Placing holds

Course description

This course is intended for staff at member libraries who assist patrons with placing holds either on their behalf or by explaining to patrons how to place holds themselves. Placing holds from both the patron record and bibliographic record will be covered, as well as placement of holds at the item or title level.

Topics covered include:

- Holds workflow process
- Place holds for patrons in WMS Circulation from:
  - Patron record
  - Bibliographic item record
- Place holds at the item and title level
- Recalls related to hold request
- Using the staff interface, edit pickup location, suspend dates, and hold end dates, and if appropriate, move patron to top of hold queue
- Check in an item that has a hold
- Place and edit holds from WorldCat Discovery

Circulation supervisory staff, as well as circulation person-in-charge staff should be versed in this information. Key circulation staff who handle daily circulation functions and assist patrons will need to know how to place holds for patrons. Any public service staff who directly assist patrons will benefit from knowing how to help patrons place and manage their own holds.

Register for live, online training

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View a recorded session

View a recorded session (50 minutes)
Course handouts

Class handout - Placing holds

Request closed captioning

Closed captioning is available in the US upon request with 5 business days' notice. To request closed captioning for a training session, please contact us at training@oclc.org.

Cancellation policy

In the event of low attendance, OCLC may cancel a training session. In this situation, registrants will be notified by email in advance of the session.