



Resource Sharing Alliance
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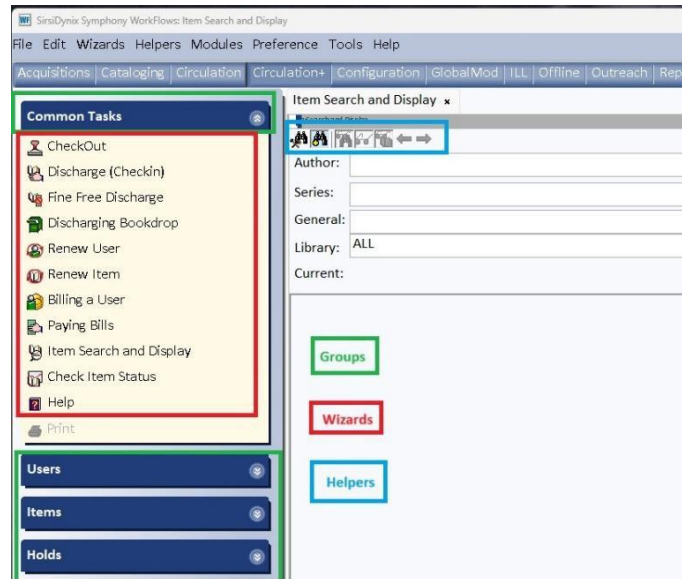
WorkFlows Basic Holds Workshop Guide

Last updated: September 23, 2025

Agenda for the WorkFlows Basic Holds Workshop

- [Sharing and Holds Topic Page](#)
- Sharing and Holds Policy
 - [Sharing and Holds Policy 2025-08-07](#)
 - 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
 - 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/project/holds/#Placing_Book_Club_Classroom_or_Research_Holds
 - 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 Guide](#)

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.

Sharing and Holds Training Resources

RSA recommends that you review the following documents and videos available at our support site and YouTube channel. This list is a useful primer on RSA's policies and standards regarding Holds and on how to manage holds in WorkFlows. These resources should be useful both as a refresher and to be given to new staff at your library. While most of these resources are held on the [Sharing and Holds page](#) of the support site some are also held on and the [Interlibrary Loan and Other Resource Sharing](#) page.

Found on the Sharing and Holds Page: <https://support.librariesofrsa.org/project/holds/>

1. Sharing and Holds Policy (2025-08-07):
https://support.librariesofrsa.org/project/holds/#Sharing_and_Holds_Policy.
2. Placing Holds Guide (2025-04-11):
https://support.librariesofrsa.org/project/holds/#Placing_Holds.
3. Placing Book Club, Classroom or Research Holds Guide (2024-12-02):
https://support.librariesofrsa.org/project/holds/#Placing_Book_ClubClassroom_or_Research_Holds.
4. Placing Book Club and Classroom Holds Video (6:30) (2020-04-16):
<https://www.youtube.com/watch?v=7fK3qPcgH0Q>.
5. Placing Research Holds Video (6:15) (2020-04-16):
<https://www.youtube.com/watch?v=ylmeJy0u1Sl>.
6. Processing Holds Guide (2025-04-11):
https://support.librariesofrsa.org/project/holds/#Processing_Holds.
7. Processing a Hold that Shows Available but Hasn't Transited Cheat Sheet (2025-03-21):
https://support.librariesofrsa.org/project/holds/#Processing_a_Hold_That_Shows_Available_but_Hasnt_Transited.
8. Using a No-Transit Account Guide (2025-01-13):
https://support.librariesofrsa.org/project/holds/#Using_a_NO-TRANSIT_Account.
9. How Holds Work Guide (2025-04-11):
https://support.librariesofrsa.org/project/holds/#How_Holds_Work.
10. Why Didn't my Item Fill My Patron's Hold? Guide (2024-12-16):
https://support.librariesofrsa.org/project/holds/#Why_Didnt_My_Item_Fill_My_Patrons_Hold.
11. OnShelf Items Wizard Video (3:48) (2020-06-12):
<https://www.youtube.com/watch?v=fY3DQ0Kv6xY>.
12. Renewing Items Cheat Sheet (2024-09-03):
https://support.librariesofrsa.org/project/holds/#Renewing_Items.
13. Renewing materials Video (4:36) (2021-08-06):
<https://www.youtube.com/watch?v=HvCMK6d9RBs>.

Found on the Interlibrary Loan and Other Resource Sharing page:
<https://support.librariesofrsa.org/project/ill-resource-sharing/>.

14. RSA Membership List with Delivery Codes (2024-10-29):
https://support.librariesofrsa.org/about/member-libraries/#_RSA_Member_Library_Delivery_Codes .
15. RAILS Delivery Codes and Labeling Procedure (2022-08-01):
<https://support.librariesofrsa.org/wp-content/uploads/2023/05/new-delivery-codes-22-07-28.pdf>.
16. Items Requested by a Non-RSA Library Procedure (2024-03-19):
https://support.librariesofrsa.org/project/ill-resource-sharing/#Items_Requested_by_a_Non-RSA_Library.
17. D1500 Numbers: How to Use Them and How to Search for Them Cheat Sheet (2024-01-23): https://support.librariesofrsa.org/project/ill-resource-sharing/#D1500_%E2%80%93_How_to_use_them_and_how_to_search_for_them.
18. Create and Delete a Temporary Record for a Non-RSA Interlibrary Loan Item Procedure (2024-06-26): https://support.librariesofrsa.org/project/ill-resource-sharing/#Create_and_Delete_a_temporary_record_for_a_Non-RSA_Interlibrary_Loan_Item.