

PALS Plus Holds

Daily Morning tasks:

Onshelf Hold Item List

- a. Log into Workflows with username: REPORTS, password: REPORTS
- b. Locate your library's most current report, and open it.
- c. Items on report are listed in call number order. Note location fields.
- d. All items on this report should be on the shelves in your library—they are only listed if the system shows them to be on the shelf.
- e. Pick up each item, and use the "Trap hold" wizard to print hold slips and either "Make available" if hold is being picked up at your library or activate the transit status if item is shipping to another library.
- f. Use the MISSING ITEM wizard to mark items missing if they are not found on shelves. This will move the hold to another library if copy exists elsewhere. If this is the last item and other editions exist—make note to notify patron that holds is being placed on an item that can fulfill their hold, and follow through later.
- g. Package items that are going to other libraries, and place in crate for delivery service. Gang items in bags. Count bags for shipping log.
- h. Call patrons for items that are being picked up in your library, letting them know when they can pick up the item and date it will no longer be held for them. Until further notice, person who placed hold must pick it up, especially if item comes from another library. Tag the item with last name and date notified, and place on Available Holds shelf near the circ desk.
- i. Each day, remove the report from the previous day.
- j. Each day, remove items from the hold shelf that have been there for more than 3 days. Remove the hold in the system to move the hold to the next waiting patron.
- k. Report is created 2x/daily, early morning and noon, in case you were unable to get to morning list.
- l. RECEIVE ITEMS from transit—some will be your library's items returning home to be shelved; others will be arriving to fill holds. Unwrap item and use "Receive Transit" wizard. Follow instructions on screen and keep slip with item. If item is filling a hold, patron will be notified. Contact info will be on slip. Follow same procedure as in (h) above.

Throughout the day:

As patrons return items and these are discharged, any holds are trapped, and a slip will print accompanied by an alert on the screen. Place these items in an area where they can be processed into one of the two hold areas: items going to other libraries, and items going on your Available Holds shelf. When time permits, before the end of the day, follow appropriate steps for each, as in steps (g) and (h) above.

Weekly:

Watch for reports pertaining to holds in Workflows Finished Reports. They are “Transits to [YOURLIBRARY] over 30,” and “Transits from [YOURLIBRARY] over 30.” You can also see these and perhaps keep better track of them if you use the “Pending Transits” wizard. Do analysis to find out why these are “stuck in transit.” If items are not on shelf, email sending or receiving library and ask them to check their shelves. Communication goes a long way in resolving these issues. Do not wait too long to follow up on these. If they are not found, mark them as MISSING.

Holds in Danger [of expiring]: This is another hold report that must be monitored. Analyze items on this list to determine why they are outstanding. Take action on each item—it could simply be a very popular item and your library has only one copy—in this case, extend the hold before it expires (generally, holds expire in 90 days; this report shows items about to expire in 4 days). Otherwise, search your shelves and see if the item is there (perhaps it was overlooked in the initial search). Either extend the hold, or notify the patron that the item is unavailable. Offer another edition if one is available in the consortium, and assist the patron by placing the hold.

Remove old reports pertaining to holds—keep only one current of each report.