Basic Workflows Holds Workshop Guide

**Last updated: May 20, 2025**

- Sharing and Holds Topic Page
- Sharing and Holds Policy (draft)
    - Holds and Sharing Policy DRAFT 4.9.25.docx
    - RSA recommends that member libraries share all circulating item types.
    - To maintain the principle of reciprocity, your patrons can only request items that you share.
    - Checkout rules for transited items are set by the checkout library and should not be modified without permission of the owning library.
    - Do not override renewal limits for another library's item without permission from the owning library.
    - Each library can have their own hold rules. Libraries with hold restrictions should inform their patrons of these limits.
    - Review specific library's hold rules
        - https://alsi.sdp.sirsi.net/custom/web/RSAweb/SystemInfo/Parameters/Hold%20Map.xls
    - If you receive an item in delivery to fulfill a hold, even if Workflows should have prevented the hold, you are permitted to circulate the item to your patron.

- Review WF terms
  - Groups, Wizards, Helpers
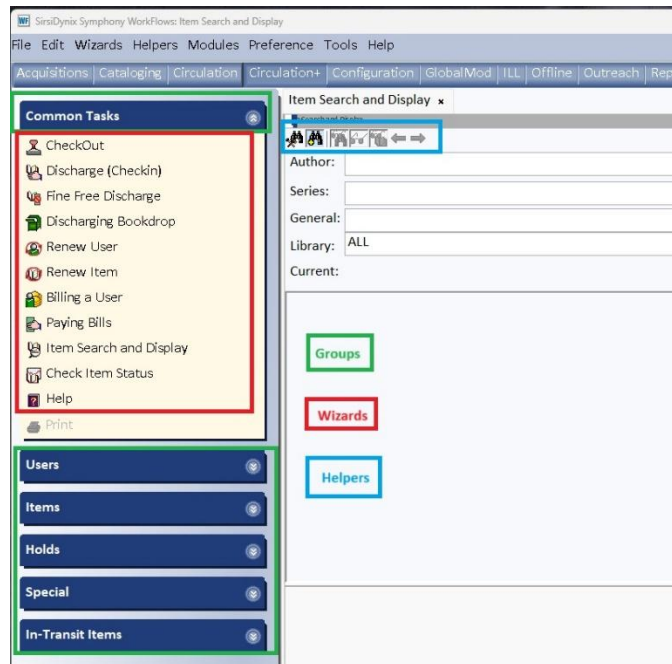
- Search Strategies – Item Search and Display [link to come]
  - Advanced Search – Keyword
    - Author + title
  - Series: Ranger's Apprentice
  - Subject: weather
  - Pickax: Juvenile nonfiction
  - Also show
    - Spanish
    - Large Print CAT 3
    - Audiobook CAT 3
  - Simple search. Enter title Dog Man, change to BROWSE
  - Detailed Item Display – review screen of item with several holds. Demo an item with many holds.
    - (BCA report Titles with More than 20 holds RSA-wide)

- Placing Holds
  - [Placing Holds Guide](#)
  - Modifying Holds
    - Also Display User – Holds tab – right click on item
  - Removing Holds
  - Checking out when there is an available hold
    - [Holds Block Override](#)
  - Tips and Tricks
  - Display title holds
    - (BCA report Titles with More than 20 holds RSA-wide)
    - "I have a hold on x – when will it come in"
  - Placing Book Club Holds
    - https://support.librariesofrsa.org/wp-content/uploads/2024/12/Placing-Book-Club-Classroom-or-Research-Holds-Guide-2024-12-02.pdf
    - Demo To Kill a Mockingbird – several formats/schools
    - Demo subject like weather if time

- The hold cycle is not complete until an item has been checked out!

- Processing Holds
  - [Processing Holds Guide 2025-04-11](#)
  - Pick List
  - [Hold Requests from a non-RSA library](#)
  - When items aren't available to fill a hold
  - Clean Hold Shelf
  - Delivery
  - Lost in Transit
  - Check Item Status
- [ILL Resource page](#)
- [RSAcat](#) holds – the patron perspective
- Display User and Check Item Status
- [How holds work](#)

Extra:

Recall Status

This field specifies the type of recall that has been placed on an item. The recall types are Allow Recall, No Recall, and Recall Now (RUSH). The recall type is set in the Place Hold wizard and can be changed with the Modify User Holds wizard or Modify Item Holds wizard.

- Allow Recall specifies that if the current user has had the item at least as long as the recall loan period specifies, even if the item is not due yet, the item can be recalled.
- No Recall specifies that the hold request user waits until a copy of the requested item is returned. The item is not recalled.
- Recall Now (RUSH) specifies that the current user's charge due date is to be changed to the current date. No notification is sent.