Viewing and Printing RDS Reports, an Overview ........................................ 2

Pull List Reports
  View and Print Your Most Recent Pull List .......................... 5
  Preview your Pull List ..................................................... 8
  Search your Pull List ...................................................... 9
  Process and Ship Books .................................................. 10
  Cancel Holds for Items with Pickup in your Library or
    a Library on Your Campus ........................................... 12
  Charge Missing Books to your Missing User. Cancel the
    Hold if it’s a Single Copy Item .................................... 14

Clear your Hold Shelf Reports
  Print Your Most Recent “Clear Your Hold Shelf” Report .......... 19
  Remove Items from your Hold Shelf, Process, and Ship Books .... 20

Receiving RDS books from other Libraries ................................. 26

Checking out and Discharging Items with Holds at a Circulation Desk .... 27

Placing holds in WorkFlows on Noncirculating Items and on Another
  Library’s IN-LIBRARY items ........................................... 29

Procedures for reserve staff to place holds in Workflows .............. 31
Rutgers Delivery Service (RDS) staff will print and process three different reports: “Pull List,” “Clear Your Hold Shelf,” and new requests.

These reports are scheduled to run at specific times and results become available to staff as the times noted in the table below. The “Pull List” reports lists items with new holds for you to process. The “Clear Your Hold Shelf” reports lists items that have been on your Hold Shelf longer than 14 days for you to remove. The new request reports output one new request per page for you to process. The WorkFlows login (User ID and PIN) needed to view and print each report is also noted in the table.

Table 1. Rutgers Delivery Service Reports

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Run Time</th>
<th>Contents</th>
<th>Format</th>
<th>WF Login</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pull List <strong>NEW</strong></td>
<td>6:45 am and 2:00 pm</td>
<td>New holds for you to process. Generated from the [DELIVER/RECALL BOOK] form</td>
<td>A list of items, sorted by call number</td>
<td>HOLDREP</td>
</tr>
<tr>
<td>Clear Your Hold Shelf <strong>NEW</strong></td>
<td>7:00 am</td>
<td>Old holds on Rutgers materials, on your Hold Shelf 15+ days, for you to remove. Does not include ILL items.</td>
<td>A list of items, sorted by user name</td>
<td>Varies by library</td>
</tr>
<tr>
<td>New request reports, names vary by library (lib-req-time)</td>
<td>Varies by library</td>
<td>New requests for you to process. Generated from the [REQUEST ARTICLE/OTHER] form</td>
<td>One Request per page</td>
<td>Varies by library</td>
</tr>
</tbody>
</table>

The first two reports are cumulative. If you do not print and work on a “Pull List” or “Clear Your Hold Shelf” report, all items will appear on the next report. If you do not process a particular item on a report, it will appear on the next report. There will be no change in the new request reports; these reports are not cumulative and each one should be printed.
Do not be concerned if you miss a “Pull List” or “Clear Your Hold Shelf” report or don’t print these reports on weekends. Simply print and work on the most recent report available; it contains all items from the previous reports. And, you can go ahead and remove the older reports from the list of finished reports.

Libraries with high volume may choose to print their Pull List reports twice a day. Other libraries will print it just once a day. It all depends on volume, workload, staffing, Shipping’s RDS pickup time, time of the semester, etc. Libraries should print and process a “Pull List” and “Clear Your Hold Shelf” reports a minimum of once each workday.

If you long and don’t find a “Pull List” or “Clear Your Hold Shelf” report for your library in the list of Finished Reports on a given day/run time, it means there are no items waiting for you to pull or clear.

RDS staff who are accustomed to printing new requests one at a time (by using the display new request command), may continue to do so. But they will need to add the [FINISHED REPORT] wizard to their toolbar and start logging on to WorkFlows with the special pull list login (holdrep) to print their new “Pull List” report, and with a new assigned login to print their new “Clear Your Hold Shelf” report.

Table 2. Daily Schedule of Request Reports by Library

<table>
<thead>
<tr>
<th>Report name</th>
<th>Run Time</th>
<th>Login</th>
</tr>
</thead>
<tbody>
<tr>
<td>alchl-req-noon</td>
<td>12:00 pm</td>
<td>ALCNCIR1</td>
</tr>
<tr>
<td>alex-req-10am</td>
<td>10:00 am</td>
<td>ALEXREQ1</td>
</tr>
<tr>
<td>alex-req-2pm</td>
<td>2:00 pm</td>
<td>ALEXREQ1</td>
</tr>
<tr>
<td>camdn-req-8am</td>
<td>8:00 am</td>
<td>ROBECIR4</td>
</tr>
<tr>
<td>camdn-req-11am</td>
<td>11:00 am</td>
<td>ROBECIR4</td>
</tr>
<tr>
<td>chang-req-845am</td>
<td>8:45 am</td>
<td>CHANCIR1</td>
</tr>
<tr>
<td>dana-req-9am</td>
<td>8:57am</td>
<td>DANAREQ1</td>
</tr>
<tr>
<td>dana req-pm</td>
<td>12:57 pm</td>
<td>DANAREQ1</td>
</tr>
<tr>
<td>dglss-req-10am</td>
<td>10:01 am</td>
<td>DGLSCIR6</td>
</tr>
<tr>
<td>dglss-req-noon</td>
<td>12:01 pm</td>
<td>DGLSCIR6</td>
</tr>
<tr>
<td>dglss-music-req-10am</td>
<td>10:02 am</td>
<td>DGLSCIR6</td>
</tr>
<tr>
<td>dglss-music-req-noon</td>
<td>12:02 pm</td>
<td>DGLSCIR6</td>
</tr>
<tr>
<td>jazz-req-9am</td>
<td>8:59 am</td>
<td>DANAREQ1</td>
</tr>
<tr>
<td>jazz-req-pm</td>
<td>12:58 pm</td>
<td>DANAREQ1</td>
</tr>
<tr>
<td>klmr-req-9am</td>
<td>8:53 am</td>
<td>KLMRCIR3</td>
</tr>
<tr>
<td>klmr-req-pm</td>
<td>12:53 pm</td>
<td>KLMRCIR3</td>
</tr>
<tr>
<td>lsm-req-830am</td>
<td>8:30 am</td>
<td>LSMCIR3</td>
</tr>
<tr>
<td>lsm-req-1410</td>
<td>14:05 pm</td>
<td>LSMCIR3</td>
</tr>
</tbody>
</table>
### Table 3. Daily Schedule of “Clear Your Hold Shelf” Reports

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Run Time</th>
<th>Login</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clear Hold Shelf-ALCOHOL</td>
<td>6:25 am</td>
<td>ALCNCIR1</td>
</tr>
<tr>
<td>Clear Hold Shelf-ALEXANDER</td>
<td>6:26 am</td>
<td>ALEXREQ1</td>
</tr>
<tr>
<td>Clear Hold Shelf-ANNEX</td>
<td>6:27 am</td>
<td>ANXCIR1</td>
</tr>
<tr>
<td>Clear Hold Shelf-ART</td>
<td>6:28 am</td>
<td>ARTCIR1</td>
</tr>
<tr>
<td>Clear Hold Shelf-CAMDEN</td>
<td>6:29 am</td>
<td>ROBECIR4</td>
</tr>
<tr>
<td>Clear Hold Shelf-CHANG</td>
<td>6:30 am</td>
<td>CHANCIR1</td>
</tr>
<tr>
<td>Clear Hold Shelf-CHEMISTRY</td>
<td>6:31 am</td>
<td>CHEMCIR1</td>
</tr>
<tr>
<td>Clear Hold Shelf-DANA</td>
<td>6:32 am</td>
<td>DANAREQ1</td>
</tr>
<tr>
<td>Clear Hold Shelf-DOUGLASS</td>
<td>6:33 am</td>
<td>DGLSCIR6</td>
</tr>
<tr>
<td>Clear Hold Shelf-KILMER</td>
<td>6:34 am</td>
<td>KLMRCIR3</td>
</tr>
<tr>
<td>Clear Hold Shelf-LSM</td>
<td>6:35 am</td>
<td>LSMCIR3</td>
</tr>
<tr>
<td>Clear Hold Shelf-MATH</td>
<td>6:36 am</td>
<td>MATHCIR1</td>
</tr>
<tr>
<td>Clear Hold Shelf-PHYSICS</td>
<td>6:37 am</td>
<td>PHYSCIR1</td>
</tr>
<tr>
<td>Clear Hold Shelf-SMLR</td>
<td>6:38 am</td>
<td>ILMRTSEM</td>
</tr>
</tbody>
</table>
View and Print Your Most Recent Pull List

- Login to Workflows using the special Pull List reports login. If you are unable to connect, wait a few minutes and try again.

- Click on the Finished Report wizard icon.

- You will see all the libraries’ Pull Lists are in one list. Use the “Filter and Sort Reports” button on the Helper Bar to sort the lists by date. Locate and highlight the most recent Pull List report of your library.

- Click on VIEW.
- Remove the check mark in the box next to “View log.” Press “OK.”

- To print your Pull List report, click on the WordPad printer icon or select File/Print.
*If you have any problems printing your report, double-check your settings and Properties. Call Systems if you’re still unable to print.*

*You may remove your library’s old pull list reports at this time. Click on “Remove...4” at the bottom of the [FINISHED REPORT] screen, click on the box to the left of the pull List report you want to remove, and press “Remove...1”*

**VERY IMPORTANT** When you’ve finished printing your most recent Pull List and removing old ones, close WorkFlows and log out. The special Pull List report logon is a shared logon and should only be used to print and remove Pull Lists.
Preview your Pull List

- Scan the entries on your lists and highlight, circle, cross out or otherwise annotate all the entries with your library, or a library on your campus, as the “pickup” library.
Search your Pull List

- Search the stacks and retrieve remaining items on the list.
- Place a check mark beside, circle, or otherwise annotate the entries of items that you cannot find and are missing.
Process and Ship Books

- Bring found items back to a workstation.
- Logon to WorkFlows with your usual staff login.
- Click on the TRAP HOLD wizard.

- Scan each item’s barcode.
• Look at the screen under “Route/Transit to” and note the library.

• Fill out a “Ship to” slip and circle the library the item will be shipped to. [DO NOT fill in the user’s name on the bottom half of the “Ship to” slip; the receiving library will do that.]

• If the item is on hold for a RESV-library user, write the library’s name next to “RESV-“ and circle it on the “Ship to” slip.

• Insert the “Ship to” slip in each book.

• Press “OK” after scanning each item’s barcode; a list will form if you’re trapping more than one item.

• Sort books by pickup library, pack and ship. Pack and address items for the RESV-library users separate from the library’s regular RDS material.
Cancel Holds for Items with Pickup in your Library or a Library on Your Campus

- Bring your most recent annotated Pull List to a workstation.
- Logon to WorkFlows with your usual staff login.
- Click on the [REMOVE USER HOLDS] wizard. **Be sure to use Remove User.**
- Working from your Pull List, for each entry that has your library or a library on your campus as the “pickup” location, key in the user’s name or barcode. Press OK.
• Highlight the user’s name and select “Remove This User’s Holds” whenever you are presented with a List of Users.

• Review the list of user’s holds, and click the “Remove” box next to the item hold you want to cancel. Press “OK.”

The user will receive a notice informing them their hold has been canceled.
Charge Missing Books to your Missing User.
Cancel the Hold if it’s a Single Copy Item

Bring your most recent annotated Pull List to a workstation.

Logon to WorkFlows with your usual staff login.

Click on the CHECKOUT wizard.

Enter your MISS-LIB user in the user ID field, press OK.

Key in the missing item’s barcode in the item ID field, press OK.
• You may see an “Item is Needed at Another Library” or “Item Has Holds” window.

• Enter the override and click on the “Release” and/or “Override and Checkout” button.
• Determine if the item is a single copy. Click on the [ITEM SEARCH AND DISPLAY] wizard.

• Click on the “Current Title” radio button (the item info should carry over). Press “OK.”

• Click on the “Vol/Copy” tab.

• If there are multiple circulating copies of the item, do not cancel the hold. The hold will appear on another library’s Pull List the following day, or it will enter a hold queue for recalling one of the other copies.
• If there is only one circulating copy of the missing item, you need to cancel the hold.

• Click on the [REMOVE ITEM HOLD] wizard. **Be sure to use Remove Item.**

• Click on the “Current Copy” radio button (the item information should carry over), and press “OK.”
• Click on the box in the “Remove” column, press “OK.”

• A “Holds Removed” screen appears, press “OK.”
Print Your Most Recent “Clear Your Hold Shelf” Report

- Logon to WorkFlows with your “Clear Your Hold Shelf” login
- Click on the [FINISHED REPORT] wizard.
- Highlight your most recent “Clear Your Hold Shelf” report.
- Click on “View,” remove the check mark next to “View Log,” press OK.
- Click on the WordPad printer icon or select File/Print.

- Previous “Clear Your Hold Shelf” reports may be removed.
Remove Items from your Hold Shelf, Process, and Ship Books

- Take the report list to your Hold Shelf, search under user’s name and pull books off the shelf.

- Take books to a workstation and logon to WorkFlows with your usual staff login.

- Right-click on your [REMOVE ITEM HOLD] wizard and double-check the Properties. In the Defaults tab, under “Preferred search index” be sure “Item Barcode” is selected. Under “Remove All/Selected Holds default” be sure the radio button next to “Selected” is selected. Press “OK.”
• Click on the [REMOVE ITEM HOLD] wizard.

• Scan the barcode the book of the book you’re removing from your Hold Shelf.

• Click in the box under the “Remove” column, press “OK.”
• When removing an item from your Hold Shelf that is not on hold for someone else (i.e. has no queued holds), you will see a “Remove Item Hold: Put in Transit” window.

• Click on the “Put in Transit” button at the bottom of the screen.

A “Remove Item Hold; Route Item” window then appears.

• Note the library where the item is going in the “routing information, route to:---" area. Fill out a “Ship to “ slip circle the library.

• Click on “OK.”

• Sort, pack and ship the books.

NOTE: If the item is routing to your library, discharge it to give it an “In Library” status, and set it aside to shelve in your stacks.
• When removing an item from your Hold Shelf that is on hold for another borrower (i.e. has queued holds), you will see a holds queue on the “Remove Item Hold” screen.

• Click in the box under “Remove” next to the available hold, the one on your Hold Shelf. Press “OK.”
• A “Remove Item Hold: Put in Transit” message appears, prompting you to put the item in transit for the next user in the hold queue.

• Click on the “Put in Transit” button.

• A “Remove Item Hold: Route Item” screen appears.

• Fill out a “Ship to” slip; circle the “route to:” library. [DO NOT fill the in user’s name on the bottom half of the “Ship to” slip; the receiving library will do that.] If the item is on hold for a RESV-library user, write the library’s name next to “REVS-“ and circle it on the “Ship to” slip. Insert the “Ship to” slip in each book.

• Press “OK.”
• A “Remove Item Hold: Holds Removed for …” screen appears. Press “OK.”

NOTE: If the item is routing to your library for a hold, discharge it to make the hold available, fill out the bottom half of a “Ship to” slip with the user’s name and insert the slip in the book. Shelve the book on your Hold Shelf.
Receiving RDS Books from other Libraries

- Logon to WorkFlows with your usual staff login.

- Select the [DISCHARGE] wizard, scan the item’s barcode.

- Flip the item’s “Ship to” slip around and fill in the Last/First name of the user who the item is on hold for, and your initials. [The 2-wk pull date is optional since “Clear Your Hold Shelf” reports will automatically alert you when it’s time to remove an item from your Hold Shelf.]

- Press “OK.”

- Shelve the item, in alphabetical order by the user’s last name, on your Hold Shelf.

- Use the [CHECK ITEM STATUS] wizard to investigate any problems.
Checking out and Discharging Items with Holds at a Circulation Desk

- Occasionally a user finds a book in your stacks that has a hold on it already and brings it to the circulation desk to check out before RDS staff has had a chance to retrieve and process it. A user may come in to pick up an item that’s being held for him, and the item has queued holds (i.e., other users are lined up to get it). In both cases, the user will receive a shortened, 14-day loan period.

- Check out the item.

- When the “CheckOut: Holds Block Override” screen appears, key in the override and click on the “Override & Checkout item” button.

- A “Checkout: Alert” window pops up. Verbally alert the patron that they have a shortened loan period (2 weeks) and to expect a recall notice the following day, because it’s a high demand item with a holds queue.

- When discharging recalled items at the circulation desk, be alert to hold available and transit messages.
- Use the [CHECK ITEM STATUS wizard to investigate problems.
Placing a Hold in WorkFlows on an Item that does not Circulate and on an IN LIBRARY Item in Another Library

- You will receive the error message “[DELIVER/RECALL BOOK] can not be used for this item” when attempting to place a hold in WorkFlows:
  - on an item that does not circulate in your collection (for example, when placing a hold on a REF item to send to a geographical campus for 3 days in library use)
  - on an IN LIBRARY item in another library (for example, when requesting items for reserves using your RESV-library user).

- On the “Place Hold” screen make sure to check that both the “Title” level and the “System” range radio buttons are selected.

- Click “OK.”
• Enter the override when prompted with the message: “Override required to place SYSTEM-range hold” and click on “Override & Deliver/Recall Book”

• A “Deliver/Recall Book complete” screen appears
Procedures for reserve staff to place holds in Workflows

To request an item through RDS/Recall, we will be placing requests directly through Workflows. We cannot place requests through Webcat because there is no place for a “comment” field needed to record professor and course information. This information can be entered into the comment field in the create hold process in Workflows.

Set properties on your PC for the “place hold” wizard. Make sure to select “title” level hold, and “allow recall” in their perspective fields. Logoff Workflows, answer YES to the “PROPERTIES HAVE BEEN CHANGED SAVE CHANGES” message. Update the properties on all PC’s that are used for reserve use.
1. Click on the “place hold” wizard

2. Enter RESV-LIB for the first screen “Place hold, lookup user”

3. Enter title, select correct item from list, click on “place hold”
   LEAVE the EXPIRATION DATE blank. *We should never enter an Expiration date when placing holds.*

4. Select pick up location (your library)

5. Fill out comment field. This should include the following information, in the following order:
   professor, course <##:###:###:##(LIB)>, semester(fal02), your initials.

6. Click on “OK”

**When the items are received:**

1. Reserve material will come directly to reserve staff at your unit. Items will have a hold on them for “RESV-LIB”

2. Reserve staff, in order to determine which course/professor requires the item, will need to “Display Item Hold” on the item. This will display the comment field you entered when placing the hold. **If you charge the item to RESV-LIB without checking the comments field first, you will lose this information.**
3. Reserve staff will discharge the item, making it available.

4. Reserve staff will then fulfill the hold by charging the item to: RESV-LIB, and then proceed with the create reserve process.