CROSS-DEPARTMENTAL BIB-LEVEL HOLD WORKFLOW

Bib-level holds are placed on records that DO NOT have attached item records. These are typically placed on items that have a status of ON ORDER or IN-PROCESS. The contact department for ON ORDER requests is Acquisitions (Library.Acquisitons@dartmouth.edu) and for IN-PROCESS items is Cataloging (Library.In.Process.Requests@Dartmouth.EDU).   This document will outline the workflow across departments when a request comes in for both types of items - ON ORDER and IN-PROCESS.

ORDER-NON-RUSH*   ORDER-RUSH*   IN-PROCESS-NON-RUSH*   IN-PROCESS - RUSH*

ON ORDER OR NEW ORDER

NON-RUSH

Request from Selector TO ORDER or ON ORDER

Acquisitions is notified that an order should be initiated and a **bib-level hold** is placed on the item for the selector **at the time of the order**

When item is received, **add receive date** to order. A bib level hold box will pop up, click okay.

Put a **green "bib-level hold"** slip in item

Send to Cataloging "in-process" area to catalog

Request from Acc Ser for ON ORDER item

In Bib record, **Access Services** staff choose Bib-level hold tab, add patron, select pick-up location and not-wanted-after date (24 months?)
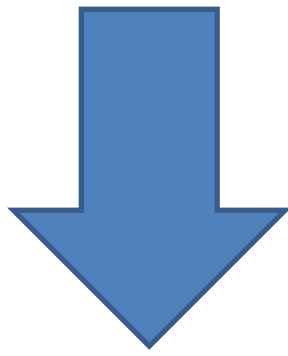
Patron is informed this does not expedite the process

Acquisitions is notified that an item On Order should be tagged with a **bib-level hold** for a selector or patron.

When item is received, **add receive date** to order. A bib level hold box will pop up, click okay.

Put **a green "bib-level hold"** slip in item

Send to Cataloging "in-process" area to catalog

11.14.11 Lynn Amber

Both types of items are treated the same from this point on.....

Cataloging processes these normally, keeping the green bib-level hold slip with the item

Once cataloged, the item is placed on the labels truck in Preservation

Books with **green bib-level hold slips** are taken from the labels truck, processed and delivered to B/B circ or courier bins

When item is received in **Access Services**, it is checked in to activate the hold and placed on the holdshelf. For **patrons without holdable privileges**, bib-hold must be manually removed and an item level hold manually added to the item record.

The above process is for On Order or Items to be Ordered that are NOT considered RUSH. The patron just wants to see the items when they are processed. If the patron requests the item be RUSHED, then the following procedures apply depending on the department ordering.....

11.14.11 Lynn Amber

ON ORDER OR NEW ORDER

RUSH

Request from Selector TO ORDER or ON ORDER

Acquisitions is notified that an order should be initiated and a **bib-level hold** is placed on the item for the selector **at the time of the order. The selector indicates it is needed RUSH; a note is placed in order record with patron/class name**

When item is received, **add receive date** to order. Double-click on the Bib Level Hold box to get the patrons name.

Put a **fuchsia "bib-level hold"** slip in item with the patron's name written on the slip

Send to **Cataloging "RUSH"** area to catalog

Request from Acc Ser for ON ORDER item

In Bib record, Access Services staff will choose Bib-level hold tab, add patron, select pick-up location and not-wanted-after date (24 months?)

Acquisitions is notified via email that an item On Order is requested **RUSH. Aqcuisitions processes using established RUSH guidelines**

When item is received, **add receive date** to order. A bib level hold box will pop up, click okay.

Put **A FUCHSIA"bib-level hold"** slip in item

Send to **Cataloging "RUSH"** area to catalog

### Requests from Reserves Staff

Reserve staff will order items needed using the online monograph order form on Acq. website

Acq staff places order and enters a note in record indicating reserve class and name

When Item is received, Acq staff will add a receive date to order record

A fuchsia RUSH slip is placed in the book (no bib hold placed) with name of class on the slip. Acc Ser(Reserves) will add bib-level holds once order records are available.

Send to **Cataloging "RUSH"** area to catalog

11.14.11 Lynn Amber
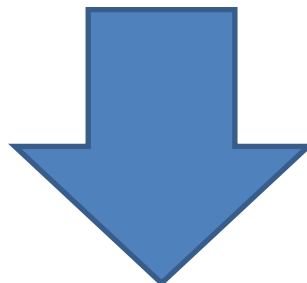
From this point on, these items are treated the same.....

> **Cataloging** processes items either full cataloging or tempcat and places on **Labels Truck in Preservation**

> **Preservation staff** pulls Fuchsia slip items off Labels Truck daily to do basic processing

> **Preservation** enters the item in **RUSH log** and hand carries the items to **B/B circ or courier bins or B/B reserves**

> **Access Services** will check-in item, place hold if necessary, and follow holdshelf procedures. Reserves will follow procedures to add to course.

> When items are returned from the patron, **tempcat items** are sent back to **Cataloging** for complete processing

Notes on TO BE ORDERED OR ON ORDER workflow:

- ➢ **Acquisitions does not use bib-level holds for Reserve orders.**
- ➢ **Patron names (or class names) are added to all RUSH slips**
- ➢ **If an order is cancelled, Acquisitions will cancel the bib-level hold which will generate a notice to the patron; the "drop hold:order" option should be selected**
- ➢ **Requests that come to Acquisitions for a patron not in the system will be sent back to the selector or Access Services for resolution.**
- ➢ **Acquisitions does not catalog or tempcat items - they always go to Catmet for processing**

11.14.11 Lynn Amber

IN-PROCESS MATERIALS

NON-RUSH

| From Acquisitions	From Selectors	From Access Services
Items arrive from Acquisitions with green bib-level hold slips and are placed in backlog are awaiting processing.	When a **selector** requests an in-process item, **cataloging** will place a bib-level hold on the item and insert a **green bib-level hold slip**	**Access Services staff** will place a **bib-level hold** on the item with a not-wanted-after date of **24 months and inform patron this does not expedite the process**
Cataloging processes items with **green bib-level hold slips** from acquisitions normally from backlog area	**Cataloging** processes these normally, keeping green bib-level hold slip with item	**Access Services** staff will email **Library.In.Process.Requests or use webform** to request a **green bib-level hold slip** be placed in the item in backlog
		Cataloging processes these normally, keeping **green bib-level hold** slip with item

11.14.11 Lynn Amber
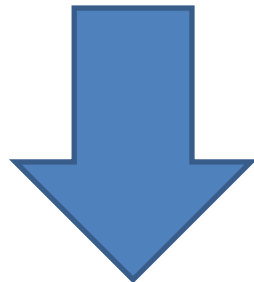
From this point on the materials are all treated the same......

Once **cataloged**, items are placed on **the Label Truck** for processing

Books with **green bib-level hold slips** are taken from the labels truck, processed and delivered to B/B circ or courier bins

When item is received in **Access Services**, it is checked in to activate the hold and placed on the holdshelf. For **patrons without holdable privileges**, bib-hold must be manually removed and an item level hold manually added to the record.

IN-PROCESS MATERIALS

RUSH

In Backlog - no bib-level hold

Acc Ser or Selector sends request to Library In Process email for **RUSH** processing

Cataloging **pulls item** and places a **fuchsia hold slip** with patrons name recorded on the slip

Cataloging **creates an item record or tempcat** with **NO bib-hold** added

In Backlog, bib-level hold

Acc Ser or Selector sends request to Library In Process email for **RUSH** processing

If patron requesting **RUSH** is same as patron with hold, **replace green hold slip with fuchsia** and process

If **RUSH request** is a different patron, add a fuchsia slip with 2nd name and process. Keep both slips with item

11.14.11 Lynn Amber
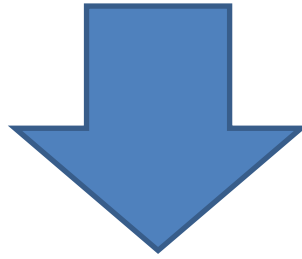
From this point on for Backlog items needed RUSH, but not immediately (overnight okay)

Preservation staff pulls Fuchsia slip items off Labels Truck daily to do basic processing

Preservation enters the item in **RUSH log** and hand carries the items to **B/B circ** or courier bins or B/B reserves

Access Services will check-in item, place hold if necessary, and follow holdshelf procedures. Reserves will follow procedures to add to course.

For items with **two holds** - one green slip and one fuchsia slip, **Access Services** will check item out to RUSH patron first (for 14 days). When item is returned, it will then be checked out to other patron. . Bib-level hold should be converted to an item level hold for second patron when placed on the holdshelf for first patron.

Notes on In-Process workflow:

- o **If the location of an item is Non-circulating, cataloging should process as normal and send the item to Access Services. Access services will follow normal procedures and place the**

item on the holdshelf, thus notifying the patron it has arrived. The Pick up By date will be adjusted at this time for 1 day on the holdshelf.

- o **When picked up, Access Services will be sure to remind patron that the item is non-circulating and cannot leave the library. Baker Reference material will remain sensitized and should be returned to the check-in window when patron is done with the item.**
- o **Stacks Maintenance will alter their workflow to include checking in all Baker Reference materials as they do with other new items, to catch any missed bib-level holds.**

- ➢ **Books that may need binding may be held up for a day, but most items leave Preservation the same day.**
- ➢ **RUSH need immediately - at times there is an immediate need for an item. Although this is rare, and not encouraged, the workflow is as follows: Cataloging is notified and will tempcat the item and place a fuchsia slip in the item with the patron name on it and time needed; then they will mark the item manually, take it to preservation and enter it in the RUSH log. Cataloging will hand carry the item to the proper circulation desk or courier bin.**

GENERAL GUIDELINES FOR ALL STAFF WHEN PLACING BIB-LEVEL HOLDS

1. Make sure there is NO item record
2. Click on the "Bib level Hold" tab
3. Click on ADD PATRON
4. select either Patron name or Patron barcode
5. put in the name or barcode
6. put in a PICKUP LOCATION (use the selector's location as the pickup location, i.e. if a selector from Dana requests a book use Dana as the pickup location regardless of where it classes. If the request is not from a selector use the location in the order record.)

7. put in a NOT WANTED AFTER DATE (24 months from "today") for green bib-level holds WHAT IS USED FOR RUSH HOLDS??

REPLACEMENTS WITH BIB LEVEL HOLDS

If you have a replacement that has a Bib Level hold on it and it is a TO REPLACE, do nothing and process as normal.

If you have a replacement that has a Bib Level hold on it and it is a straight replace:

1) remove the Bib Level hold
2) add a green slip to the item with the patrons name on it
3) process replacement as normal