Group holds for group aware libraries

Last updated: Thu, 03 Oct 2019 13:32:17 GMT

Find information about the workflow for processing holds for patrons in group aware libraries. When you are a WorldShare Management Services library with Group Aware, patrons from any institution within the group can place holds on any items held by the group (depending on circulation policies). This functionality is called group holds. The workflow for borrowing and lending items among your group is outlined below. For more information, see Group aware for consortia.

Step 1: Patron requests an item in WorldCat Discovery

The workflow begins when a patron requests an item in WorldCat Discovery, depending on your configuration.

Note: The patron needs to be using their home institution's instance of WorldCat Discovery. If they are using another institution's instance, they will be unable to sign in to their account.

1. Locate the item in WorldCat Discovery.
2. Check item availability in the Item Detail view, under Availability / Holdings, expand the group to check item availability at other institutions in the group.
3. If at least one institution has the item, click Place hold.
   Note: Items can be requested through interlibrary loan for the fastest delivery if no institution in the group owns the item.
4. On the Sign in screen, enter a User Name and Password to sign in to their account.
5. On the Place Hold window, select a pickup location from the list.
6. (Optional). Select Set hold schedule (optional) to set a hold schedule for the item.
   a. To set a hold schedule, enter the start and end dates for the item's schedule period.
   b. To set a time the hold is not needed, enter the start and end dates for the period you are unable to pick up the item or do not need the item.
7. Click Submit.
8. A message indicates if the hold was successful. If the hold was unsuccessful, the system will display the reason why the hold failed (e.g. account expired, hold limit reached).
9. If the item was previously requested, a message will appear.

Step 2: Lending library pulls the item from the shelf and sends to borrowing library

The item appears on the Pull List for the lender if it is available. If the item is not currently available (if all copies are checked out), when the item is checked in, it will be sent to the patron's pick up location (instead of being reshelved).

Note: Items may not appear on your Pull List depending on your configuration for Hold Fulfillment Preferences.
Use the pull list to retrieve an item

1. On the left navigation, click Reports.
2. Click Pull List.
3. (Optional). Click a column heading to change the sort order of the Pull List.
4. Click Print in the upper right corner of the screen to print the Pull List.
5. Use the Pull List to retrieve the item from the shelf.

Check in the item

1. On the left navigation, click Check In.
2. In the Item Barcode field, scan or type the barcode.
3. Click Check In or press <Enter>.
4. Print the Routing Receipt that is generated.
5. Send the item to the requesting (borrowing) library.

Once the item is checked in, its status is updated to In Transit. The patron can see in their account in WorldCat Discovery that the item is being sent to their pickup location.

Step 3: Borrowing library receives item

The borrowing library receives the item from the lending library and library staff check in the item to fulfill the hold for the patron.

1. On the left navigation, click Check In.
2. In the Item Barcode field, scan or type the barcode.
3. Click Check In or press <Enter>.
4. Print the Hold Receipt that is generated.
5. Place the item and the Hold Receipt on the hold shelf for pickup.

Once the item is checked in, the patron's hold request is updated to On Shelf and the item's status is updated to On Hold, which is reflected in:

- The patron's account in WorldCat Discovery - The patron can see that their item has arrived and is ready for pickup.
- The Circulation module - Circulation staff will see that a hold is ready for pickup when the patron arrives.
- The Hold Pickup Notification - The system generates a pickup notification to be sent to the patron by email. This notification is queued in the email system, which typically delivers mail every day around 7:00 AM. The Hold Pickup Notification comes from the owning (lending) institution. See Item and Loan Policies for details.

Step 4: Borrowing library checks item out to patron

When the patron arrives to pick up the item, library staff check out the item to the patron.
1. On the left panel, click **Assist Patrons**.
2. In the **Enter barcode** field, scan or type the patron's **barcode**.
3. Click **Go** or press `<Enter>`.
4. In the patron's account, on the Checkout tab, in the **Enter barcode** field, scan or type the item's **barcode**.
5. Click **Go** or press `<Enter>`.
6. The item is checked out to the patron. The loan period of the item depends on the owning institution's circulation policies. See [Item and Loan Policies](#) for more information.

**Step 5: Patron returns item and borrowing library checks in item**

When the patron returns the item, library staff check in the item. **Note**: If the item is put on hold by another patron, the first item checked in will fulfill the hold.

1. On the left navigation, click **Check In**.
2. In the **Item Barcode** field, scan or type the **barcode**.
3. Click **Check In** or press `<Enter>`.
4. Print the Routing receipt that is generated.
   - The item will route to different libraries until there are no more holds on the title.
   - Once the last patron has returned the item, and library staff have checked it in, the item will return to the owning library.
5. Send the item back to the library indicated on the Routing Receipt (the owning library or to a library within the group for pickup).