

# Ordered—Received Requests in Aleph: Implications for Division Staff of HCL Technical Services

Revised: 25 October 2006

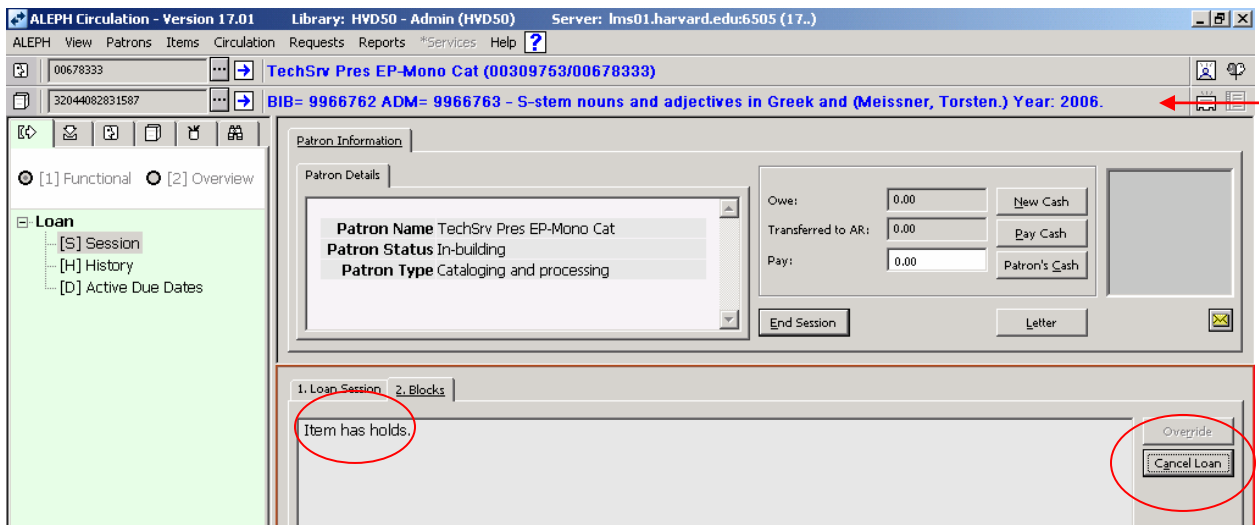
HOLLIS Catalog request functionality was implemented in June 2006 for uncataloged materials with Aleph item records coded as Ordered-Received (Item Process Status of RE). A "request" link now appears on the Availability screen of the HOLLIS Catalog record. When library patrons use this link to request materials, the system places the patron into a Hold queue that is pending in the Aleph Circulation module. This document describes how technical services staff may identify unfulfilled patron requests pending in Aleph.

Whenever staff members update an item record or attempt to charge/discharge an item in the course of their work, there is the possibility of encountering a pending Hold request. **All materials with Holds should be flagged and placed on your Division's Patron Request/Notify shelf** to be picked up and processed by Materials Management\*. ([Hold alert flags](#) will be available in the Divisions and in the Bib Review Room.)

*Staff must be alert to the messages from Aleph, and they are described in detail below.*

## Holds identified in Aleph when charging materials

Aleph will not allow you to charge materials with active Holds, therefore staff should not be concerned that they are not able to charge materials to the usual pseudopatrons. The following screen shot from the Circulation module "Loan" tab displays the message that staff would encounter if a Hold is pending on an item that they are attempting to charge (such as to a pseudopatron for End Processing, etc.):

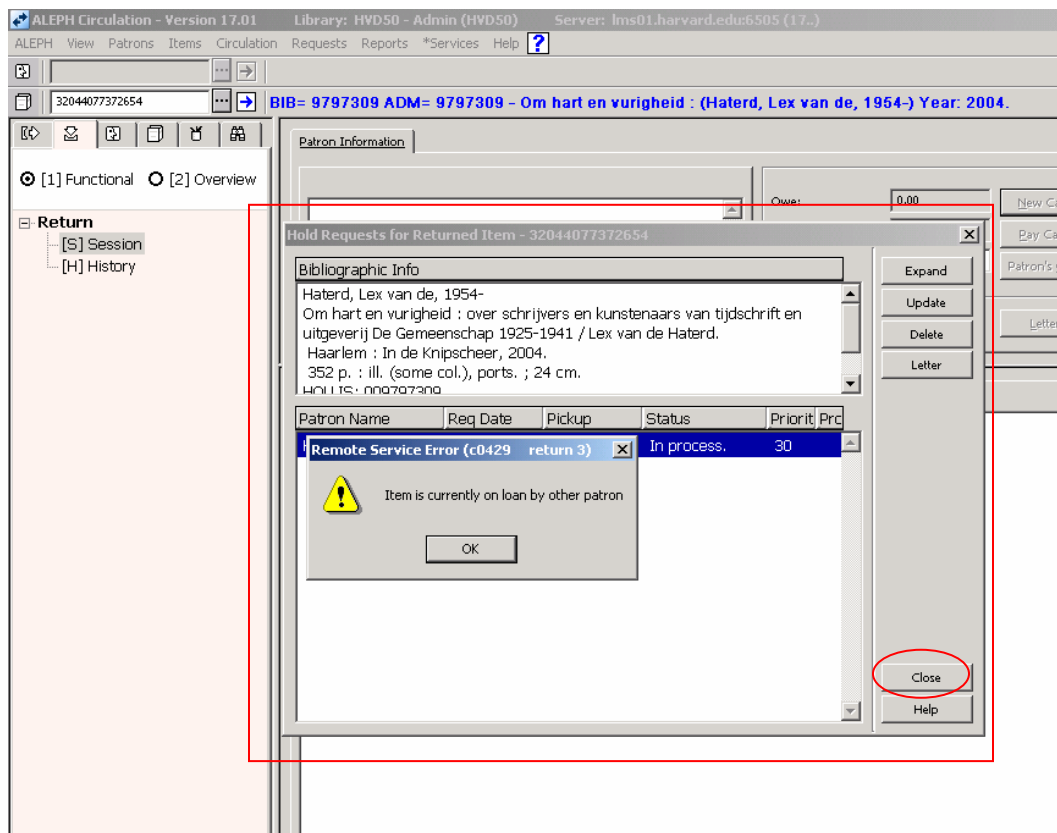


Please note the "Cancel Loan" button at the right. The system forces the operator to acknowledge that they have seen the message by requiring the Cancel Loan button to be clicked before allowing other books to be charged. If staff are attempting to charge a batch of books in quick succession, it will be very important to pay attention to the

display in the lower pane to see either that the title of the book in hand has been successfully charged, or to notice this Hold message. If you need to verify to which book the Hold message pertains, the title of the book is visible in blue across from the barcode entry field (as the red arrow indicates above).

### Holds identified in Aleph when discharging materials

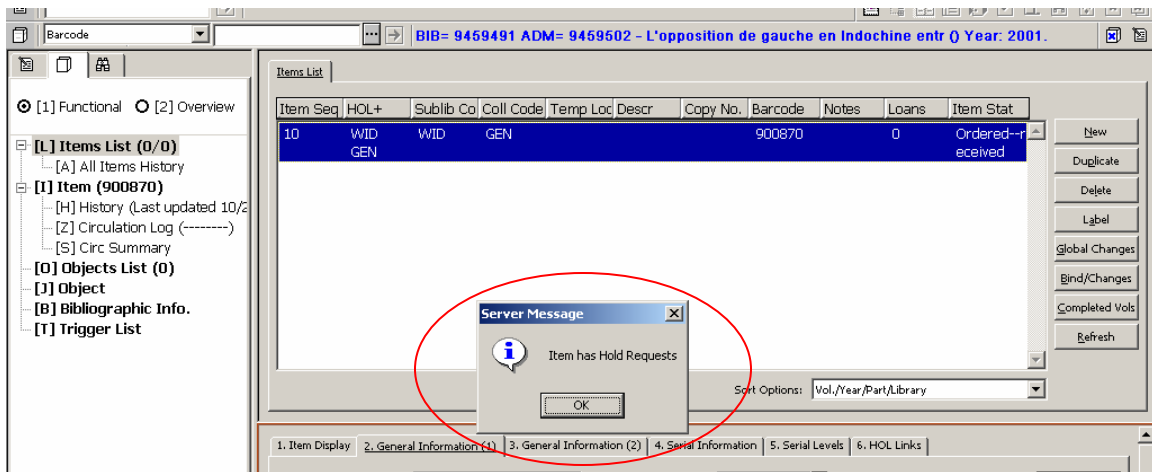
When discharging a book on the Circulation module “Return” tab (such as to place a newly cataloged HD item into the [In-Transit status](#)), the system displays a pop-up message alerting staff to pending Hold requests. Because staff will be expecting a pop-up message that says the item must be returned to the Harvard Depository, they need to be especially aware of the text of the message before clicking through it. In this case, the Hold Requests dialog box may be initially covered with an Error Message, as below:



Staff members may click OK on the Error message that partially covers the Hold Requests dialog box, and then click Close on the Hold Requests dialog box.

### Holds identified in Aleph when updating an item record

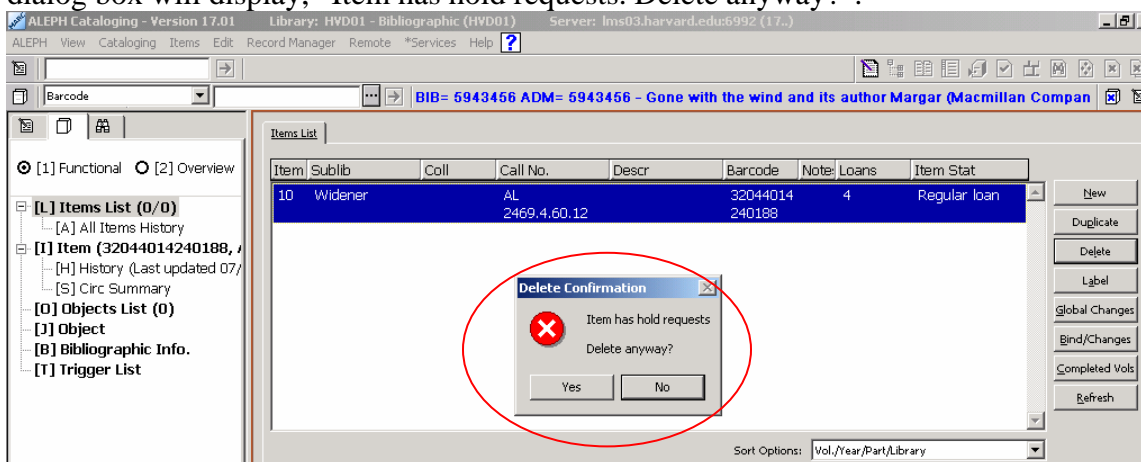
A new pop-up message was incorporated into Aleph v. 18 to alert staff members of pending holds whenever any change is made to an item record.



After acknowledging the pop-up by Clicking OK, you may complete the cataloging if further updates are needed to the record, but it is not necessary. If any delay in availability would arise from completing the cataloging, staff should chose to defer the final processing until the patron has finished with the material.

### Holds identified in Aleph when deleting an item record

If staff members attempt to delete an item record with an active Hold, the following dialog box will display, “Item has hold requests. Delete anyway?”:



Item records with active holds should never be deleted. Click No to exit the dialog box.

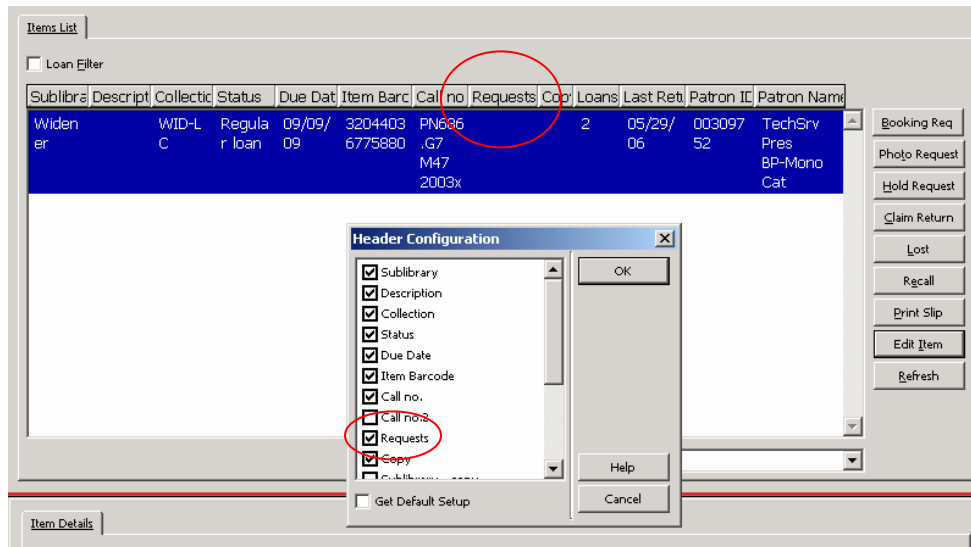
Encountering any of the above scenarios should prompt staff members to flag the material as having a Hold and placing it on their division’s Patron Request/Notify shelf.

### Configuring Aleph to See Pending Holds in the Circ Item List

If staff members need to verify that a Hold is active on a book, they should scan the barcode on the Item tab of the Circulation module. In order to view pending requests, staff should turn on the option to view the “Requests” column as part of the Circulation

Item List. It will simply show the number of requests that are pending for a given item. The column display is blank if there are no requests pending in the system.

To add this column to the Item List, right click on the gray heading bar of the Item List. It will open a form with Check Box options to add or remove fields to the display. Check on the Requests option to add it to the columns of displayed fields.



### Changes to Local Practice for Items marked Catalog Review

Because most requested materials are provided to patrons before cataloging, the item records of these materials are annotated with Catalog Review notes to alert Circulation staff to return the item to us for cataloging. HCL Technical Services has decided to charge to a pseudopatron all Catalog Review materials that have been returned from a patron request. Because all actively charged materials are eligible for requesting via the HOLLIS Catalog (as a recall request), this practice is intended to minimize any time period when materials are not requestable from HOLLIS while they are awaiting full cataloging.

*Background:* Because the Ordered—Received request functionality in HOLLIS is driven by the value of RE in the Item Process Status of the item record, the request link would no longer be displayed for subsequent patrons after we have edited the item record to fulfill an initial patron request (the IPS is changed to Blank to allow the patron to loan the item).

By charging this uncataloged material to a pseudopatron, the HOLLIS Catalog provides a request link by virtue of the active charge, and thereby provides a relatively consistent display for patrons who will be used to seeing the request link for uncataloged materials. When cataloging is completed, the cataloger should charge the item to the same End Processing or Bindery pseudopatron that they currently use. This provides request functionality at all steps of processing, and ensures accurate tracking for staff who need to locate this material.

## Questions regarding Pending Holds

Staff in HCL Technical Services may contact their supervisor or Materials Management staff if they have any questions about patron requests or holds pending in Aleph.

For more background information about the Ordered-Received request process, consult the OIS document: [http://hul.harvard.edu/ois/systems/aleph/docs/rec\\_ord\\_rec.pdf](http://hul.harvard.edu/ois/systems/aleph/docs/rec_ord_rec.pdf)

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\* Cataloging units within Widener Library are advised to develop local procedures to ensure that staff in their units are aware of these changes and know how to expedite materials to Circulation for patron requests.