General Overview of processes

+ = recommended

*CSDirect – Holds Management Overview - csdirect.iii.com/documentation/holdsmanagement.shtml
   *Note – Has sample workflow and best practices

About the Rules Files (page #105820)
*CSDirect – Holds Features - csdirect.iii.com/documentation/holdsdesignb.shtml
*CSDirect – Locations Served FAQ - csdirect.iii.com/documentation/locserv.shtml

Patron Placing Requests/Holds

*Request Worksheet (page #101220)
   *Note – method to submit changes regarding request processing

Patron Request Parameters (page #101209)
   Specify Pickup Location for Request (page #101214)
   *Note – allows the “ask” function for patron determined location – defined through Hold Pickup Locations function
   Requests: Pickup Location (page #101897)

Rules for Requesting (page #105816)
   The request rule File (page #101221)
   Requests: Patron eligibility determined by (page #101898)

Allow Patrons or System to Choose Item for Request (page #101212)
   Allow Requests for Journal Articles (page #105005)
   *Note – this is not an ArticleFirst article – however, may not be applicable

Hold Pickup Locations Table (page #106041)
Holds Thresholds Table (page #107529)
*CSDirect – Set up Holds -- csdirect.iii.com/documentation/holdsdesign.shtml
   *Note – has step by step info on setting up Holds and processes that will need rethinking

Optional Holds Functionality (page #105103)
*CSDirect – Holds Troubleshooting Guide - csdirect.iii.com/documentation/trouble_holds.shtml

Request/Holds Processing

Read Patron Requests (page #101594)
Setting up Automatic Patron Request Processing (page #101219)
Special Actions Taken During Automatic Patron Request Processing (page #105007)

Paging

*CSDirect – Start Using Title Priority Paging – csdirect.iii.com/documentation/tppstart.shtml
   *Note -- information on Location Served Entries
   *Note – questions that must be answered for set-up of Title Priority Paging

CSDirect – Use Staff Paging in Special Situations
   *Note – used in lieu of patron initiated for items not in Location Served Table

Printing paging Slips for Items with Specific Statuses (page #107634)
Item Paging Slip Data Library (page #107891)
Creating Customized Print Templates (page #107687)
Item Paging Slips (page #107864)
CSDirect – Notices Troubleshooting Guide - csdirect.iii.com/documentation/trouble_notices.shtml
Paging Slips (page #102515)