Item has holds		Street: 715 SABRINA LN
B Item Search and Display	User ID: PKDEMO2	This item is now being held for	Address	Zip: 61611
G Check Item Status		PKDEMO1 KWERAM, patty	Address	Phone: 866-940-4083
2 Help		ED GINGERBREAD GIRL	Copy: 1	Email: patty.kweram@railslibraries.org
S Print	Identify item	A13300997542	EQUIP-MISC (EQUIP)	
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Use Override & Checkout Item and enter the standard override when a patron wants to check out the item. A patron with the item in hand has priority over the hold.



Checkout Item

Use Override Checkout Item & Cancel Hold and enter the standard override when you are checking out to a patron's family member, like when a parent is checking out an item that is being held on their child's account. *Follow your library policy when choosing this. Your library may require the person picking up the hold to use the library card the hold was placed on.* 

# See previous holds

A patron doesn't pick up their hold before the pickup-by date and it is returned/sent to fill the next hold. Or they want to place it on hold again. Find the information in Workflows!

In Circulation+, Users Group, choose Display user and enter the patron information. Choose the Holds tab.

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onfirm Address	Identify user
🗿 Renew Privilege	
Suspend User	
🖀 Remove User	
鑃 Unsuspend User	
Items	
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Holds	

Use the scroll bar on the right to scroll to the bottom of the holds page.

SirsiDynix Symphony Workflows: Display User										- 0 ×
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Suspend User							City, state	EAST PEORIA IL		
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M Unsuspend User							Email:	patty.kweram@r	ailslibraries.org	
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🔒 Display User	Name KWERAM pathy	1
💕 User Registration	Id: PKDEMO1	
🖀 Modify User	Group ID: 2037	
🗳 Copy User	Profile name: ADULT	
of Confirm Address	Identify user	
Renew Privilege	Street: 715 SABRINALN	
Suspend User	User ID: PKDEMO1 Zio: 5611 4	
🖀 Remove User	Phone: 866-940-4083*	
🛃 Unsuspend User	Email: patty.kweram@railslibraries.org	
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Change the Display Options for Type of Hold from Active to All.

All the holds will be listed. Select a column heading to sort the list of holds. For a hold that had been available it will show the pickup library and the pickup-by date. (Note that sorting doesn't work when there have been blanket holds on the account).

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Questions? Contact the RSA Help Desk at <u>help@rsanfp.org</u> or at 866-940- 4083.