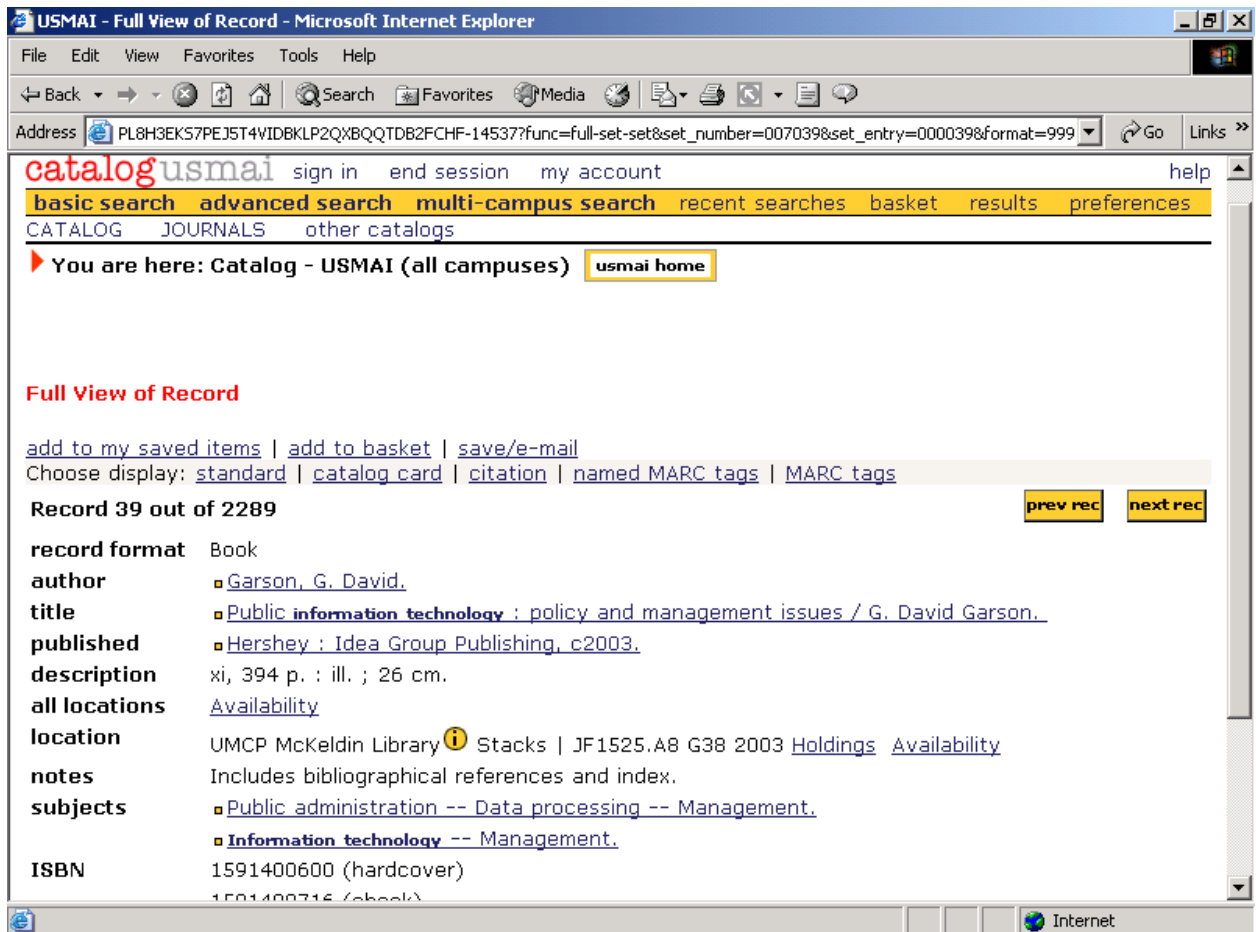


TITLE LEVEL PATRON PLACED HOLDS AND AUTOMATIC RECALL PROCESS IN ALEPH 500 15.2 FOR THE USMAI

The following is an outline of the resource sharing process that Aleph 500 15.2 provides to USMAI users. The outline follows the process from both the perspective of the public user and circulation staff.

General Web PAC Functionality:

- Patrons can choose to search either individual virtual campus catalogs or the USMAI catalog which is the global bibliographic catalog.
- The Results List from a search will show the sub-libraries that own at least one copy of the title (unless there are too many to fit on the screen and users will be prompted to retrieve more.)
- The Full View of Record screen shows the institutions that have at least one copy in their holdings
- Once an individual record is selected the bibliographic information is shown. To retrieve the holdings, click on the Holdings or Availability link next to a particular institution or, to see the status of each item in the USMAI, click on the Availability button above the sub-library list on the same screen.



USMAI - Full View of Record - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print Copy Paste

Address PL8H3EKS7PEJ5T4VIDBKLP2QXBQQTDB2FCHF-145377func=full-set-set&set_number=0070398&set_entry=0000398&format=999 Go Links >>

catalogusmai sign in end session my account help

basic search advanced search multi-campus search recent searches basket results preferences

CATALOG JOURNALS other catalogs

▶ You are here: Catalog - USMAI (all campuses) usmai home

Full View of Record

[add to my saved items](#) | [add to basket](#) | [save/e-mail](#)

Choose display: [standard](#) | [catalog card](#) | [citation](#) | [named MARC tags](#) | [MARC tags](#)

Record 39 out of 2289 [prev rec](#) [next rec](#)

record format Book


author [Garson, G. David.](#)

title [Public information technology : policy and management issues / G. David Garson.](#)

published [Hershey : Idea Group Publishing, c2003.](#)

description xi, 394 p. : ill. ; 26 cm.

all locations [Availability](#)

location UMCP McKeldin Library  Stacks | JF1525.A8 G38 2003 [Holdings](#) [Availability](#)

notes Includes bibliographical references and index.

subjects [Public administration -- Data processing -- Management.](#)
[Information technology -- Management.](#)

ISBN 1591400600 (hardcover)
1591400716 (ebook)

Internet

- For serial records, the user can retrieve just the holdings and items of a particular campus or, if the user clicks on the Availability link next to the **all locations** label on the Full View of Record, a list of summary holdings for each campus appears followed by a list of each volume/part and or year on the Holdings screen.

Holdings and availability for all libraries back

Advances in applied developmental psychology (1993)
Advances in applied developmental psychology. ... c1993-

Location St. Mary's College of Maryland Stacks BF 712 .A37 YHDVSO Continues: Annual **advances** in applied developmental psychology

Summary Holdings Holdings: v.7-

Location UMCP McKeldin Library Stacks BF712 .A361

Summary Holdings Holdings: v.7- (1993-)
For holdings search under call number and/or authors and titles of individual volumes. Analyzed.

request (request an item for pickup)

Modify results by: vol/issue library send

library	collection	call no.	vol/issue	item status	due date	note
St. Mary's College of Maryland	Stacks	BF712.A37		in process	On shelf	
St. Mary's College of Maryland	Stacks	BF712.A37		in process	On shelf	
St. Mary's College of Maryland	Stacks	BF712.A37	v. 21	General coll.	On shelf	
St. Mary's College of Maryland	Stacks	BF712.A37	v. 20	General coll.	On shelf	
St. Mary's College of Maryland	Stacks	BF712.A37	v. 19	General coll.	On shelf	

- All item holdings have current circulation/acquisition or cataloging status, including non-circulating information and due date if charged out.

Patron Placed Holds Functionality in the Web OPAC:

- Patrons can place a title-level request on any title in any catalog, USMAI catalog included, where there is at least one eligible copy.
- The user begins the process by clicking on the Availability link on the Full View of Record screen (see record on Page 1)
- The **Holdings and availability** screen appears, listing all holdings and items in the USMAI. In order to place a title level request, the clicks on the yellow **Request** button (see record above)
- In Aleph, and new to the CARL sites, users can place a hold on a specific part or volume of a multi-volume set (see section on Placing a Hold on a Volume in a Multi-volume Set.)
- Patrons are validated against the USMAI patron file when they log onto the Web OPAC or, if they didn't sign in initially, they are asked to enter an ID or barcode and their last name at the time of placing the hold.

- Regardless of catalog searched, or title chosen by the patron, all USMAI holdings are reviewed for eligibility in terms of filling the request for that patron.
- Items attached to that title are checked across the USMAI for:
 - o Item eligibility for loans (e.g. non-circulating item status, etc.)
 - o Availability (e.g. charged, billed as Lost, IPS of Lost, etc.)
 - o Chargeability to that patron (e.g. restricted to "local" borrowers only, etc.)
- The patron can specify any USMAI site as the pick-up site for each request unless there is a copy of the title sitting on the shelf at the pick-up site and the pick-up site does not page. Only UB, UMLL, UBLL, and CEES allow holds placed on items that are on the shelf.

The screenshot shows the 'catalogusmai' interface. At the top, there are navigation links: 'end session', 'my account', 'saved searches', 'saved items', and 'help'. Below this is a menu with 'basic search', 'advanced search', 'multi-campus search', 'recent searches', 'basket', 'results', and 'preferences'. A breadcrumb trail reads 'You are here: Catalog - USMAI (all campuses)' with a 'usmai home' button. The main content area displays 'Request - MESSMAN, LEA M.' and a 'Select a pickup location' dropdown menu. The dropdown is open, showing a list of libraries including Frostburg State University, UMBC Library, UB Law Library, CES, Chesapeake, CES, Horn Point, CES, Appalachian Lab, UMCP Shady Grove, Coppin State College, UM Eastern Shore, UMLL, and Morgan State University. To the right of the dropdown, a message states: 'You may not be able to select a particular library for your pickup location if the item is on the shelf at that library.' Below the dropdown is a text input field for 'Not needed after' with the value '200307'. There are 'send' and 'cancel' buttons. At the bottom left, it says '© 2002 University System of M' and at the bottom right, 'send us your comments.'

- If the user is successful in placing the hold, a confirmation message will appear on the Web OPAC screen.

Placing a Hold on a Volume in a Multi-volume Set

The screenshot shows the 'catalogusmai' interface. At the top, there are navigation links: 'end session', 'my account', 'saved searches', 'saved items', and 'help'. Below this is a menu with 'basic search', 'advanced search', 'multi-campus search', 'recent searches', 'basket', 'results', and 'preferences'. A breadcrumb trail reads 'You are here: Catalog - USMAI (all campuses)' with a 'usmai home' button. The main content area displays a confirmation message: '* Item requested for pickup at Frostburg State University. You will be notified when item is available.' Below this is the 'Full View of Record' section. It includes links for 'add to my saved items', 'add to basket', and 'save/e-mail'. A 'Choose display:' section offers options: 'standard', 'catalog card', 'citation', 'named MARC tags', and 'MARC tags'. The record is identified as 'Record 2 out of 39' with 'prev rec' and 'next rec' buttons. The record details are as follows:

- record format**: Book
- title**: Books, bytes, and bridges : libraries and computer centers in academic institutions / edited by Larry Hardesty.
- published**: Chicago : American Library Association, 2000.
- description**: xiii, 220 p. : ill. ; 26 cm.
- all locations**: [Availability](#)
- location**: Bowie State University ⓘ General Stacks | Z675.U5 B66 2000 [Holdings](#) [Availability](#)
- location**: SU Blackwell Library ⓘ Stacks | Z675.U5 B66 2000 [Holdings](#) [Availability](#)
- location**: St. Mary's College of Maryland ⓘ Stacks | Z675.U5 B66 2000 [Holdings](#) [Availability](#)

- The Full View of Record screen for a serial or multi-volume set looks the same as any other Full View screen described in the General Web PAC Functionality section.

The screenshot displays the 'Full View of Record' page. At the top, there is a navigation bar with links for 'end session', 'my account', 'saved searches', 'saved items', and 'help'. Below this is a search bar with options: 'basic search', 'advanced search', 'multi-campus search', 'recent searches', 'basket', 'results', and 'preferences'. A breadcrumb trail indicates 'You are here: Catalog - USMAI (all campuses)' with a 'usmai home' button. The main content area is titled 'Full View of Record' and includes links for 'add to my saved items', 'add to basket', and 'save/e-mail'. It also shows 'Choose display: standard | catalog card | citation | named MARC tags | MARC tags'. The record is identified as 'Record 4 out of 4'. The title is 'Advances in archaeological method and theory', published in 'New York : Academic Press, 1978-'. The source for address is 'Academic Press, Inc., 111 Fifth Avenue, New York, 10003'. The description is 'v. : ill. ; 24 cm.' and the publication history is 'v. 1-'. There are four location entries: Morgan State University, St. Mary's College of Maryland, Towson University, and UMBC Libraries, each with links for 'Stacks', 'Holdings', and 'Availability'.

- However, after the user retrieves the **Holdings and availability** screen (see record on page 2) and clicks on the **Request** button to begin the hold process, another level of information or screen is retrieved – also called a “request” screen. At this point, all eligible items have been sorted into “Hold Groups” by volume number and/or year. Up to 20 Hold Groups will display on this screen.

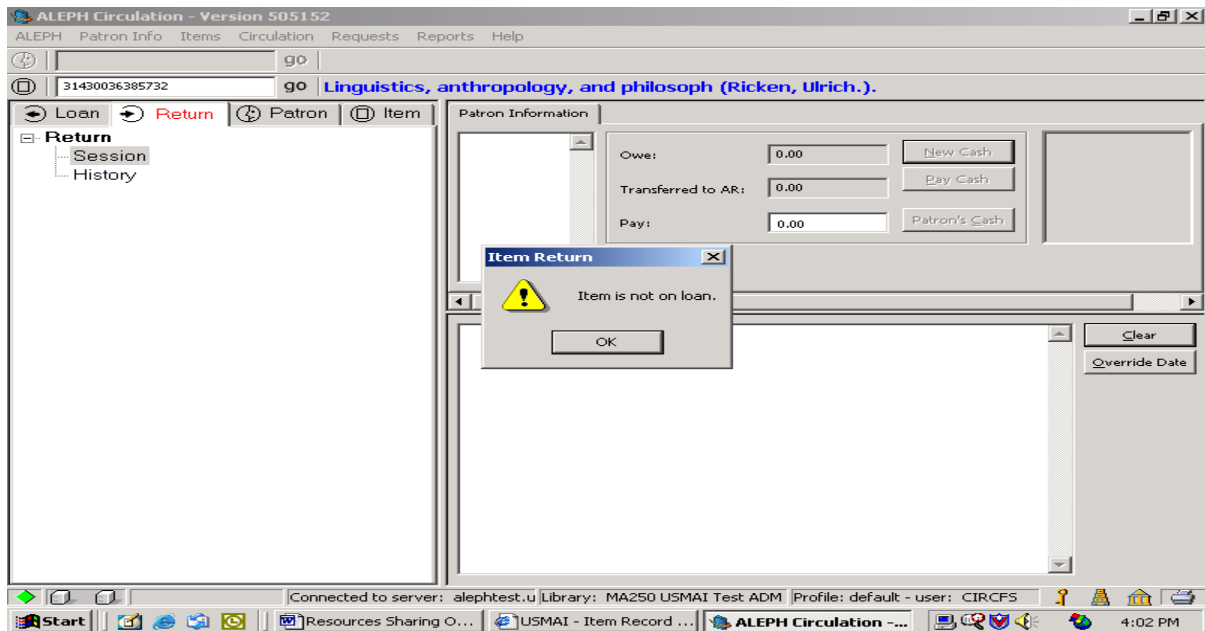
The screenshot displays the 'Request' page. It features a 'Display vol/year' pull-down menu currently set to 'All' and a 'send' button. Below this, there is a list of request links for various volumes: 'request v.3', 'request v.2', 'request v.1', 'request v.11', 'request v.9', 'request v.8', and 'request v.7'. At the bottom of the page, there is a copyright notice: '© 2002 University System of Maryland and Affiliated Institutions. Send us your comments.'

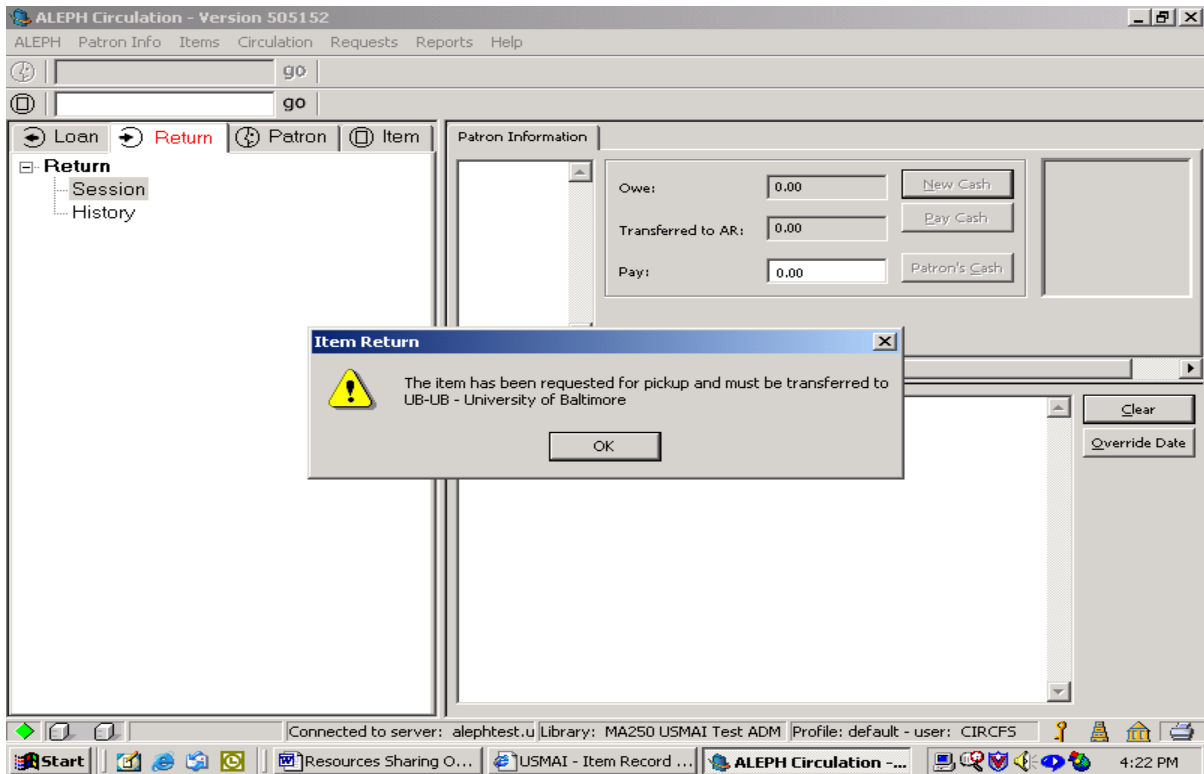
- If a Bib record has more than twenty eligible hold groups attached to it, then the user clicks on the Display vol/year pull-down menu, highlights the correct volume/year and clicks on send.

- To place a hold request, the user must click on the [request](#) button to the left of the desired volume/year. The rest of the Hold process remains the same.
- Ineligible items (e.g., non-circulating, lost, etc.) have been filtered from this screen. To see all of the available holdings in the USMAI or a particular sub-library, then the user should select All Items on the Full View of Record or next to the sub-library.

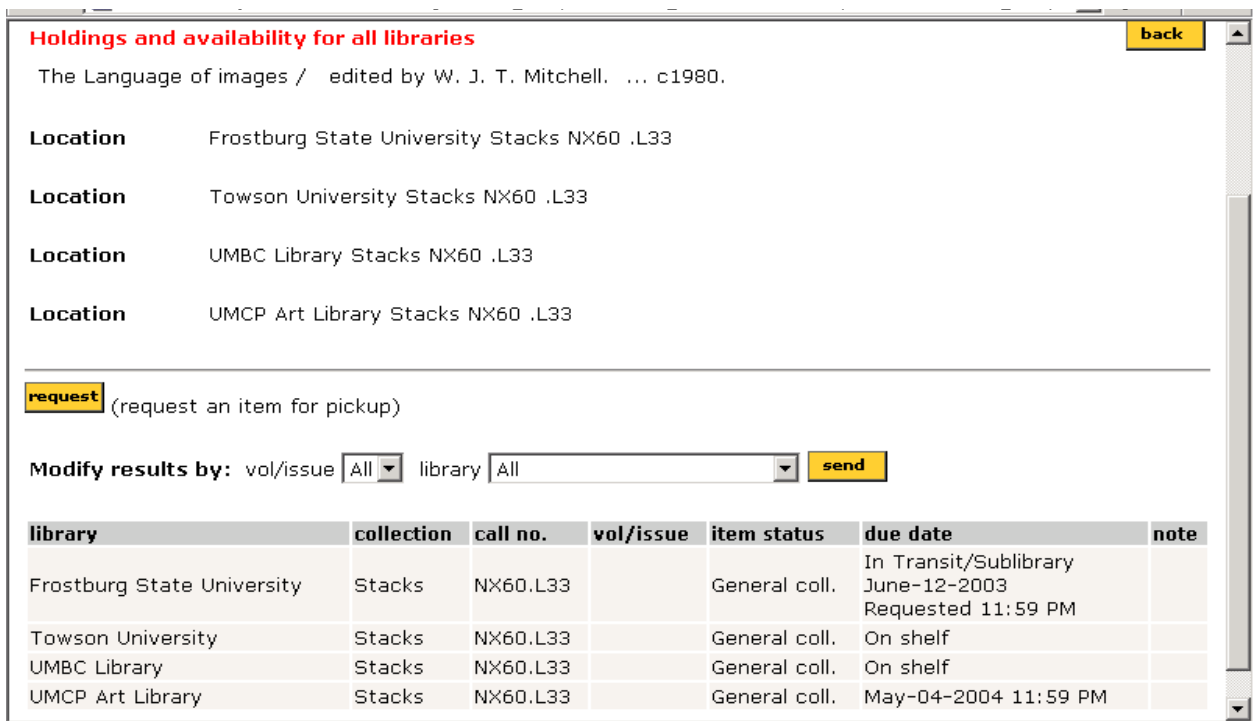
Patron Placed Holds Processing at the Circulation Desk:

- Following placement of a hold request, any copy that is eligible to fill the request that becomes available (i.e. returned) anywhere in the USMAI will be shipped in-transit to the pick-up site.
- A batch program (Balance) is run several times a day to evaluate each new request and move unsatisfied requests along. It reviews all eligible holdings and consults a "preferred order" list of suppliers (smallest sub-library to largest) for holds to be routed to the individual sub-library that meets the request criteria.
- The Outstanding Hold Requests Report, showing holds waiting at the sub-library, is printed from the sub-library's Task Manager and identifies items to be pulled from the shelves of that sub-library to satisfy the requests. (See Appendix for copy of report.)
- If staff cannot find an item, they change the Item Processing Status of the item to MI for "Missing" or RM for "Missing, Searched" and the next time the batch is run the hold request will move to the next eligible institution's Outstanding Hold Requests Report.
- When a requested item is retrieved from the shelf, it is discharged in circulation. It will say that it is not on loan and when you click on OK it will indicate that the item has been requested and must be sent in-transit to the pick-up site.

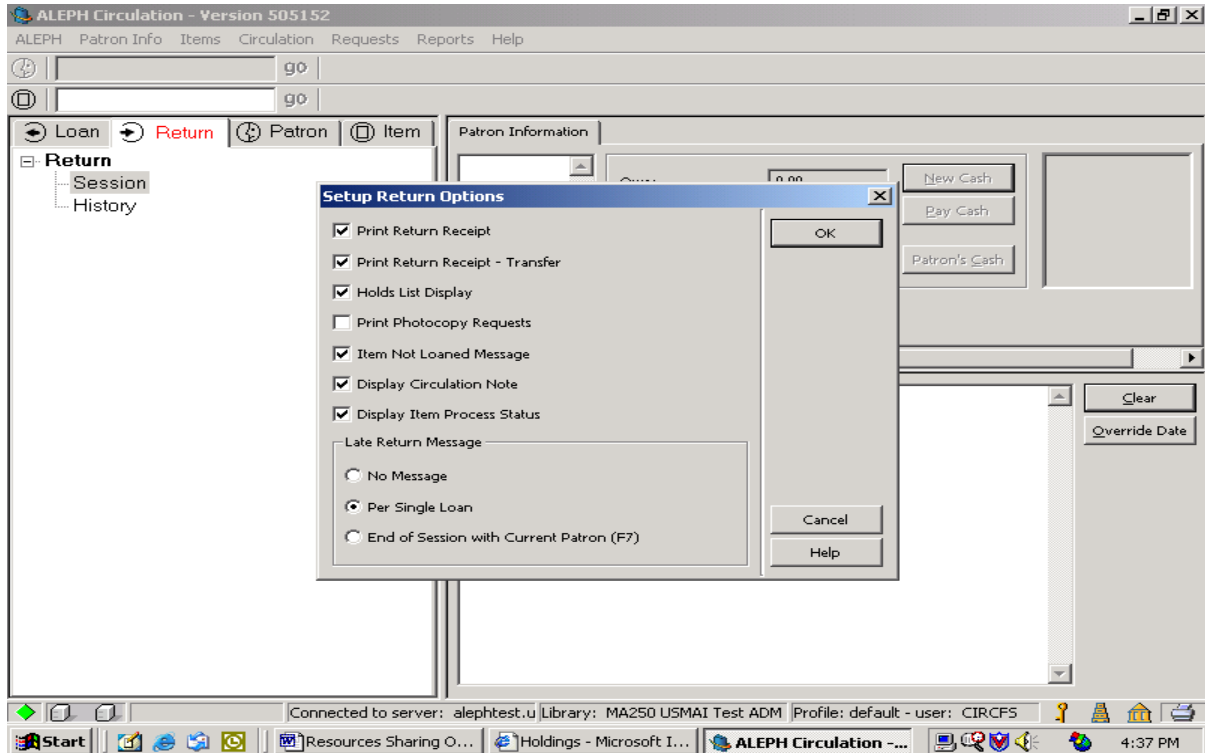




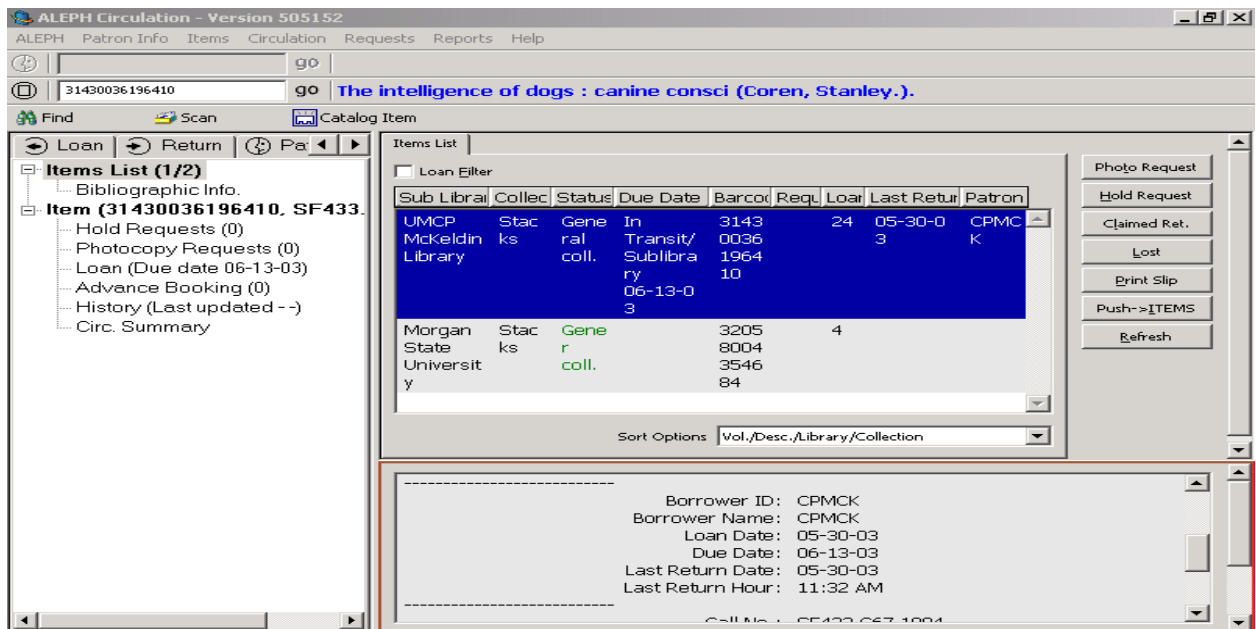
- Also, if an eligible copy is returned to the Circulation Desk during the process, when it is discharged in circulation it will be sent in-transit to the pick-up site if the hold has not already been satisfied by another copy.
- The screen indicates that the item must be placed in transit.
- The circulation status will reflect this.



- A Transfer Slip will print automatically (must set workstation to do this under ALEPH - Options – Setup Return Options – Print Return Receipt - Transfer) to be placed in the item. (See Appendix for a copy of notice.)



- During the period that the item is intransit, it is actually charged to the intransit borrower of the sublibrary where the item is being sent.



Automatic Recalls

- If no eligible items are available on the shelf, a charged out item will be recalled automatically (i.e. requiring no staff-intervention). The loan period may be changed (based on each owning institution's parameters to ensure that the original borrower is treated fairly and has use of the item for a minimum loan period).
- A Loan Recall notice will be generated in the item owning sub-library's Task Manager for printing and mailing to the current user of the item.

Hold Shelf Processing

- When an eligible copy is finally received or returned to the pick-up site, it is returned in circulation and a Hold Request slip is printed to go in the copy and the item is placed on the pick-up site's Hold Shelf. The item will indicate that it is on hold in the Web OPAC.

The screenshot shows the USMAI catalog interface. At the top, there are navigation links: 'catalogusmai', 'sign in', 'end session', 'my account', and 'help'. Below these are search options: 'basic search', 'advanced search', 'multi-campus search', 'recent searches', 'basket', 'results', and 'preferences'. There are also links for 'CATALOG', 'JOURNALS', and 'other catalogs'. A breadcrumb trail indicates the user is in 'Catalog - USMAI (all campuses)' with a 'usmai home' button.

The main content area displays 'Holdings and availability for all libraries' with a 'back' button. The title is 'Bernhardsen, Tor. Geographic information systems : an introduction / Tor Bernhardsen. 3rd ed. ... c2002.' The location is 'UMCP McKeldin Library Stacks G70.212 .B473 2002'.

Below the title, there is a 'request' button and the text '(request an item for pickup)'. There are also dropdown menus for 'vol/issue' (set to 'All') and 'library' (set to 'All'), with a 'send' button.

library	collection	call no.	vol/issue	item status	due date	note
UMCP McKeldin Library	Stacks	G70.212.B473 2002		General coll.	On Hold	

At the bottom, there is a copyright notice: '© 2002 University System of Maryland and Affiliated Institutions. Send us your [comments](#).'

- A Hold Request Available notice is sent from the request pick-up site to the user.
- If a hold can not be satisfied, a Hold Waiting notice can be printed.
- If the "not needed after date" has expired, the "dead" hold disappears from the Outstanding Hold Requests Report.

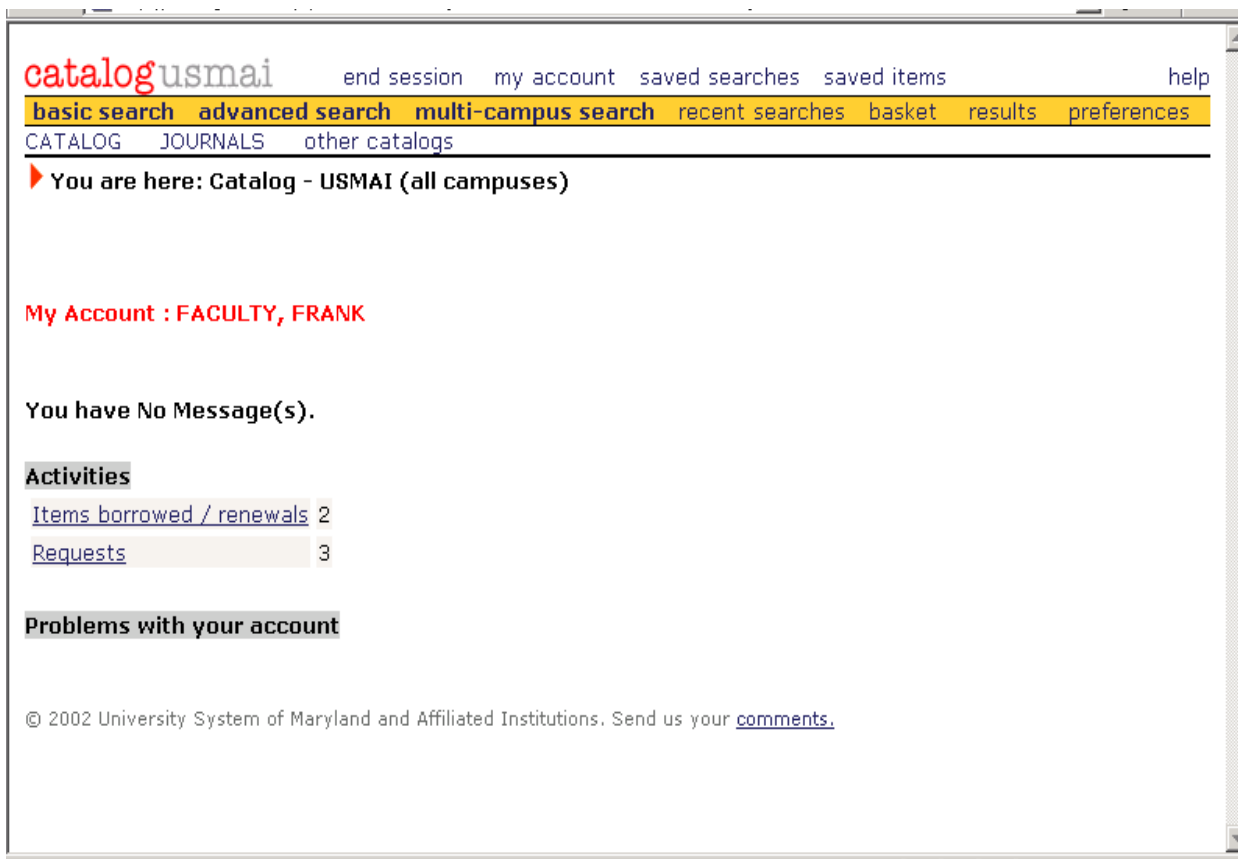
General Inter-institutional Circulation Functionality:

- Any eligible patron can charge/renew/discharge any book at any USMAI circulation desk. There are no extra steps during the discharge of books except for the printing of an in-transit slip if the item is owned by another site within that institution or another institution.
- The circulation rules for the institution that owns the book will always be applied no matter where the charge/renew/discharge takes place.
- All patron records can be reviewed at any Circulation site in an integrated list.

- All circulation activity for all patrons can be reviewed at any Circulation site, except financial transactions incurred on other USMAI items.
- Financial transactions can only be seen and negotiated (i.e. paid, waived, partially paid) at the item owning institution.
- Staff can place hold requests on materials in the GUI PAC that respond similarly to the patron-placed requests. However, staff may be able to place holds on items that are restricted from patron placed holds (e.g. items needed for Reserves, media, etc.)
- Although staff can place item requests or change the IPS status on any institution's materials to missing, it is not encouraged to do so.
- Staff at any Circulation site can add or change a patron record even if they belong to another institution.
- Any blocks/holds/notes are available to all circulation sites.
- Blocks based on cumulative overdue recalls and financial activity from all institutions are generated automatically.

My Account in the Web OPAC:

- Patrons can review their own circulation record after validation. This information includes some notes, items charged, and hold requests for activity at all USMAI sites in one list.



The screenshot shows the 'My Account' page in the USMAI Web OPAC. The page header includes the 'catalogusmai' logo and navigation links: 'end session', 'my account', 'saved searches', 'saved items', and 'help'. A yellow navigation bar contains links for 'basic search', 'advanced search', 'multi-campus search', 'recent searches', 'basket', 'results', and 'preferences'. Below this, there are links for 'CATALOG', 'JOURNALS', and 'other catalogs'. The main content area shows 'You are here: Catalog - USMAI (all campuses)'. Under the heading 'My Account : FACULTY, FRANK', it states 'You have No Message(s)'. There are two sections: 'Activities' with links for 'Items borrowed / renewals' (2) and 'Requests' (3); and 'Problems with your account'. The footer contains the copyright notice: '© 2002 University System of Maryland and Affiliated Institutions. Send us your [comments](#).'

- Patrons can review the details of their hold requests.

catalog.usmai end session my account saved searches saved items help

basic search advanced search multi-campus search recent searches basket results preferences

CATALOG JOURNALS other catalogs

► You are here: Catalog - USMAI (all campuses)

Requests for: FACULTY, FRANK

For details about a request, select the item number.

no.	description	request date	status	vol/issue	pickup location
1	Books, bytes, and bridges : libraries and computer centers in academic institutions / edited by Larr	May-30-2003	In process		Frostburg State University
2	The enduring library : technology, tradition, and the quest for balance / Michael Gorman.	May-30-2003	In process		Frostburg State University
3	Digital libraries : philosophies, technical design considerations, and example scenarios : pre-publi	May-30-2003	In process		Frostburg State University

Internet

- Patrons can delete their own holds if the request has not been processed.

catalog.usmai end session my account saved searches saved items help

basic search advanced search multi-campus search recent searches basket results preferences

CATALOG JOURNALS other catalogs

► You are here: Catalog - USMAI (all campuses)

Information for request no. 1

pickup location: Frostburg State University

vol/issue:

delete

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