



Handout:

Using Item Search and  
Display and Place Hold  
in WorkFlows

# Contents

|  |    |
|--|----|
| Introduction.....  | 3  |
| A review of terms.....                                     | 3  |
| Item Search and Display .....                              | 3  |
| Place Hold.....  | 8  |
| Moving between Item Search and Display and Place Hold..... | 10 |
| Using the Place Hold wizard first.....                     | 10 |
| Using the Item Search and Display wizard first .....       | 11 |
| Display User Holds.....                                    | 12 |
| Modify Holds for User.....                                 | 13 |
| Remove User Holds .....                                    | 14 |

## Introduction

We will first introduce you to the **Item Search and Display** wizard and help you get familiar with where different types of information are located on the screen, because WorkFlows does pack quite a bit of information onto its two main screens, the **Search** screen and the **Detailed Display** screen. We will not be going into detail about the many ways that you can conduct your search.

Next, we will show you how to use the **Place Hold** wizard, which is much simpler.

Then, we will combine the two and demonstrate a couple of strategies for finding an item for a patron and placing the item on hold.

Finally, we will show you how to display a patron's holds, modify them, and delete them, when necessary.

In this online training session, the examples I use will usually not match what you see in your handout even though the examples in the handout are correct.

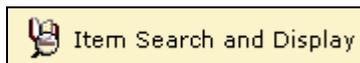
## A review of terms

The name of a work, regardless of the form that the work takes, is the **title**.

A title can exist in various forms, and these are called **items**. So, for example, *Playing for Pizza* by John Grisham can exist as a first edition hardcover, a paperback, a book-on-CD, a downloadable audio book, or a version that is a translation into another language. Each of these is an item.

Finally, a library may own more than one **copy** of an item.

## Item Search and Display



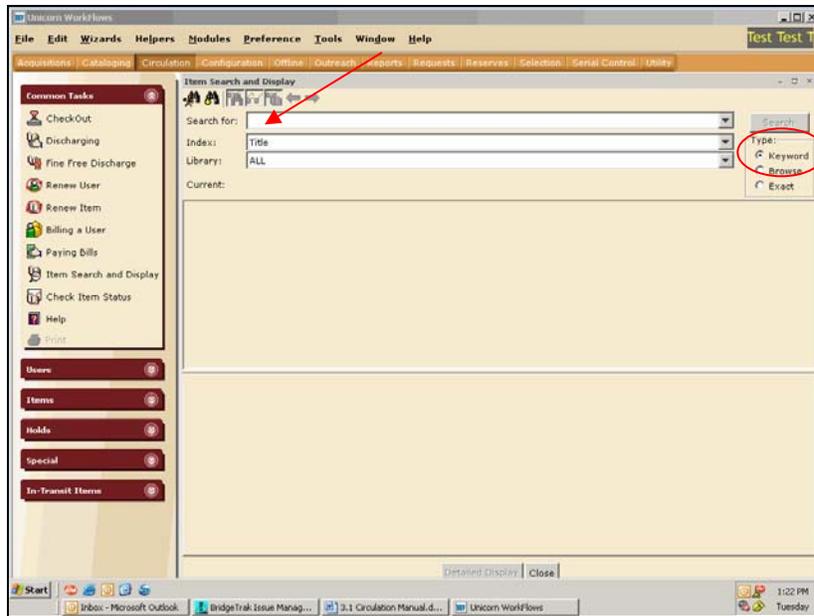
**Keyboard shortcut: F 4**

You can use the Item Search and Display wizard to search for an item within the entire SAILS system and display its bibliographic information, call number, and item information, such as circulation, billing, checkout, and holds information. One thing that you cannot do is edit information in Item Search and Display.

Here is how to search for an item:

1. Click the **Item Search and Display** icon in the Common Tasks group of wizards.

The **Search** screen appears:

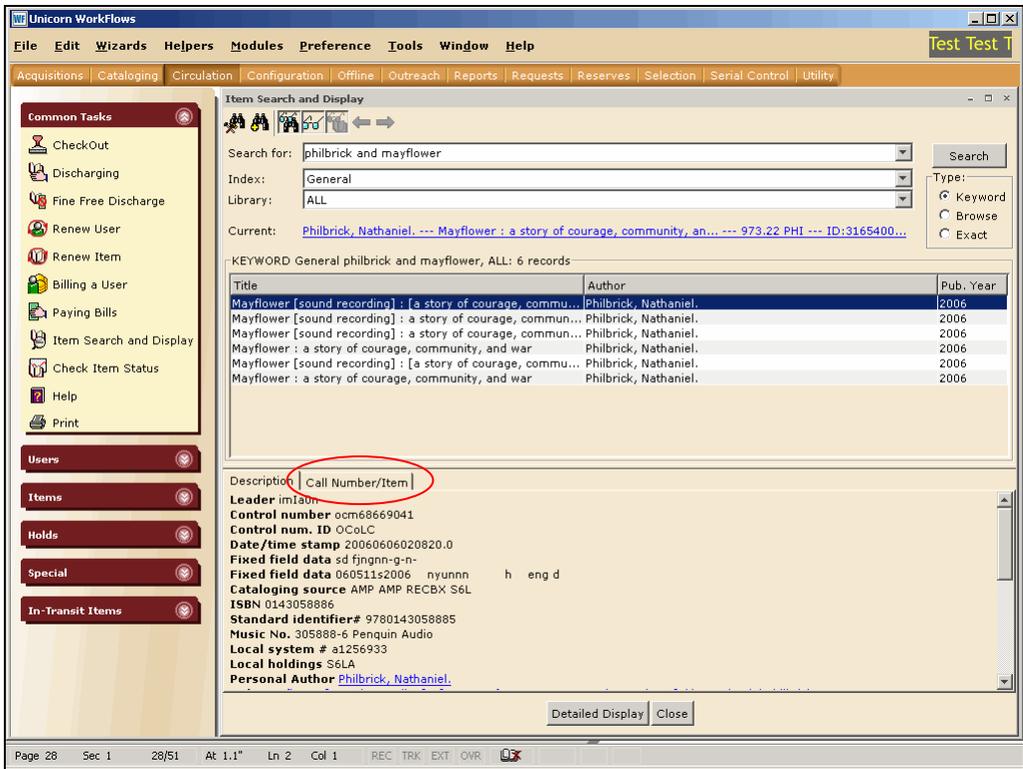


At the top is the **Search For** field, where you can enter your search terms; an **Index** field in which you can select to search by title, author, subject, item ID, etc., and the **Library** field, where you can choose to search in all libraries or just limit your search to books that your library owns.

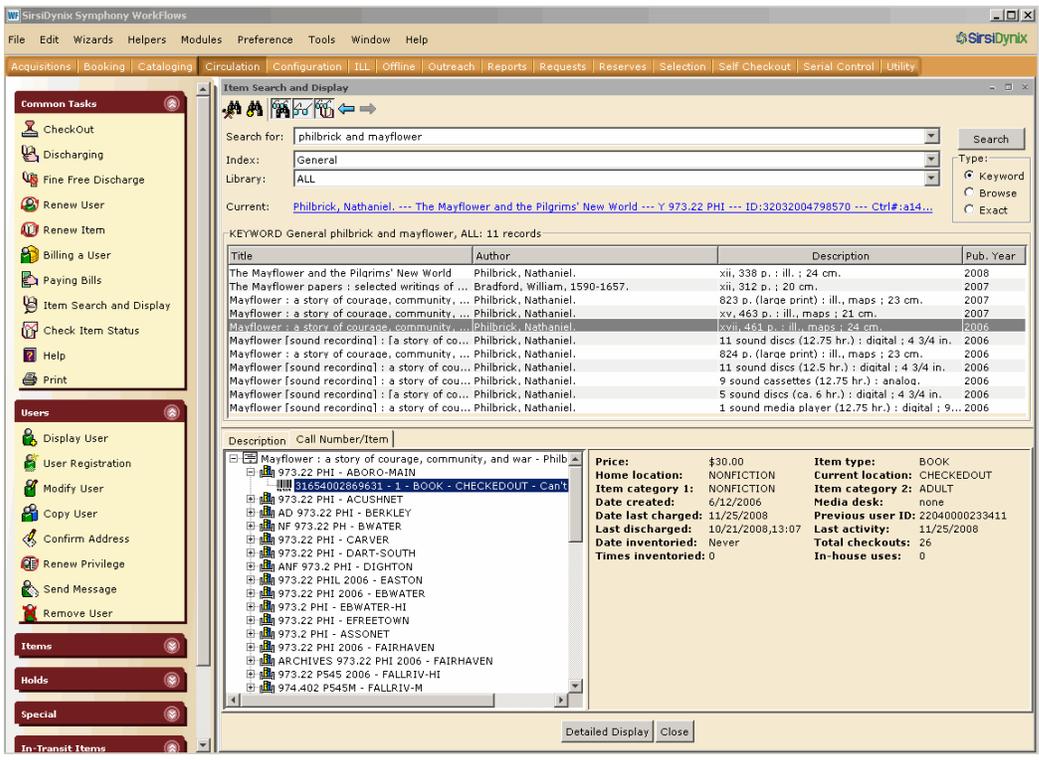
To the right, you can choose to search by **Keyword** or to do a **Browse** search.

- The Keyword search option locates and displays records that contain the terms you entered.
  - The Browse search option produces a list in the alphabetic vicinity of the term you typed.
2. Enter your keywords in the **Search for** field.
  3. Select **General** in the **Index** field to conduct a search for keywords that may appear anywhere in the item record. To search for an author, select **Author**; to search for a word in the title, select **Title**.
  3. Click the **Keyword** radio button in the **Type** area.
  4. Click the **Search** button.

Each item that WorkFlows find in the system appears in a list below the search fields. Below the list of items, tabs for description and call number/item information contain information for each highlighted item.



- Highlight one of the items and click the **Call Number/Item** tab to display copy information for that item.



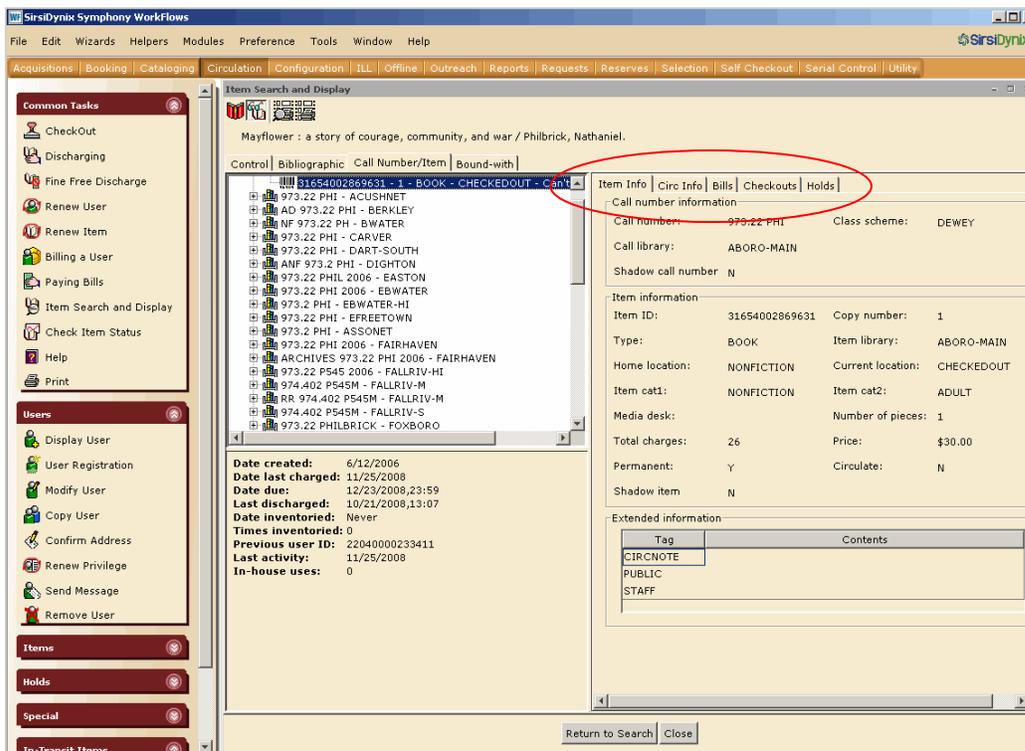
To expand or collapse the list in the Call Number/Item tab, right-click the **title**, and click **Expand** or **Collapse**.

- Expand the list under the **Call Number/Item** tab and highlight a **copy**.

On the right side, WorkFlows displays mostly circulation information about the copy, such as date last discharged, home location, current location, and total checkouts.

- Click the **Detailed Display** button at the bottom of the screen to show the **Detailed Display** screen.

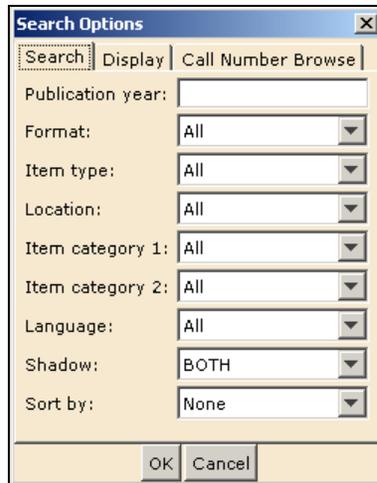
Ignore all the tabs on this screen except the **Call Number/Item** tab.



- Click the **Call Number/Item** tab and expand the list.
- Click the **Bills** tab to view any bills associated with this copy that you had highlighted; click the **Checkouts** tab for information on who the copy is checked out to, or click the **Holds** tab to view information on all the holds placed on this copy.

## The Configure Options helper

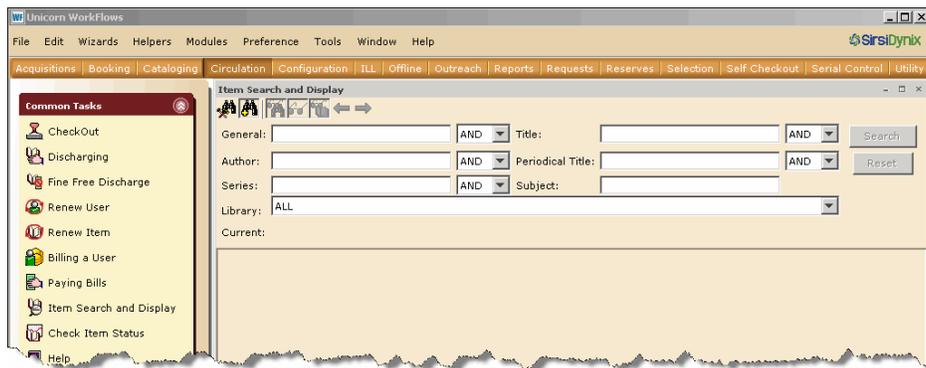
Use the **Configure Options** helper to add search options or change the way the results display. 



## The Advanced Search helper

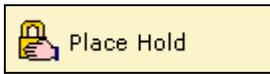
Use the **Advanced Search** helper if you have more one than type of keyword. 

1. Click the **Advanced Search** helper. The following screen appears:



2. Enter keywords in the appropriate fields.
3. Select **And**, **Or**, or **Not** from the drop-down list.
4. In the **Library** field, select a library.
5. Click the **Search** button.

# Place Hold



Keyboard shortcut: **F 9**

To place a hold on an item:

1. In the **Holds** group of wizards, click the **Place Hold** wizard. The following screen appears.

A screenshot of a web-based application window titled "Place Hold". The window has a light beige background and a standard toolbar at the top with icons for home, back, forward, and search. The main content area is divided into several sections: "User information", "Item information", "Identify User", "Identify item", "Hold Info", and "Level/Range". The "Identify User" section has a "User ID:" text box and a "Current:" button labeled "Patron, D 4444". The "Identify item" section has an "Item ID:" text box and a "Current:" button labeled "Dying for dinner FIC BLISS (PBK) 31656003213982". The "Hold Info" section includes a "Pickup at:" dropdown menu set to "ACUSHNET", an "Expires:" date picker, a "Comments:" text box, a "Date suspended:" date picker, and a "Date unsuspended:" date picker. The "Level/Range" section has radio buttons for "Level:" (Copy, Title) and "Range:" (Library, Group, System). A checkbox labeled "Make hold first in queue" is at the bottom left. At the bottom of the window are six buttons: "Get User Information", "Get Item Information (b)", "Place Hold", "Place Hold for Another User (g)", "Clear (t)", and "Close".

2. Scan the patron's library barcode or click the **Current User** button.

3. Click the **Item Search** helper. 

4. Conduct a search for the item.

5. Verify that you have found the item that the patron wants, highlight it, and click **Place Hold**.

Usually, you will be placing a title specific hold, so you do not need to select a particular copy of an item.

The Place Hold screen appears and contain the item information.

In the **Hold Info** area of the screen, the pickup location defaults to the library where the patron placed the hold. Verify the pickup location and add any comments or information on suspending / unsuspending the hold.

In the **Level/Range** area, select the level and range.

- The default should be **Level = Title** and **Range = System**. A Title/System hold places the hold on any available title within SAILS.
- Selecting a Copy level/System range hold places the hold on one specific copy.

6. When you finish selecting information in the Place Hold wizard, click **Place Hold**.

Next, a screen appears that confirms that the hold has been placed.

You may notice that the Item ID displayed in the confirmation screen does not match the one that appeared in the Place Hold wizard when you placed the hold. If you placed a Title level hold, this is to be expected. When you place a Title level hold for one of your patrons, if your library owns a copy of the item and the copy is available, WorkFlows selects that copy to fill the hold. Otherwise, WorkFlows assigns a copy from another library to fill the hold. Either way, the copy may not be the copy you highlighted when you placed the hold for the patron.

# Moving between Item Search and Display and Place Hold

Sometimes a patron comes up to the circulation desk and asks if you have a particular item in your library. You would search for the item and, if you didn't have it, the patron may ask to place it on hold and obtain it from another library. That is, you may need to search for an item to put on hold first and then ask for their User ID.

At other times, you may be checking out items for a patron and they may then say that they want to place a hold when you are done checking out the items. That is, you may already have their User ID and you now need to search for and place the hold.

Whatever the case, you will be using both the Item Search and Display and the Place Hold wizards. There are two ways to approach this:

- **Go to the Place Hold wizard first**, then search for and select the item using the Item Search and Display helper, and place it on hold. This is the easiest way.
- Search for and select the item in the **Item Search and Display wizard first**, then go to the Place Hold wizard and place the item on hold. This involves an extra step in Item Search and Display.

## Using the Place Hold wizard first

1. Click the **Place Hold** wizard.
2. Scan the patron's library barcode or click the **Current User** button.
3. Click the **Item Search** helper. 
4. Search for the item.
5. Highlight and verify that you have found the item that the patron wants, and click **Place Hold**.
6. Verify the pickup location and add comments or suspension information, if necessary. Make sure **Title** and **System** are selected.
7. Click the **Place Hold** button.

## Using the Item Search and Display wizard first

1. Click the **Item Search and Display** wizard.
2. Search for the item.
3. Highlight one of the items in the search results and, if necessary, click the **Description** tab to verify information about the item. You will usually be placing a **Title/System** hold, so you do not need to select a specific copy that is available.
4. Click the **Detailed Display** button at the bottom of the screen. This makes the item the current item.
5. Click the **Place Hold** wizard.
6. Scan the patron's library barcode or click the **Current User** button, as appropriate.
7. Verify the item in the **Current Item** button and then click the Current Item button.
8. Verify the pickup location and add comments or suspension information, if necessary. Make sure **Title** and **System** are selected.
9. Click the **Place Hold** button.

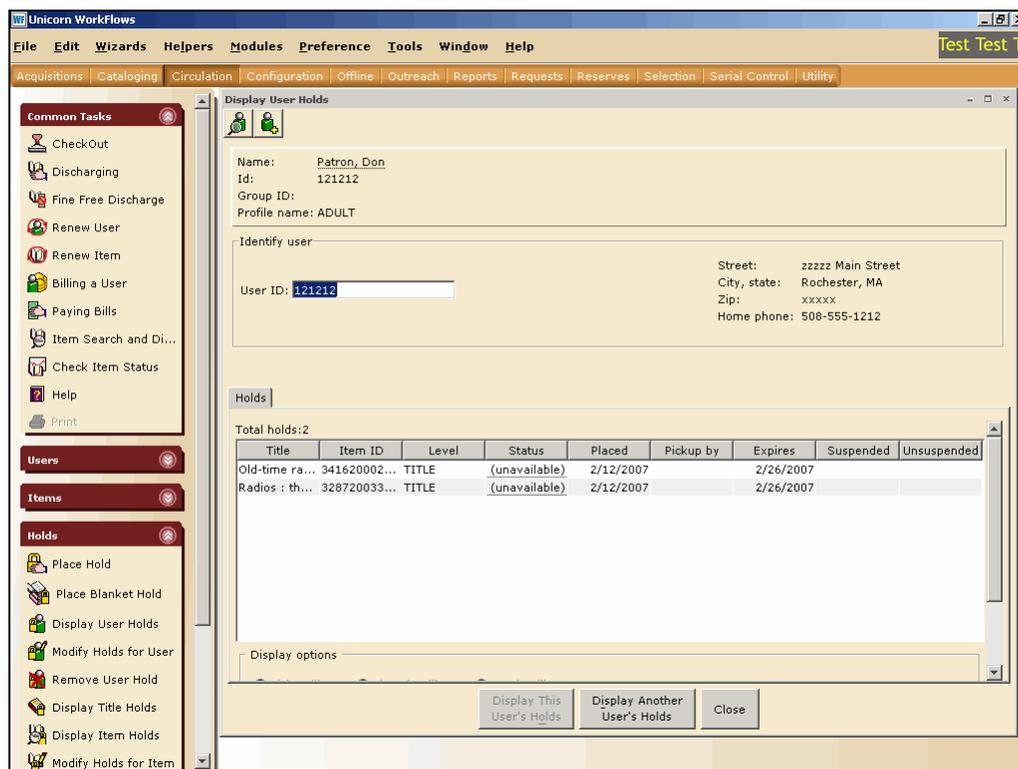
# Display User Holds



Use **Display User Holds** to display information about the items a patron has placed on hold, such as date the patron placed the hold, the date the hold expires, the suspended date and the unsuspended date.

To view a patron's holds information:

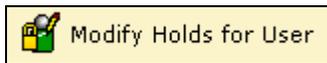
1. Click the **Display User Holds** icon in the **Holds** group of wizards.
2. Scan the patron's library barcode.
3. Click the underlined **Status** for the item and view the glossary for more information.



Tips on viewing a patron's holds:

- If you are checking out a patron's items, you can click the **Display User** helper , then click the Holds tab.
- When displaying a patron's holds, if you set the **Type of Hold** field (near the bottom of the screen) to INACTIVE, WorkFlows lists any holds that are EXP\_ONSHELF (were not picked up), EXPIRED, or CANCELED. The system automatically supplies this information.

# Modify Holds for User



Use the **Modify Holds for User** wizard to change the pickup location or expiration date of a hold or to suspend or unsuspend the hold.

1. Click the **Modify Holds for User** icon in the Holds group of wizards.
2. Scan the patron's library card barcode.
3. Check the check box in the Modify column next to the item or items you want to modify. Check the **Select All** box to select all the items.
4. Click the **Modify** button.

A screenshot of a software dialog box titled "Modify Holds for User : Patron, Don". The dialog box has a light beige background and a thin border. At the top, it says "Modify Holds Fields". Below this, there are three radio buttons: "Allow Recall", "No Recall", and "Recall now (RUSH)". Underneath are four input fields: "Pickup at:" with a dropdown arrow, "Expires:" with a date picker icon, "Date suspended:" with a date picker icon, and "Date unsuspended:" with a date picker icon. Below these is a "Comment:" section with three radio buttons: "Append", "Replace", and "Remove". At the bottom of the dialog box are two buttons: "OK" and "Cancel".

5. Make the necessary changes or add comments, and click **OK**.
6. Click **Close**.

When working with suspended holds, keep the following in mind:

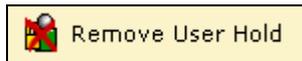
- When you suspend a hold, the suspension period begins at 00:01 on the suspended date and ends at 00:01 on the unsuspended date.
- If the suspended date is in the future, the system will attempt to fill the hold until the suspended date.
- When the suspended date is reached, the system does not attempt to fill the hold. The system will not try to fill the hold again until the unsuspended date is reached. While a hold is suspended, the hold's position in the hold queue does not change.
- If an available hold is suspended, the hold is no longer available, and the item trapped to fill the hold will become available to fill other holds.
- When the hold becomes unsuspended, the hold will be at the top of the hold queue provided another hold with higher priority has not been placed.

- If you enter NEVER in the unsuspended date field, you can suspend the hold indefinitely, provided the expiration date is set to NEVER.
- You can set the suspension beginning or ending date to the current date by entering TODAY.
- To unsuspend a hold on the date it was suspended, select the **No Date** button in the gadgets for both the **Date Suspended** and the **Date Unsuspended** fields. The word **Never** will appear in both fields.
- If a hold is suspended while the item is in transit to the pickup library, the result is similar to what happens when a hold is removed on an item in transit.

Suspended holds display in the **My Account** display in iBistro with the date the hold was suspended being preceded by a \$.

| Holds                    |   |                     |
|--------------------------|---|---------------------|
| Cancel                   | Title   | Availability        |
| <input type="checkbox"/> | Fire sale   | Pending \$ 6/3/2005 |
| <input type="checkbox"/> | The singularity is near : when humans transcend biology | Pending             |
| <input type="checkbox"/> | Hotel Rwanda [videorecording]                           | Pending             |

## Remove User Holds



Use the **Remove User Holds** wizard to remove one or more holds from a patron's record.

1. Click the **Remove User Hold** wizard in the Holds group of wizards.
2. Scan the patron's library card barcode.
3. Check the check box in the **Remove** column next to the item or items you want to remove. Check the **Select All** box to select all the items for removal.
4. Click the **Remove Holds** button. WorkFlows deletes the patron's hold.