

## Check-in functions:

1. Check-in is the most useful function of the system
  - A. Return the items
  - B. Receive the item
  - C. Check the status
2. If you have a question about what an item is doing...**CHECK IT IN**

## Check out to a patron:

1. Select circulation from the top menu or the gray flag menu.
2. Select check out
3. Scan patron barcode OR type patron last name and first 3 letters of first name. Scan to find your patron.
4. Check address to verify you have the right person, click name or barcode
5. Your patron info should fill the screen.
6. Put cursor in box. Scan item barcode
7. NOTICE the checkouts change below.
8. When transaction is complete, print slip if needed.

Look to the left sidebar for more patron details.

Update  
expiration  
dates in  
message box

## Place a hold for a patron:

1. Click Search on the top menu
2. Search for the item
3. Locate the record you want to place the hold on. Click on the title to open the next screen
4. Double check the record, is this the correct format, title, etc.
5. Look at top of record for place hold (right side last button)
6. Put cursor in search patron box
7. Type in patron last name, first 3 of first or Barcode
8. Verify name is correct
8. Select pickup location
9. Add note and expiration date if it applies
10. Place hold—yellow button.

**Double check  
pick-up location**

## Delete a hold:

1. Search for patron name with barcode or last name and first 3 of first
2. Scroll to tabs at bottom
3. Find Holds tab-click to open
4. Delete yes/no
5. Select correct yellow button to save the action

## Suspend a hold:

1. Search for patron name with barcode or last name and first 3 of first
2. Scroll to tabs at bottom
3. Find Holds tab-click to open
4. Suspend? [click]
5. Add date to pop-up box
6. Select yellow suspend box to save action

**Resume Suspend hold—follow steps again and select resume**

## Run the Holds Queue Report:

1. Click into the circulation menu on the top
2. Look for holds, click on hold queue
3. Set the library to search, all other should say ALL
4. Submit
5. Use the cog to change the columns you want to see
6. Print if needed.

**Holds re-sort at  
6:50am and  
12:50pm daily**

## Pulling Holds:

1. Search for the item on the shelves
2. Check in the item [check the status]
3. Respond to the pop-up box
  - A. In-house hold: confirm and print slip
  - B. Transfer: Print slip, transfer, and confirm
4. Item goes to courier bag for transfer OR notify your patron item is available.

## Holds arrive on courier:

1. Open courier bags
2. Check in items [check status]
3. Respond to pop-up box
4. Notify patron item is available for check out.

### **Holds Awaiting Pickup Report:**

1. Click to open report
2. Holds waiting: These are holds for your patrons waiting to be picked up
3. Holds waiting past their expiration date: These are expired holds. Clean up by contacting the patron and/or cancelling the hold.
4. Holds with cancellation request: Patron initiated cancel. Clean up by removing from the holds shelf, check in item, cancel hold, reshelve item.

### **Q: I can't find an item on the shelf. Now what?**

A: Search for the item daily for 5 days. Mark the item **missing**. If you can not find your item and other libraries own it, mark it **missing** sooner to move the holds faster. [edit item: lost status: missing, save changes]

### **Q: My library owns the only copy and I can't find it. Now what?**

A. Mark the item **missing**, Notify the library of the patron by email. Patron's home library will remove hold and request on ShareIT.

### **Q: What if a hold is placed on a local item that does not circulate (devices, special collection, fragile, damaged, local history)**

A. Notify the library of the patron by email. Let them know that items does not circulate. Patron's home library will remove hold.

### **Q: When I check in the book, no hold pops up. What's going on?**

A. Many things can be happening:

1. Someone from another library beat you to filling the hold. Check this by looking at the holds page on the item record. Find on the left menu. The details column will have a barcode if the hold is filled.

2. Hold may be suspended. Check that by looking at the holds page on the item record. Find on the left menu. Button will say suspended.

3. Hold date changed to future. Check that by looking at hold page on the item record. Find on the left menu. The date column will show future date.

**Don't contact patrons from another library.**

**Always contact the library and they will take action with their patron.**

### **Q. My patron has been waiting for a bit now, book has not arrived. What's going on?**

A. Check the item record. Has someone marked it missing and forgotten to notify you? Is it in transit for an extra long time? If a hold is more than a week old with no action, contact the lender/owning library. Communication is the key to problem solving.

### **Q. Patron returned an item incomplete. What now?**

A. Sometimes a disk is missing or a cord and that's alright, we need it noted. Contact your patron to rectify the situation or notify the library of the patron by email of the situation. Owing library will edit item to note the incomplete status and change it when it has been fixed. [edit item: lost status: incomplete, save changes]