

## Filling Holds on Available Items

You can have your students and teachers place holds on titles they want using the online catalog; the library staff will find the materials and deliver them to the classroom or hold them in the library for pick-up.

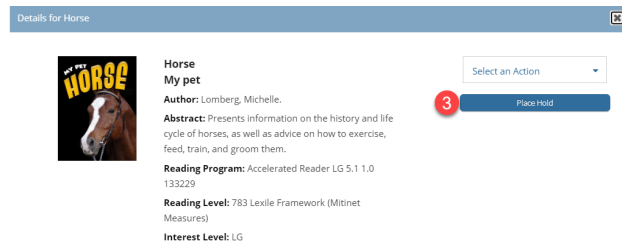
### Overview

1. Student/teacher places hold(s) in ISearch or Fetch
2. Library staff locate materials on the shelves
3. Library staff trap the holds to make the item(s) available for the user(s)
4. (Optional) Run a report of students/teachers with holds ready for pickup/checkout
5. Check out the materials to the user

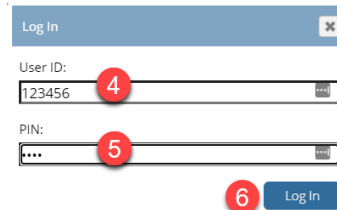
There are multiple options included in this document. Please find the combination that best fits the way you run your library on how to trap holds and run reports.

### Step 1: Place a hold in ISearch

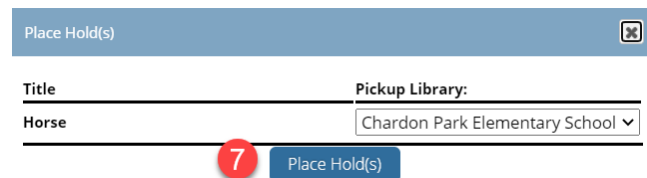
1. Search for a title in ISearch
2. Select the title to view the details
3. Click the PLACE HOLD button



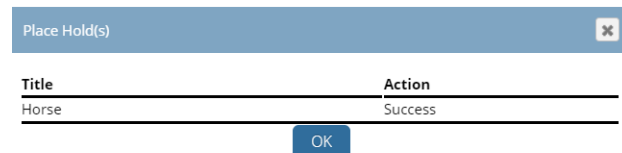
4. Enter your user ID
5. Enter your pin
6. Click the LOG IN button



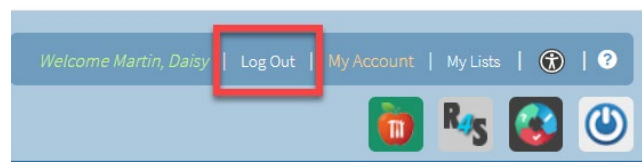
7. Click the PLACE HOLD(S) button



8. Hold has been placed. Click the OK button to close the popup and return to your search results

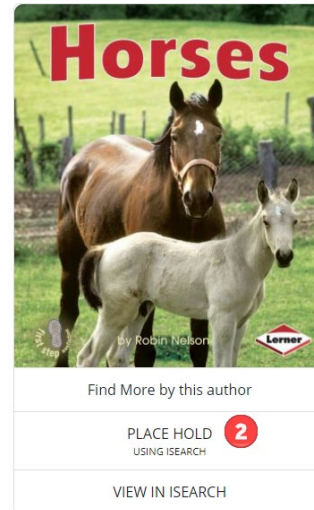


9. Look at the top for your name. If you are on a shared computer, click the LOGOUT link



## Step 1: Place a hold in Fetch

1. Search for a title in Fetch
2. Click the PLACE HOLD link



3. Enter your Alternate ID:
4. Enter your pin
5. Click the **Log In** button

✕
Log In

User ID

3

PIN

4

Log In
5

6. Change Pickup Library, if needed
7. Click the **Place Hold** button

✕
Place Hold

**Title** Horses

Pickup Library

6
▼

Place Hold
7

Cancel

8. Hold has been placed. Click the OK button to close the screen and return to your search results

Place Hold
✕

Hold successfully placed.

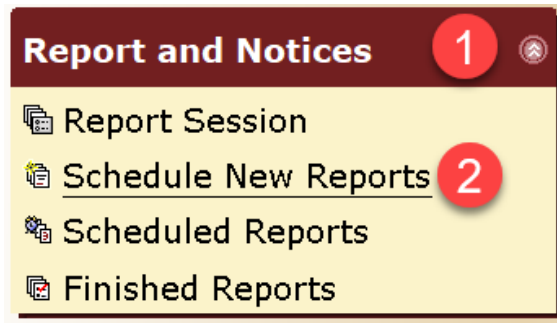
Okay
8

## Step 2: Library Staff create list of materials on shelves

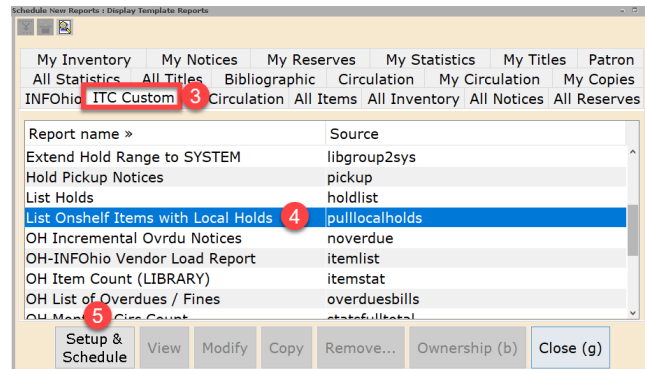
This report will assemble a list of all items in the district's libraries that need to be retrieved off the shelf to fill a hold. This list assembles all requests for holds on available items and must be run. This report is scheduled to run every night, in the event students/teachers have placed a hold after the scheduled run, you will need to run the report to update the list of items to be pulled.

This report will create a list of all holds in your district broken down by library. This list provides a list of items that have not yet been trapped.

1. Go to Reports and Notices wizard group
2. Click on Schedule New Reports



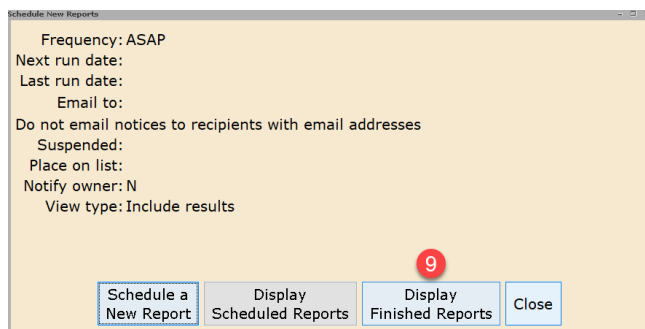
3. On the ITC CUSTOM tab
4. Locate and select the report "List Onshelf Items with Local Holds"
5. Either  
Double click on the report  
Or  
Click Setup & Schedule button



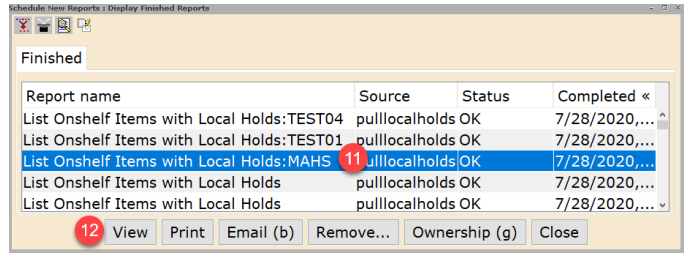
6. Go to the tab PRINT SEPARATE REPORTS FOR EACH LIBRARY
7. Add a check for "Print separate reports for each library"
8. Click the RUN NOW button



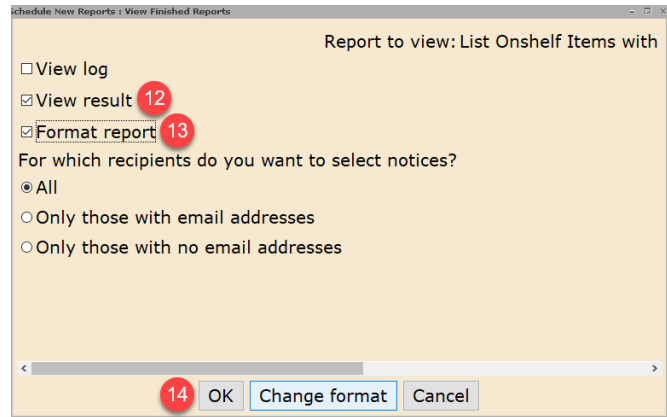
9. Click DISPLAY FINISHED REPORTS button



10. This report assembles a list of items with holds that are AVAILABLE for all buildings. Select the report with your building location
11. Either  
Double click on the report  
Or  
Click the VIEW button



12. View Result should be selected
13. Format Report should be selected
14. Click OK button



15. Report will open with a list of all items that need to be pulled from the shelf. The report will include the call number and title, the teacher's homeroom and name as well as the student's User ID and name.

HOLD PICKUP LIST

Produced Thu Dec 17 10:15:29 2020

Library: TEST02

**Call# and Title**

E SEU -  
Geisel, Theodor Seuss  
Green eggs and ham

copy:1 item ID:30790990022642 type:EASY

location:AVAILABLE

Homeroom:12 **Homeroom and Teacher Name**  
Teacher: ANKROM K

user ID: 20790950027195 **User\_ID and Username**  
user name:HARRELL, Nicholas

Pickup library:TEST01 Date of checkin:07/17/2020

## Step 2b (OPTIONAL): Create list of items that need pulled for only one class

You can run a list of items that need to be pulled for only one homeroom.

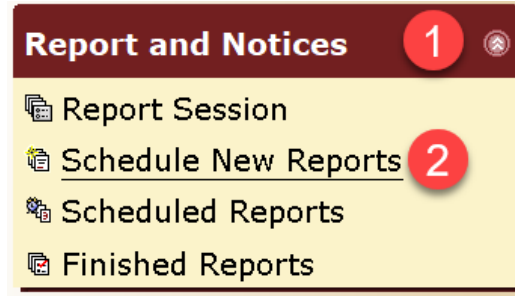
This report can only be run AFTER the List Onshelf Items with Local Holds report has been run.

This report will list students that have placed a hold and:

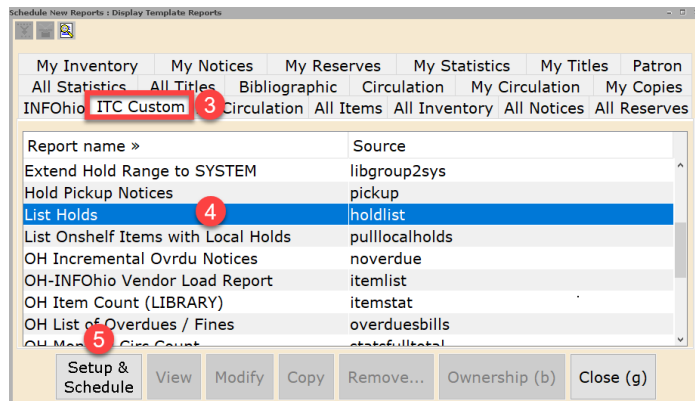
- The hold still needs to be trapped
- The hold has been trapped and is available for pickup **NOTE: Steps 18-37 will demonstrate how to run the report for only items that need to be trapped for one homeroom.**

Having both of these in one list may be confusing, but it is the only report that allows you to create a list of holds for only one teacher/class.

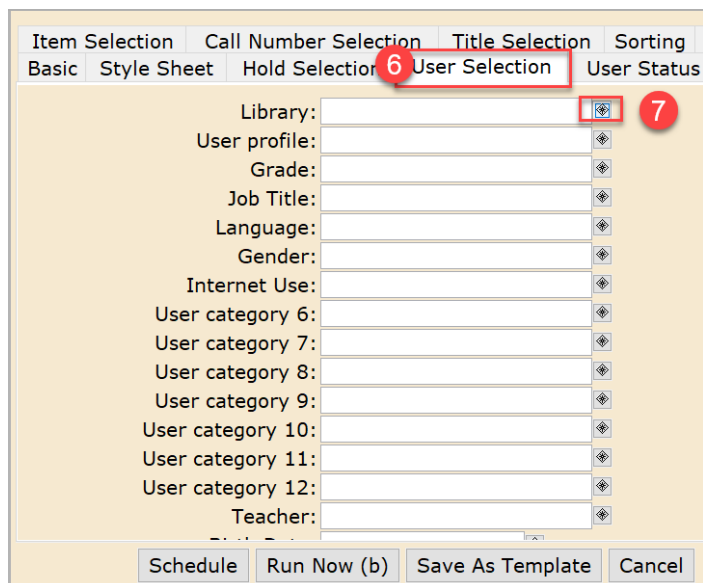
1. Go to Reports and Notices wizard group
2. Click on Schedule New Reports



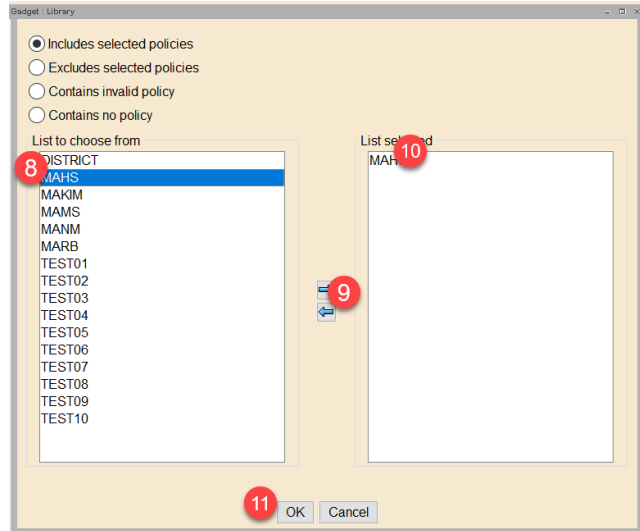
3. Go to the ITC CUSTOM tab
4. Locate and select the report "List Holds"
5. Either  
Double click on the report  
Or  
Click Setup & Schedule button



6. Go to the USER SELECTION tab
7. For Library click on the gadget

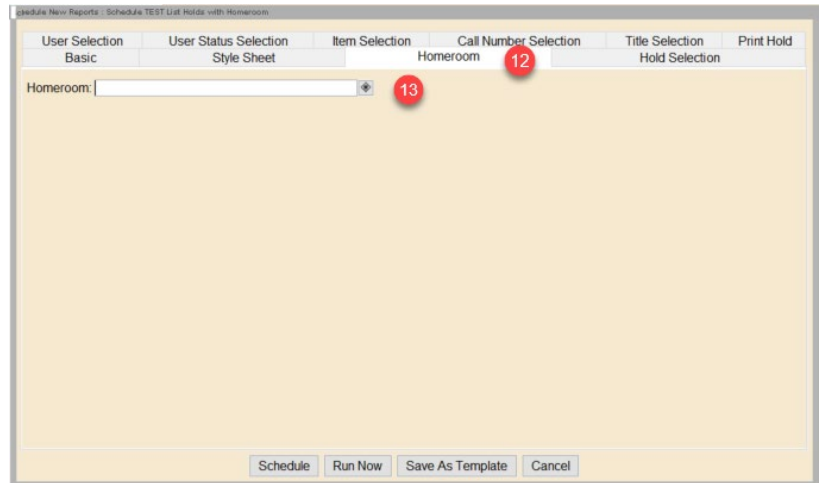


8. Select your library
9. Click the arrow
10. Move it to the LIST SELECTED column
11. Click the OK button



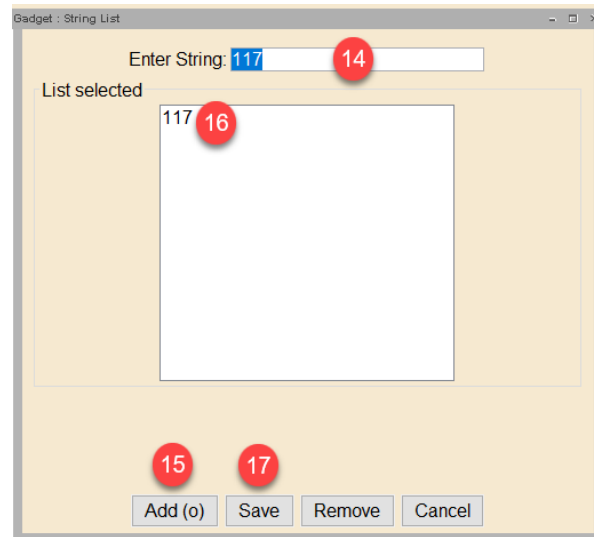
**NOTE:** Selection of Homeroom is OPTIONAL.

12. Go to the HOMEROOM tab
13. For Homeroom click on the gadget

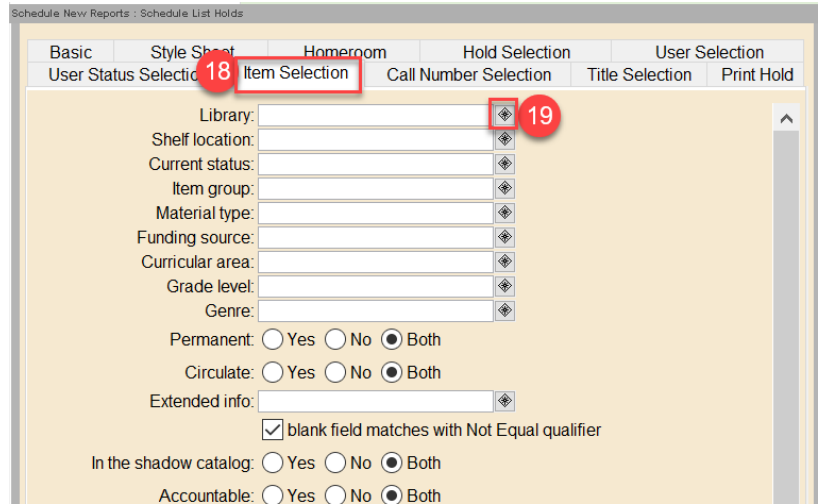


14. In the box labeled "Enter String" type the homeroom exactly as it appears in WorkFlows (CASE-SENSITIVE). If a special character such as a dash is in the homeroom name, then this must also be included.
15. Click the ADD button
16. The name will appear in the "List Selected" box
17. Click the SAVE button

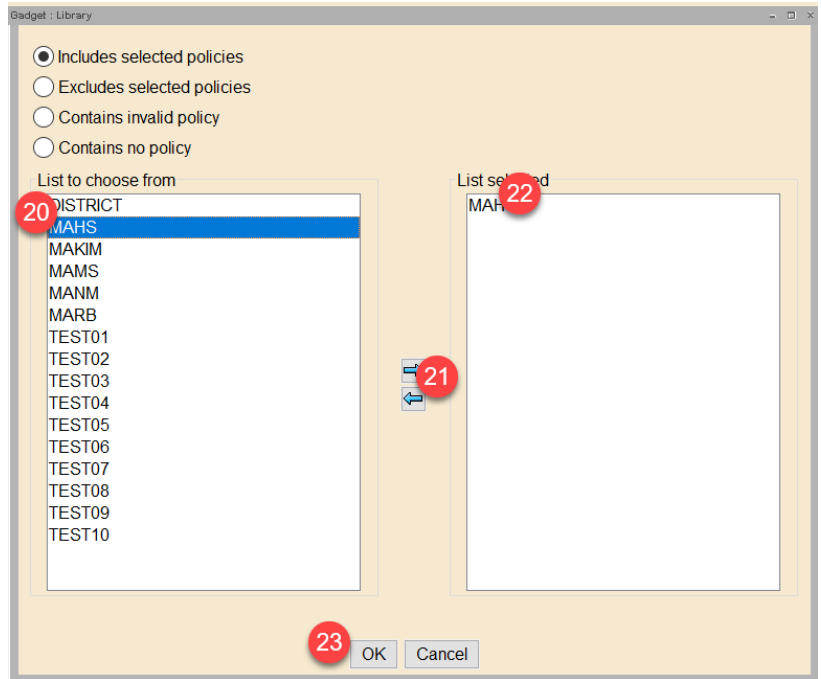
**NOTE:** You can only run this report for one homeroom at a time.



18. To run the report to only list items that need to be trapped go to the Item Selection tab
19. For Library click on the gadget



20. Select your library
21. Click the arrow
22. Move it to the LIST SELECTED column
23. Click the OK button



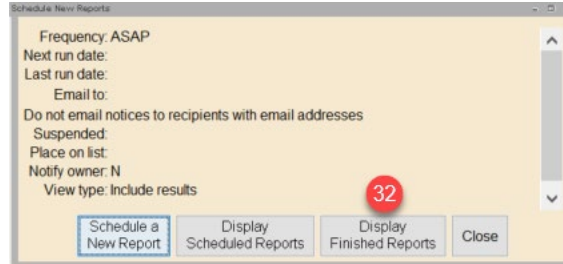
24. Select the Current Status gadget

- 25. Select Excludes selected Policies
- 26. Select CHECKEDOUT and HOLDS
- 27. Click the arrow
- 28. Move CHECKEDOUT and HOLDS to List Selected
- 29. Click OK

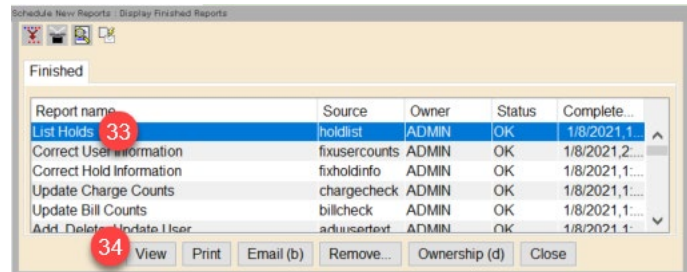
- 30. Click the RUN NOW button
- 31. **IDEA: Before clicking the RUN NOW button, consider the "Save As Template" option and save a copy of this report set up for each teacher.**



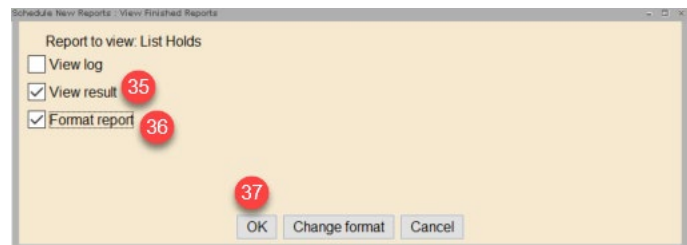
32. Click DISPLAY FINISHED REPORTS button



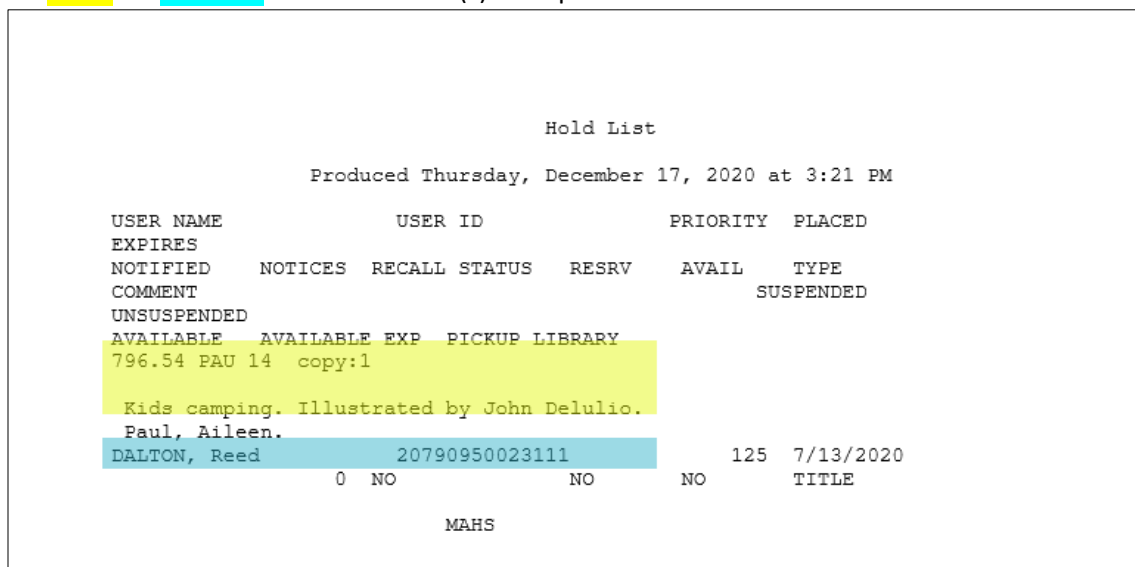
33. Select your report when it appears  
34. Either  
Double click on the report  
Or  
Click the VIEW button



35. View Result should be selected  
36. Format Report should be selected  
37. Click OK button



38. List of items for students for that teacher(s) will open with the titles in call number order



### Step 3: Trap holds to make items available for the user(s)

Items that have a status of AVAILABLE and have a hold attached will need to be 'trapped' so that the hold becomes available for the student/teacher.

With an "Un-trapped" hold the status of the hold is listed as (unavailable)

The screenshot shows the 'Display User' interface for user Daisy Martin. Under the 'Holds' tab, a table lists one hold for the title 'Horse' with an item ID of 307904400031... The status is '(unavailable)'. The hold was placed on 7/28/2020 and expires on 10/26/2020.

Title	Item ID	Level	Status	Placed	Pickup at	Expires
Horse	307904400031...	TITLE	_(unavailable)	7/28/2020	MAHS	10/26/2020

With a "trapped" hold, the status of the hold is listed as (available) and is ready to be checked out

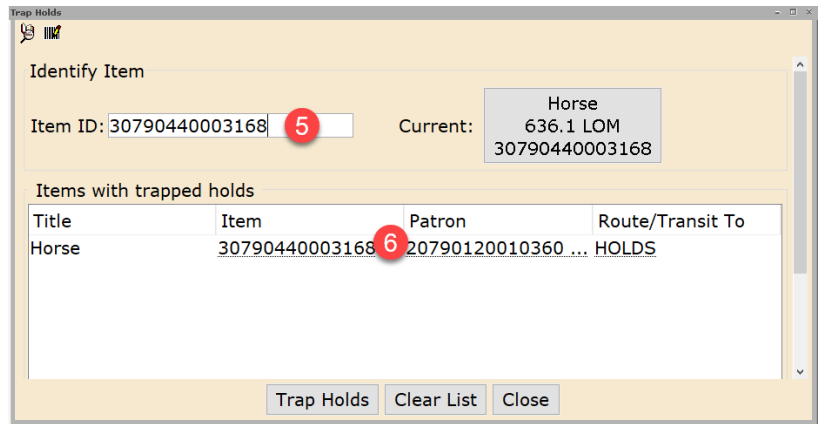
The screenshot shows the 'Display User' interface for user Daisy Martin. Under the 'Holds' tab, a table lists one hold for the title 'Horse' with an item ID of 307904400... The status is '(available)'. The hold was placed on 7/28/2020 and expires on 10/26/2020.

Title	Item ID	Level	Status	Placed	Pickup at	Pickup by	Expires
Horse	307904400...	TITLE	_(available)	7/28/2020	MAHS	8/12/2020	10/26/2020

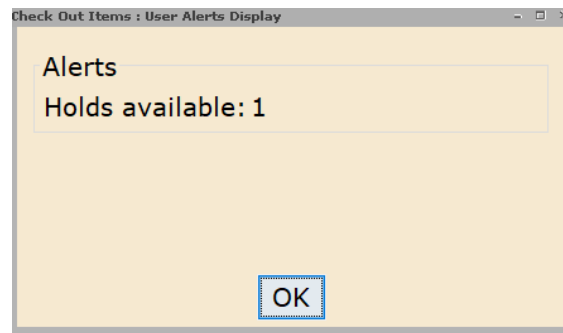
1. Print list of titles that have holds
2. Find the books on the shelves of your library
3. In WorkFlows, expand the HOLDS MAINTENANCE wizard group
4. Click on TRAP HOLDS

The screenshot shows the 'Holds Maintenance' menu with the following options: Place Hold, Display User Holds, Modify Holds for User, Remove User Hold, Display Item Holds, Display Title Holds, Reorder Hold Queue, Modify Holds for Item, Remove Item Hold, Place Blanket Hold, and Trap Holds. The 'Trap Holds' option is highlighted with a red box and a red circle containing the number 4.

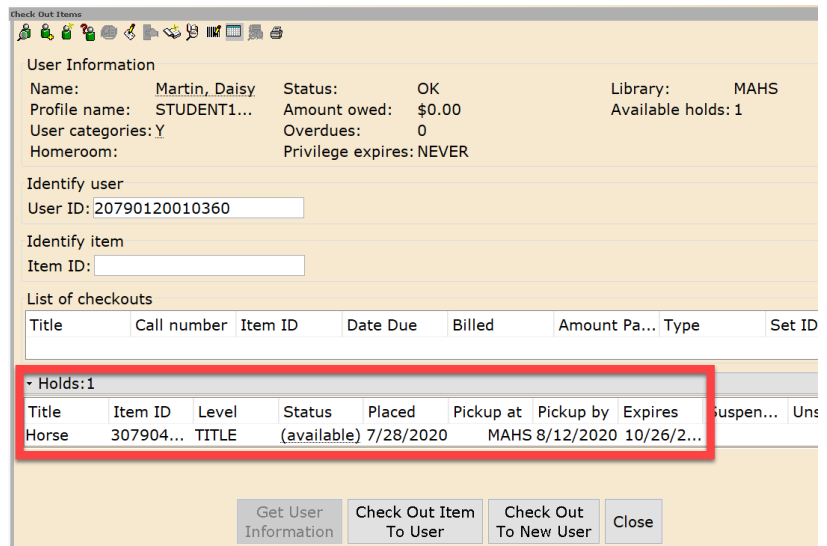
5. Scan the barcode of the item(s)
6. The title will appear along with the barcode of the user
7. Repeat until done



8. During Check Out, when you retrieve the user account you will be notified that there is a hold available
9. Click the OK button



10. The title of the available hold will appear along the lower part of the screen with a status of (available)



## Step 3b (OPTIONAL): Trap holds to make items available for the user(s) using MobileStaff

Items that have a status of AVAILABLE and have a hold attached will need to be 'trapped' so that the hold becomes available for the student.

The benefits to using MobileStaff are that you do not need to print the list. You can take your laptop or mobile device (iPad, mobile phone, etc) around the library to locate the materials and trap them at the same time.

With an "Un-trapped" hold the status of the hold is listed as (unavailable)

The screenshot shows the 'Display User' window for user 'Martin, Daisy' (ID: 20790120010360). The 'Holds' tab is selected, showing a table with one hold:

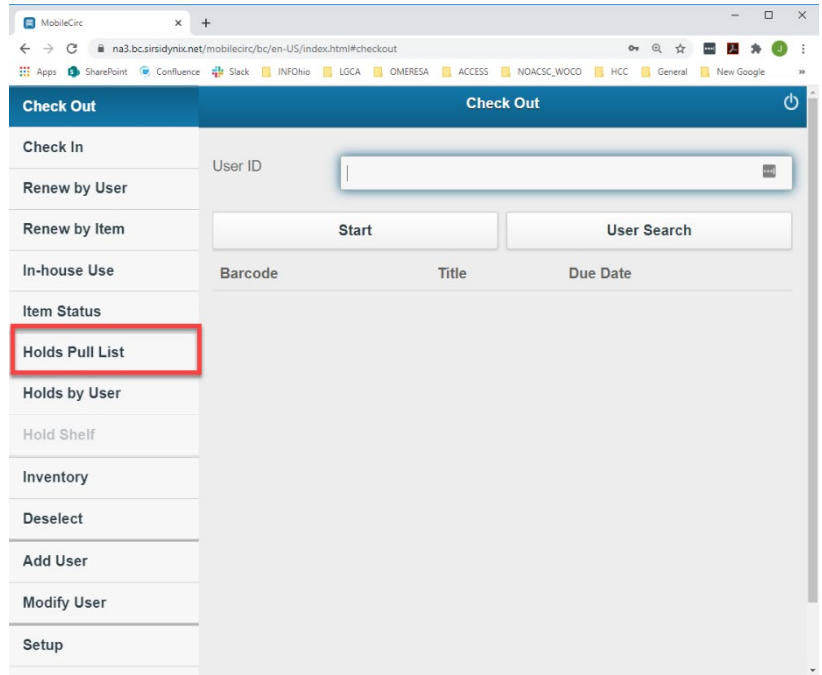
Title	Item ID	Level	Status	Placed	Pickup at	Expires
Horse	307904400031...	TITLE	_(unavailable)_	7/28/2020	MAHS	10/26/2020

With a "trapped" hold, the status of the hold is listed as (available) and is ready to be checked out

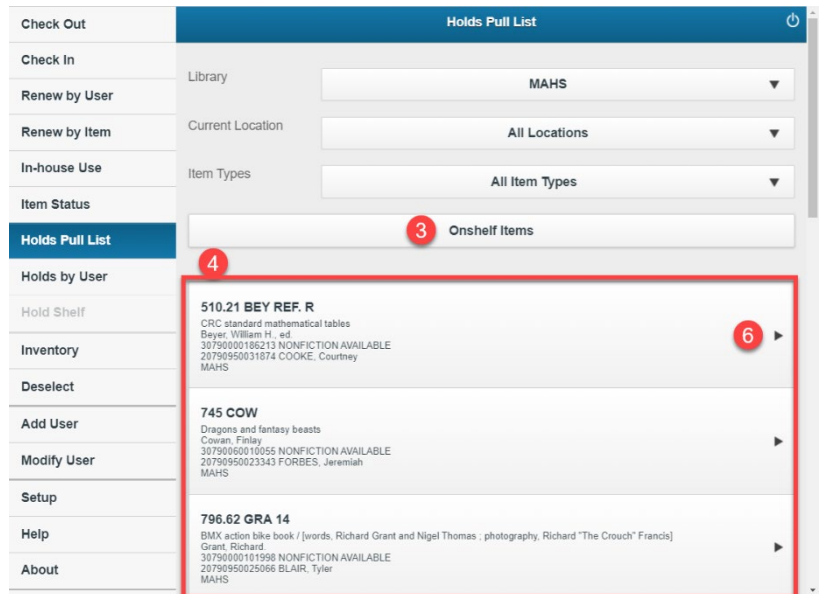
The screenshot shows the 'Display User' window for user 'Martin, Daisy' (ID: 20790120010360). The 'Holds' tab is selected, showing a table with one hold:

Title	Item ID	Level	Status	Placed	Pickup at	Pickup by	Expires
Horse	307904400...	TITLE	_(available)_	7/28/2020	MAHS	8/12/2020	10/26/2020

1. Log into MobileStaff
2. Click on HOLDS PULL LIST



3. Click the ONSHELF ITEMS button
4. List of items will appear in call number order
5. Find the books on the shelves of your library
6. When you locate an item, click the Triangle for the title



7. Click the button TRAP HOLD button

**510.21 BEY REF. R**  
CRC standard mathematical tables  
Beyer, William H., ed.  
30790000186213 NONFICTION AVAILABLE  
20790950031874 COOKE, Courtney

Trap Hold **7**

Delete Request

Mark Missing

OK

8. The hold has been trapped

9. Click the OK button to return to the list

**Hold**

Call # 510.21 BEY REF. R  
Title CRC standard mathematical tables  
Author Beyer, William H., ed.  
User ID 20790950031874  
Name COOKE, Courtney  
Pickup Library MAHS

OK

10. Repeat as needed

**Holds Pull List**

Library: MAHS  
Current Location: All Locations  
Item Types: All Item Types

Onshelf Items

**Holds by User**

**510.21 BEY REF. R**  
CRC standard mathematical tables  
Beyer, William H., ed.  
30790000186213 NONFICTION AVAILABLE  
20790950031874 COOKE, Courtney  
MAHS  
*Trapped*

**745 COW**  
Dragons and fantasy beasts  
Cowan, Finley  
30790060010055 NONFICTION AVAILABLE  
20790950023343 FORBES, Jeremiah  
MAHS

**796.62 GRA 14**  
BMX action bike book / [words, Richard Grant and Nigel Thomas : photography, Richard "The Crouch" Francis]  
Grant, Richard  
30790000119198 NONFICTION AVAILABLE  
20790950025066 BLAIR, Tyler

11. During Check Out, when you retrieve the user account you will be notified that there is a hold available

12. Click the OK button

**Check Out Items : User Alerts Display**

Alerts

Holds available: 1

OK

13. The title of the available hold will appear along the lower part of the screen with a status of (available)

The screenshot shows the 'Check Out Items' window. At the top, there's a toolbar with various icons. Below that is the 'User Information' section with fields for Name, Profile name, User categories, Homeroom, Status, Amount owed, Overdues, Privilege expires, and Library. The 'Identify user' section has a 'User ID' field containing '20790120010360'. The 'Identify item' section has an 'Item ID' field. Below that is a 'List of checkouts' table with columns: Title, Call number, Item ID, Date Due, Billed, Amount Pa..., Type, and Set ID. A dropdown menu labeled 'Holds: 1' is expanded, showing a table with columns: Title, Item ID, Level, Status, Placed, Pickup at, Pickup by, Expires, suspen..., and Uns. The first row in this table is 'Horse', '307904...', 'TITLE', '(available)', '7/28/2020', 'MAHS 8/12/2020', '10/26/2...', and empty cells for the last three columns. At the bottom of the window are four buttons: 'Get User Information', 'Check Out Item To User', 'Check Out To New User', and 'Close'.

## Step 4 Optional: Run a report of students with holds ready for pickup/checkout

After trapping the holds you can run a report for a list of students that have items available and ready for checkout.

The report “Users with Available Holds” lists multiple students on one page that have holds that have been pulled and trapped. With more than one user per page this report will save on paper if you print the list.

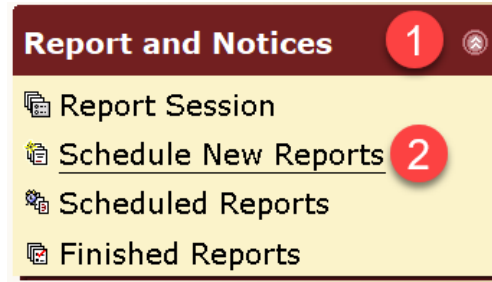
- It does not have the ability to report only 1 teacher/room.

The report “Hold Pickup Notices” allows you to generate a list of users that have holds available for pickup/checkout and limit the results to one teacher/class. The report prints one student per page.

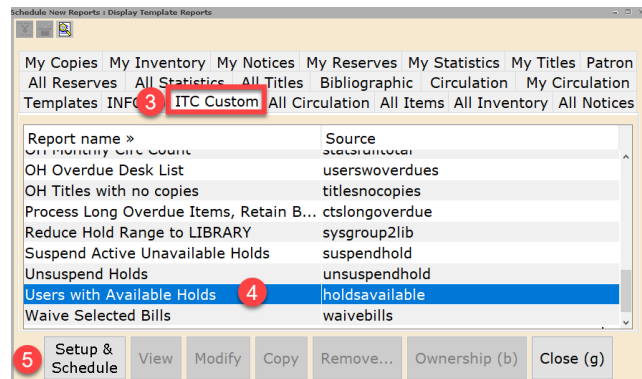
- Able to limit results to only 1 teacher/room

### Users with Available Holds

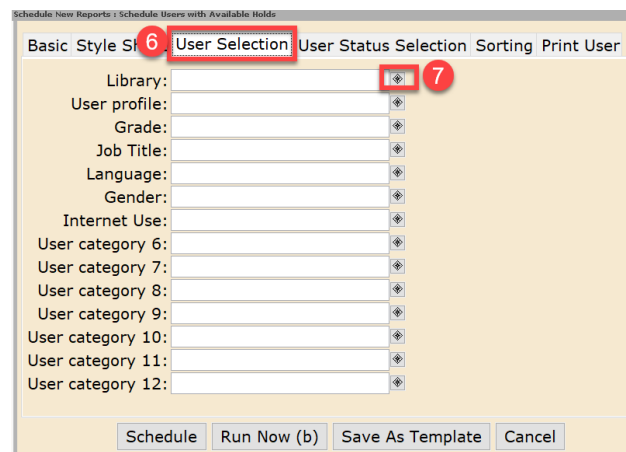
1. Go to Reports and Notices wizard group
2. Click on Schedule New Reports



3. Go to the ITC CUSTOM tab
4. Locate and select the report “Users with Available Holds”
5. Either  
Double click on the report  
Or  
Click Setup & Schedule button

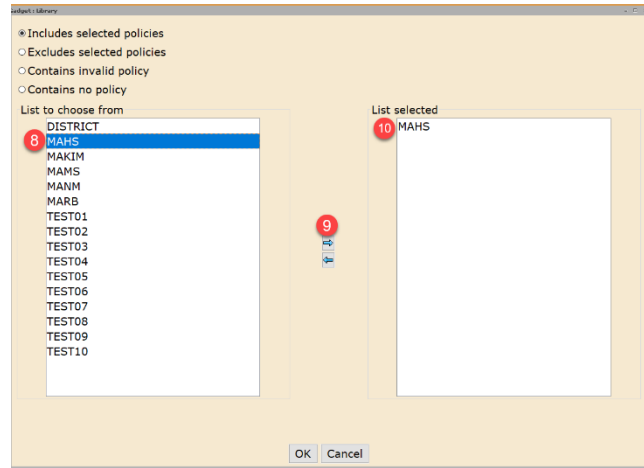


6. Go to the USER SELECTION tab
7. For Library click on the gadget

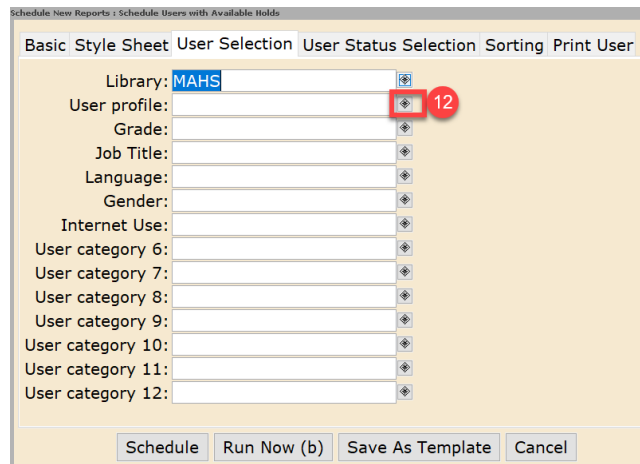




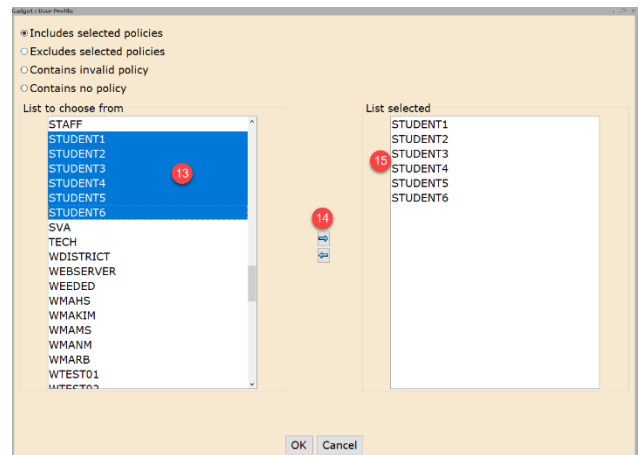
8. Select your library
9. Click the arrow
10. Move it to the LIST SELECTED column
11. Click the OK button



12. For User Profile click on the gadget



13. Select the profile(s) of your students
14. Click the arrow
15. Move them to the LIST SELECTED column
16. Click the OK button



17. **OPTIONAL** For Grade click on the gadget

Schedule New Reports : Schedule Users with Available Holds

Basic Style Sheet User Selection User Status Sele

Library: MAHS

User profile: NT4|STUDENTS|STUDENT6

Grade: 17

Job Title:

Language:

Gender:

Internet Use:

User category 6:

User category 7:

User category 8:

User category 9:

User category 10:

User category 11:

User category 12:

18. **OPTIONAL** Select the Grade(s)

19. Click the arrow

20. Move them to the LIST SELECTED column

21. Click the OK button

Select Grades

Includes selected policies  
 Excludes selected policies  
 Contains invalid policy  
 Contains no policy

List to choose from

01  
02  
03  
04  
05  
06  
07  
08  
09 18  
10  
11  
12  
ADULT  
COMMUNITY  
FACULTY  
GRADUATE  
KG  
KG-A  
K-C

List selected

20 09

19

OK Cancel

22. Click the RUN NOW button

23. Click the DISPLAY FINISHED REPORTS button

Schedule New Reports

Frequency: ASAP

Next run date:

Last run date:

Email to:

Do not email notices to recipients with email addresses

Suspended:

Place on list:

Notify owner: N

View type: Include results

23

Schedule a New Report Display Scheduled Reports Display Finished Reports Close

24. Select your report when it appears

25. Either

Double click on the report

Or

Click the VIEW button

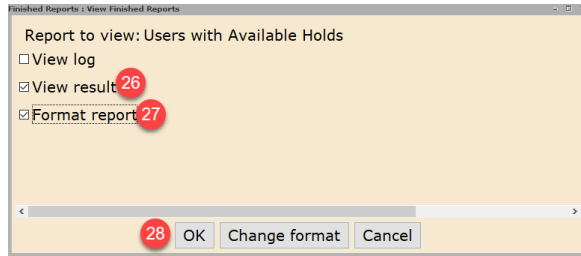
Finished Reports : Display Finished Reports

Finished

Report name	Source	Status	Complete...
Users with Available Holds 24	holdsavail...	OK	7/29/202...
List Holds	holdlist	OK	7/28/202...
List Onshelf Items with Local Holds:TEST...	pulllocalh...	OK	7/28/202...
List Onshelf Items with Local Holds:TEST...	pulllocalh...	OK	7/28/202...

25 View Print Email (b) Remove... Ownership (g) Close

- 26. View Result should be selected
- 27. Format Report should be selected
- 28. Click OK button



- 29. The report will open with a list of students that match your request that have a hold available for checkout

Available Holds List			
Produced Wednesday, July 29, 2020 at 3:13 PM			
BLAIR, Tyler	id:20790950025066	alt id:95002506	library:MAHS
*Holds:2	613.8 HYD 14	MAHS	
	Know about drugs / by Margaret O. Hyde and Bruce G. Hyde ; illustrated by Bill Morrison. Hyde, Margaret O. 1917-		
CALHOUN, Ryan	id:20790950025454	alt id:95002545	library:MAHS
*Holds:1	599.735 CLA 14	MAHS	
	Reindeer. Clarkson, Ewan.		
CHAPMAN, Jennifer	id:20790950024697	alt id:95002469	library:MAHS
*Holds:1	613.69 MCM 14	MAHS	
	The complete wilderness training book / Hugh McManners. McManners, Hugh.		

## Step 4 Optional: Run a report of students with holds ready for pickup/checkout

After trapping the holds you can run a report for a list of students that have items available and ready for checkout.

The report “Users with Available Holds” lists multiple students on one page that have holds that have been pulled and trapped. With more than one user per page this report will save on paper if you print the list.

- It does not have the ability to report only 1 teacher/room.

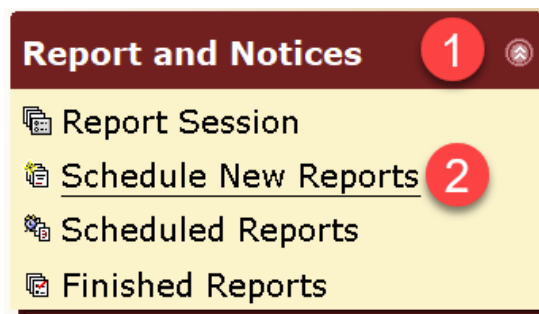
The report “Hold Pickup Notices” allows you to generate a list of users that have holds available for pickup/checkout and limit the results to one teacher/class. The report prints one student per page, and includes the teacher’s name and homeroom on the report.

The report can be run to email the student. If your school uses Gmail for the students and staff, and you want to email the student/teacher, you will want to test this report. Some schools are set up to not allow outside emails delivered to students. As this email will be sent from the library server, it is considered an “outside email.”

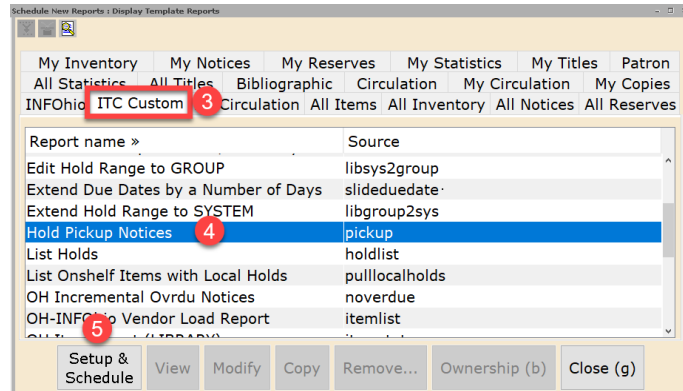
- Able to limit results to only 1 teacher/room

### Hold Pickup Notices

1. Go to Reports and Notices wizard group
2. Click on Schedule New Reports



3. Go to the ITC CUSTOM tab
4. Locate and select the report “Hold Pickup Notices”
5. Either  
Double click on the report  
Or  
Click Setup & Schedule button



6. Go to the USER SELECTION tab
7. For Library click on the gadget

8. Select your library
9. Click the arrow
10. Move it to the LIST SELECTED column
11. Click the OK button

12. For TEACHER click on the gadget

13. In the box labeled "Enter String" type the teachers name as it appears in WorkFlows

If the teacher name is in all capital letters in WorkFlows, then you will need to enter it in all capital letters.

14. Click the ADD button

15. The name will appear in the "List Selected" box

16. Click the SAVE button

Note: You can add multiple teachers. Repeat steps 13-15 as needed

17. Go to the HOLD NOTICE tab
18. To combine multiple holds for the same student/user on the same report add a check in the box "Combine Notices"

Screenshot of the 'Schedule New Reports' interface. The 'Hold Notice' tab is selected. A red box highlights the 'Hold Notice' tab, and a red circle highlights the 'Combine Notices' checkbox, which is checked. Other options include 'Salutation on notice', 'Alternative hold ID on notice', and 'Count as a notice sent'. Message fields are also visible.

19. OPTIONAL: "Count as a notice sent"  
Place a check mark here to limit the number of times this report can be printed or emailed for this title for this user.

If you plan on printing out these notices to put in the books so that you know who to deliver them to, it is unlikely that you will need this option and you can leave it blank.

20. For paper only copies of the report, click the RUN NOW button and continue with step 25  
or
21. OPTIONAL To send email notifications click the SCHEDULE button

Screenshot of the 'Schedule New Reports' interface. The 'Hold Notice' tab is selected. A red circle highlights the 'Count as a notice sent' checkbox, which is unchecked. A red box highlights the 'Schedule' button at the bottom. Other options include 'Combine Notices', 'Salutation on notice', and 'Alternative hold ID on notice'. Message fields are also visible.

**IDEA: Before clicking the RUN NOW button, consider the "Save As Template" option and save a copy of this report set up for each teacher.**

22. Place a check in the box "Auto email to recipients with email addresses in their patron record"
23. Change the subject line as desired
24. Click SCHEDULE button

25. Click DISPLAY FINISHED REPORTS button

26. Select your report when it appears
27. Either
  - Double click on the report
  - Or
  - Click the VIEW button

Report name	Source	Owner	Status	Compl...
Hold Pickup Notices	pickup	MAHS_KJ	OK	7/30/2...
Users with Available Holds	holdsav...	MAHS_KJ	OK	7/29/2...
List Holds	holdlist	MAHS_KJ	OK	7/28/2...
List Onshelf Items with Local Holds	pulllocal...	MAHS_KJ	OK	7/28/2...
List Onshelf Items with Local Holds:MAHS	pulllocal...	MAHS_KJ	OK	7/28/2...
List Onshelf Items with Local Holds:TEST...	pulllocal...	MAHS_KJ	OK	7/28/2...
List Onshelf Items with Local Holds:TEST...	pulllocal...	MAHS_KJ	OK	7/28/2...

28. View Result should be selected
29. Format Report should be selected
30. Click OK button

31. Notices will open ready to print, one page per student
  - If you selected to combine notices, then all items for a user will be on the same page
  - If you did not combine notices, then each item will print on a new page



## Step 5: Check out materials to users

Check out items to user using WorkFlows, MobileStaff or BLUEcloud.

Friday, December 18, 2020 **One Notice Per Item Sample**

Test Library 1 - DO NOT DELETE

TODD, Abby  
104  
CRAIGO L

"PICKUP NOTICE"

The item you requested is available for pickup from the Library. Contact the Circulation Desk to check out the item.  
Thank you.

- 1 Is the cat dreaming your dream?  
Hyde, Margaret O. 1917-  
call number: 154.6 HYD 14  
Pickup by: 01/04/2021

Friday, December 18, 2020 **Combined Notices Sample**

Test High School - DO NOT DELETE

TODD, Abby  
104  
CRAIGO L

"PICKUP NOTICE"

The item you requested is available for pickup from the Library. Contact the Circulation Desk to check out the item.  
Thank you.

- 1 Dog Owner's veterinary guide  
Stamm, G. W  
call number: 636.7 STA 14  
Pickup by: 01/04/2021
- 2 Wiener dog art  
Larson, Gary  
call number: 741.5 LAR 14  
Pickup by: 01/04/2021
- 3 Is the cat dreaming your dream?  
Hyde, Margaret O. 1917-  
call number: 154.6 HYD 14