Illinois Heartland Library System

SHARE

Sharing Heartland's Available Resources Equally

POLARIS

LIBRARY SYSTEMS

HOLDS

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Hold Requests

When a patron wants a title that is not available at your library, but is owned by another library in SHARE, you or the patron can place a request for the title (title-level hold) or a specific copy of the title (item-level hold). Your library may also allow first available copy requests on a specific issue of a serial or a specific part of a multi-part set.

The request is then sent to the designated libraries in a specified order through Requests-to-Fill (RTF) processing. A library can choose to fill or deny a request. To fill a request, the library checks in the item and sends it to the pickup library. Then, the item is checked in at the pickup library and held for the patron.

The RTF process is one way that hold requests are filled. In addition, whenever an item that fills a hold request is scanned at circulation, you see an alert message with appropriate instructions. If an item is scanned at the request's pickup library, you typically hold the item. If an item is scanned at any other library, you typically ship the item to the pickup library.

Terms

First Available Copy Requests	Hold requests for specific issues of a serial title or specific parts of a multi-part title.
Group (holds)	Two or more related hold requests for the same patron, with a status of active, inactive, or pending, can be grouped when a patron wants any one of several requested titles. When one request is filled, the others are deleted. The group is assigned a letter.
Hold Request	A patron or staff member may place a request to set aside an item for the patron to pick up later, usually because the item is currently unavailable.
Hold Slip	A paper record printed when an item is trapped (held) at check in or renewal for a patron and placed with the held material for identification.
Holds Queue	A list of requests with pending or active status for a title or item. Requests are typically filled in the order they appear in the queue.
Item Holdability	Holdability is an item's eligibility to be trapped for a hold request. A specific item may be holdable without restrictions, with specified restrictions, or not holdable under any conditions.

| Item-Level Hold | A request for a specific item when only that item satisfies the request. Example: A specific issue of a magazine. |

| Requests-to-Fill (RTF) Processing | Polaris sends hold requests to designated libraries in a specified order. A library chooses to fill or deny the request. The request is routed until it is filled, it expires, or every library denies it. |

| Title-Level Hold | A request for a title when any item attached to the bibliographic record satisfies the request. |
| Trapping | An item is trapped for a hold when an item that fills a request is scanned at circulation and the system links the item to a specific request, either automatically or by displaying a message that prompts you for a decision. |

PLACING HOLD REQUESTS

You can request one or multiple titles for a patron, or the same title for multiple patrons. You can also request specific items, and your library may also allow first available copy requests on a specific issue of a serial or a specific part of a multi-part set. A hold request can be placed on any bibliographic or item record, unless the record is provisional (incomplete) or an item is restricted from holds in some way.

Hold Request Messages and Blocks

Messages and blocks may appear as you create hold requests:

- **All items attached to this title are restricted from filling requests** – If you click **[Yes]** to place the request, the request is saved as Active, which means the system will keep looking for items to fill the request. You can cancel an active request. Click **[No]** to stop saving the request.
- **Title: Title Name This item is restricted from filling requests** – Click **[Yes]** to place the request with a Not Supplied status. Click **[No]** to stop saving the request.
- **Patron has exceeded request limit for *Title Name*** – Click **[Yes]** to place the request with an Active status. Click **[No]** to stop saving the request.
- **Item Blocks dialog box** – Click **[Yes]** to override the block and create the item request. Click **[No]** to stop creating the request.
- **Items are not available to fill the request for the following reasons** – Click **[Yes]** to place the request with an Active status. Click **[No]** to stop saving the request.

- **No items are attached to the bibliographic record** – Click **[Yes]** to place the request with an Active status. Click **[No]** to stop saving the request.
- **First available copy messages** – Your library may allow first available copy requests on specific issues of serials or specific parts of multi-part titles.
- **The item is in** – The item is available in the library. Click **[Yes]** to place the request. Click **[No]** to stop saving the request.
- **No matching patron record was found** – Click **[OK]** and check the patron barcode.
- **Patron blocks dialog box** – You can override the blocks and place the request, or cancel the request. From this dialog box, you can also view the Patron Status and the Patron Registration workforms to see more details about the blocks, and perhaps resolve them.
- **Duplicated Requests dialog box** – Click **[Yes]** to place a duplicate request for the patron. Click **[No]** to stop saving the request.
- **Outreach services patron** – This note may be displayed for the hold request if your library uses Polaris outreach services. It indicates that the hold request is for an active outreach services patron.

Place Single or Consecutive Hold Requests

After you have saved a hold request, you can place another request for the same patron or title using much of the information from the saved request. Follow these steps to place a single hold request or multiple hold requests consecutively.

1. Open the Hold Request workform from one of the following locations:

   - **Bibliographic Record** – Select **Tools, Place Hold** from the menu bar.
   - **Check In Workform** – Select **Tools, Place Hold** from the menu bar.
   - **Check Out Workform** – Select **Tools, Place Hold** from the menu bar.
   - **Find Tool Results list (patron, bibliographic, or item records)** – Right-click a record, and select **Place Hold** from the context menu.

   - **Holds Queue** – Click .
   - **Item Record** – Select **Tools, Place Hold** from the menu bar.
   - **Patron Registration workform** – Select **Tools, Place Hold** from the menu bar.
   - **Patron Status workform** – Select **Tools, Place Hold** from the menu bar.
   - **Polaris Shortcut Bar** – Select **File, New** from the Shortcut Bar. Then select **Hold Request** from the New dialog box, and click **[OK].**

   - **Request Manager (Hold Requests view)** – Click .
   - **Purchase Order workform, Line Items view** – Right-click a line item and select **Place Hold** from the context menu.

- **Purchase Order Line Item workform** – Select **Tools, Place Hold** from the menu bar.

The Hold Request workform appears.

2. In the **Pickup** box, select the branch where the patron wants to pick up the item. This will default to the library that owns the patron's barcode.

3. In the **Activation** box, select the date when the hold request should be activated. The activation date determines when items can trap to fill the request. You can change the activation to delay the request, as needed.

4. In the **Expiration** box, select the date after which the requested item is not needed. The Expiration date will be determined automatically by the library's settings. You can make a change as needed.

5. To input or change the requesting patron, use one of the following methods:

- Scan or type the patron's barcode in the Barcode box.
- Click the Patron **[Find]** to do a patron record search, right-click the record in the Results list, and choose **Select** from the context menu. The **Name, Barcode, Code,** and **Registered at** boxes are filled in.
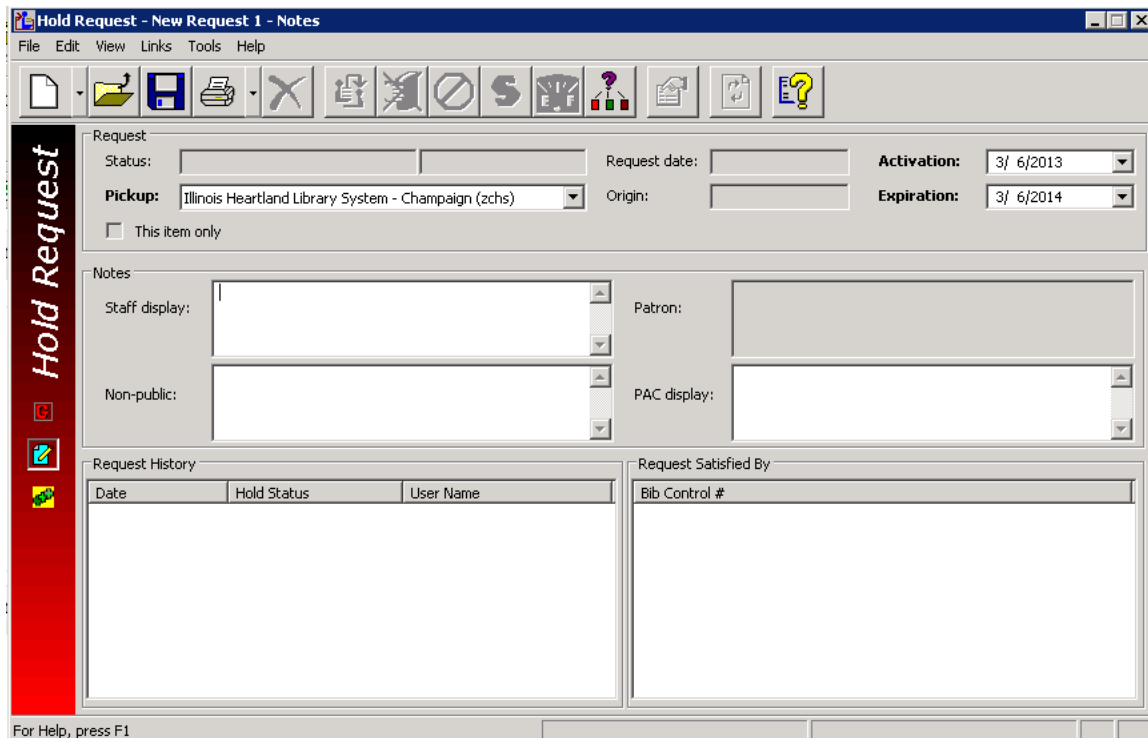
6. To select a title for the hold request, click title **[Find]** to do a bibliographic or item record search, right-click the record in the results list, and choose **Select** from the context menu.

NOTE! If you select a bibliographic-level serial title or a title with multiple parts and your library allows first available copy requests, a message appears. If the bibliographic record includes issue designations, you can select a specific issue. If there are no issue designations, you can select a specific item. If the bibliographic record is not a serial, but it has volume data, you can select a specific volume.

The applicable boxes in the Details frame are filled in.

7. If you want to enter notes for the hold request, select **View, Notes** or click [icon] to display the Notes view, and type the note as follows:

- If you want a note to appear on the hold slip, type the information in the **Staff Display** box. This note is also displayed in a message to staff when an item is trapped for a hold at circulation.
- If you want a note to be viewed online by staff only, but not appear on the hold slip, type the information in the **Non-public** box.
- If you have the permission, you can add or modify the PAC display note on the Hold Request workform – Notes view. This note is available to patrons in the PAC patron account – Requests page.
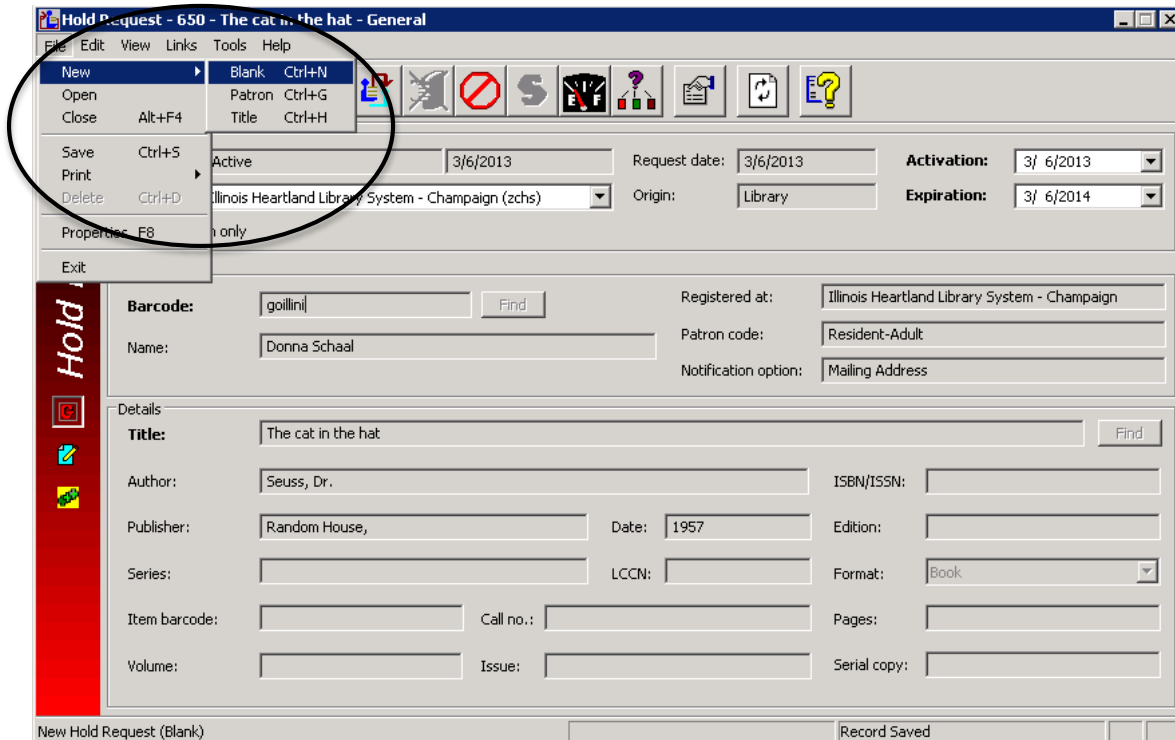
8. Click **File, Save** on the Shortcut Bar, or ![save icon], or press **CTRL+S** to save this record.

   The **Status (Active)** and **Request date** boxes are filled in. For item requests, the **This item only** check box is selected.

   If the hold request includes a note, the Notes view icon is yellow ![notes icon].

   On the Notes view, the **Request Satisfied By** list displays the items that can fill the hold request.

9. If you want to place another request, choose one of the following options:

   - Same title, different patron – Select **File, New, Patron**, or press **CTRL+G**. A new Hold Request workform appears with the same information in the Details frame boxes. The Patron frame boxes are blank.
   - Different title, same patron – Select **File, New, Title**, or press **CTRL+H**. The saved request closes. A new Hold Request workform appears with the same information in the Patron frame boxes. The Details frame boxes are blank.
   - Different title, different patron – Select **File, New, Blank**, or press **CTRL+N**. A new blank Hold Request workform appears.

Related Information

- Items relinked to a new bibliographic record – If an item is linked to a different bibliographic record after an item-level hold request is placed, the hold request is updated with the new bibliographic information.
- Request history – You can see the request's status as it passes from branch to branch in the Request-to-Fill (RTF) cycle. Each time the request passes to a different branch, the status is displayed as Pending. On the Hold Request workform, select View, Notes. Request history information is locating at the bottom of the Notes view. For Pending requests, the Branch column lists the current branch in the RTF cycle that has an item eligible to fill the request. For example, if the status is Pending and Library A is the listed branch, the request appears on Library A's RTF report.

Place Hold Requests – Multiple Patrons, One Title

If your library has patrons fill out request slips that you set aside for later processing, and several patrons have requested the same title, you can request the title once for all the patrons who want it. NOTE: This is very important – if you want to have multiple patrons on your request – you must start with the patron side of the request window. To retrieve a hold request workform, you can click on the icon in CKI, CKO or on the patron record, or you can highlight a title in a search, right-click, then click on Place Hold.

Once the Hold Request window is open, click the 3rd icon on the left hand sidebar to go to the multiple holds screen.

1. On the Hold Request workform, fill in the **Pickup** box, **Activation** box, and **Expiration** box. If you want to use a different pickup branch, activation date, or expiration date for a particular patron, you must change the setting for that patron's request after all the requests are created.

2. Select multiple patrons by doing the following steps:

   - To add a patron to the list, click or press **CTRL+R** to do a patron record search. Right-click the patron in the results list, and choose **Select** from the context menu.
   - Once multiple names has been selected, right-click in the results list, and choose **Select** from the context menu. The Multi-Request view appears with the selected patrons in the Patrons list. The Patrons list includes each patron's name, barcode, registration history, and patron code.

3. To edit the patron list, choose one of the following options:

- To add a patron to the list, click ⊹ or press **CTRL+R** to do a patron record search. Right-click the patron in the results list, and choose **Select** from the context menu.
- To remove one or more patrons, select the patrons in the Patrons list, and click ─ or press **CTRL+E**.

4. To select a title, do the following steps:

- Click ⊹ or press **CTRL+T** to do a bibliographic (or item) record search.
- Right-click the record in the results list, and choose **Select** from the context menu. The Multi-Request view appears with the selected title in the Titles list. For a bibliographic record, the title and author are included. For an item record, the title, author, material type, assigned branch, call number and barcode are included. If you want to select a different title, select the title in the Titles list, click ─ or press **CTRL+M** to delete it, and then click ⊹ to do a bibliographic record search.

5. If you want to input notes, fill in the appropriate boxes on the **Notes** view. If you want a different note for a specific request, you must change that request's note after all the requests are created.

6. Click **File, Save** on the Shortcut Bar, or , or press **CTRL+S** to save these requests.

7. If you want to edit a request, close the Hold Request workform and open the request. You must edit the requests individually. You cannot edit the requests at the same time.


Place Hold Requests – Multiple Titles, One Patron

Sometimes it is convenient to request multiple titles for one patron at once. For example, a patron may request several volumes in a series. NOTE: This is very important – if you want to have multiple items on your request – you must start with the item side of the request window. To retrieve a hold request workform, you can click on the icon in CKI, CKO or on the patron record, or you can highlight a title in a search, right-click, then click on Place Hold. Once the Hold Request window is open, click the 3rd icon on the left hand sidebar to go to the multiple holds screen.

1. On the Hold Request workform, fill in the **Pickup** box, **Activation** box, and **Expiration** box. If you want to use a different pickup branch, activation date, or expiration date for a particular patron, you must change the setting for that patron's request after all the requests are created.

2. Select multiple items by doing the following steps:

    - To add one or more titles, click or press **CTRL+T** to do a bibliographic or item record search. Select the appropriate titles in the results list, right-click in the results list, and choose **Select** from the context menu.
    - To remove one or more titles, select the titles in the Titles list, and click or press **CTRL+M**. If you want to select a different patron, select the patron in the Patrons list, click to delete the entry, and then click to do a patron record search.

3. To select the patron, choose one of the following options:

    - To add a patron to the list, click or press **CTRL+R** to do a patron record search. Right-click the patron in the results list, and choose **Select** from the context menu.

- To remove the patron, select the patron in the Patrons list, and click ⊏ or press **CTRL+E**.

4. If you want to input notes, fill in the appropriate boxes on the **Notes** view. If you want a different note for a specific request, you must change that request's note after all the requests are created.

5. Click **File, Save** on the Shortcut Bar, or 💾, or press **CTRL+S** to save these requests.

6. If you want to edit a request, close the Hold Request workform and open the request. You must edit the requests individually. You cannot edit the requests at the same time.

DISPLAYING HOLD REQUESTS

You can display a specific patron's hold requests, or any hold requests that meet selected criteria. The status of a hold request indicates the stage it has reached in hold processing:

- **Active** – When a hold request is placed in the queue, its status is automatically set to Active. All items that can fill the hold request are bound to it, and the items can be trapped to fill the request. The system is actively looking for items to fill the request. You can cancel an active request.
- **Cancelled** – Cancelled hold requests remain in the database and visible on Polaris workforms. A Cancelled request cannot be filled. However, you can reactivate it or delete it.
- **Expired** – If a hold request is not filled within the specified period of time, the request status automatically changes to Expired. And Expired request cannot be filled. However, you can reactivate or delete the request. You can run a report that lists Expired hold requests.
- **Held** – A Held request indicates that an item has been trapped to fill the request, and the item's circulation status is also Held. The item is ready for the patron to pick up.
- **Inactive** – An Inactive hold request has an activation date in the future. The request does not appear in the queue, and an item cannot be trapped to fill the request until the activation date. You can cancel or delete an Inactive request.
- **Not-supplied** – If no items can fill the request (for example, if no items are attached to the bibliographic record), the request status is Not-supplied. You can delete the request. You can also reactivate a Not-supplied request, but if the reason it was not supplied has not changed, the request becomes Not-supplied again.
- **Out** – An item has been linked to the hold request, and the item's circulation status has changed to Out.
- **Pending** – When an Active request can be filled by an item with a status of In at your library, or the request has been routed to another library that has the item
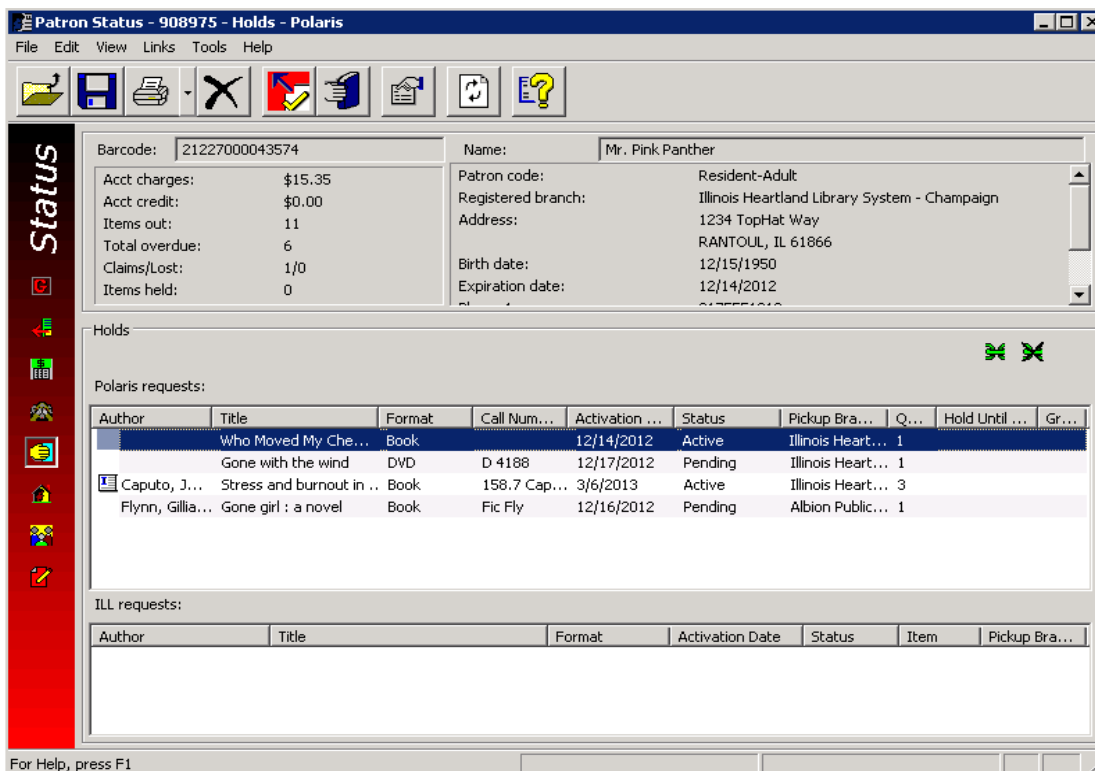
with a status of **In**, the status changes to Pending. If none of the items there have a status of **In**, the request keeps its Active status, and items can be trapped to fill the request.

- **Shipped** – A Shipped hold request status indicates that an item was trapped at a branch other than the pickup branch, and is being shipped to the pickup branch.
- **Unclaimed** – If the requesting patron does not pick up the held item within the specified period of time, the hold request status automatically changes from Held to Unclaimed. You can run a report that lists Unclaimed items.

Display a Patron's Hold Requests

Follow these steps to display the hold requests for a specific patron.

1. Select **Circulation, Patron Status** to find and display the patron's record in the Patron Status workform.

2. Select **View, Holds** or click to display the Requests view.

3. The patron's hold requests appear in the Requests List.

- If your library allows item-level or first-available-copy requests, these are indicated by the item-level icon at the beginning of the request line.

- The Queue column displays the patron's position in the holds queue for a title or item. The requests listed are filled by SHARE's policies regarding the hold queue.

Display Hold Requests by Selected Criteria

You can view hold requests by selecting criteria on the Request Manager workform – Hold Request view. This is the method you typically use to manage holds at your branch. Follow these steps to display the hold requests by selecting associated criteria.

1. Select **Circulation, Request Manager** from the Shortcut Bar. The Request Manager workform – Hold Requests view appears. By default, when the view opens, all pending requests for your branch are listed. These are the requests you fill or deny in daily holds processing.
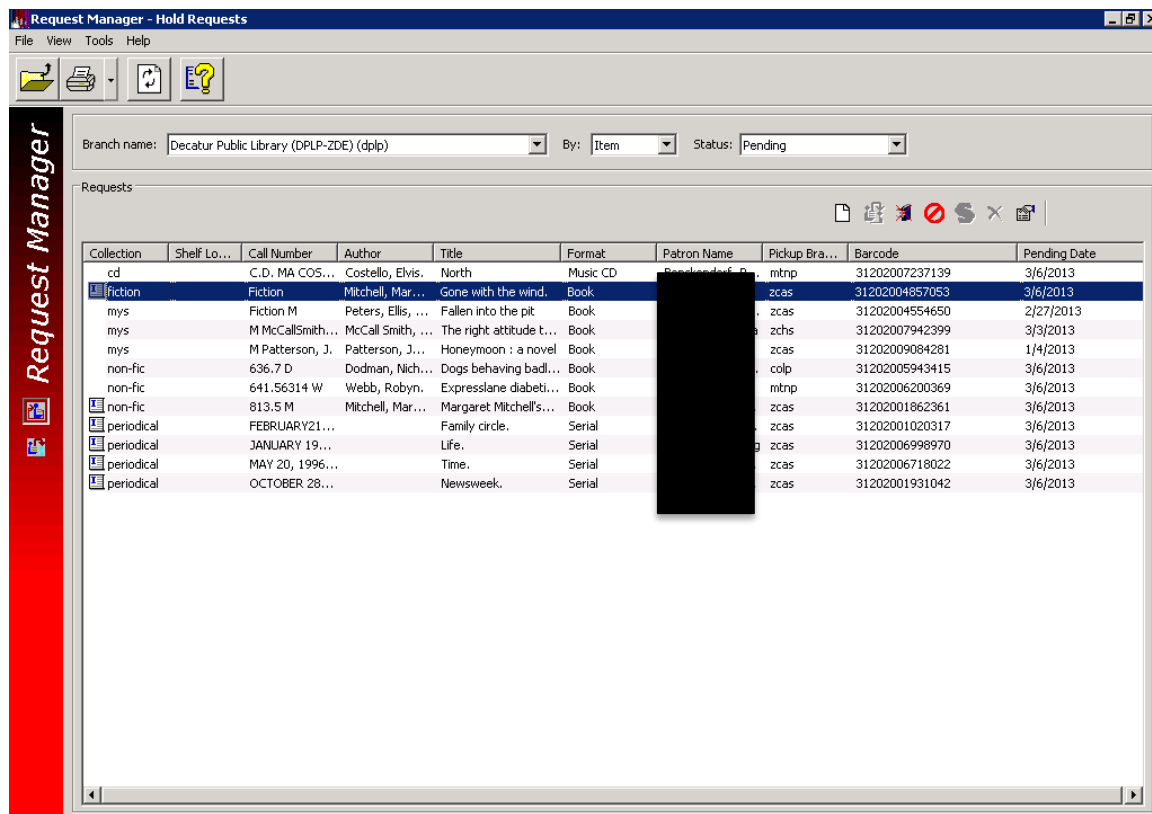
2. You can also see other holds based upon different selections in the drop down menus. Under the **By** drop down menu, you can select:

   - **Item** – Displays requests for items that are owned by the selected library.
   - **Patron** – Displays requests for patrons who are registered at the selected library.
   - **Pickup** – Displays requests to be picked up at the selected library.

3. Select a hold request status in the **Status** box. The Request Manager displays the request matching your criteria, in the Requests list. Item-level and first-available-copy requests are indicated by the item-level icon .
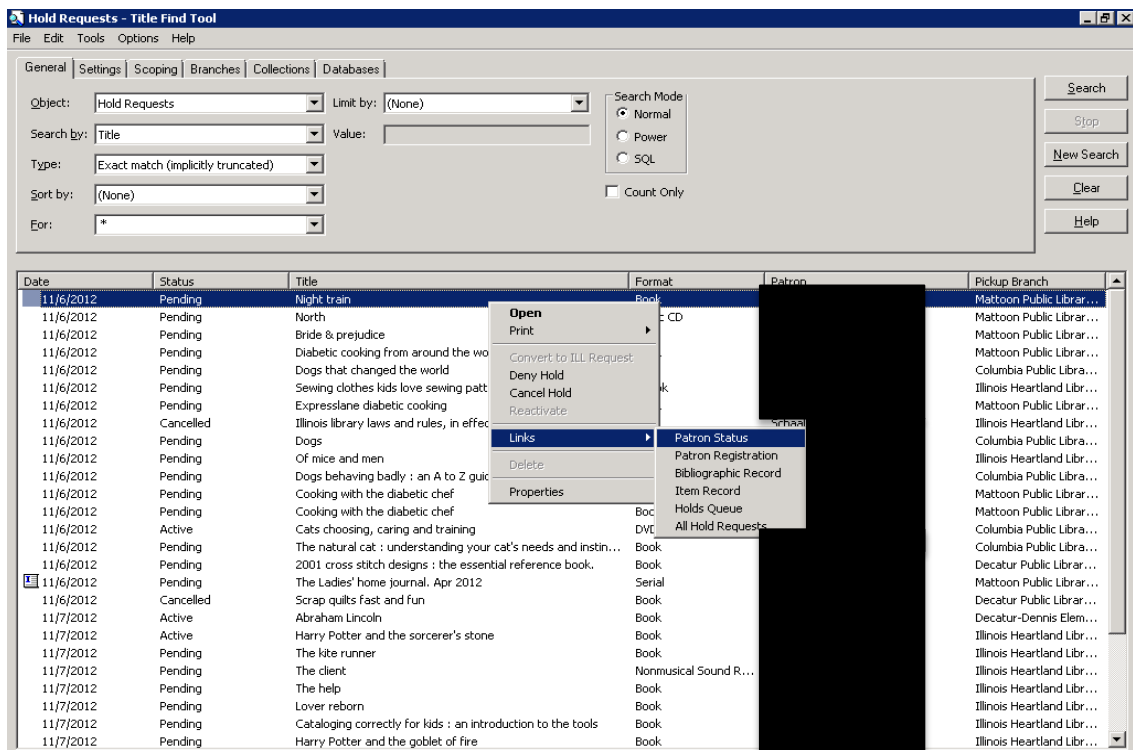
Find Hold Requests

Follow these steps to find hold requests using the **Find Tool**.

1. Select **Circulation, Hold Requests** from the Shortcut Bar. The General tabbed page of the Find Tool appears. Hold Requests is selected in the **Objects** box.

2. Select the criterion to search by in the **Search by** box.

3. Select the type of search in the **Type** box.

4. If you want your search results to be sorted, select the **Sort by** box and select a value.

5. Type a search string in the **For** box.

6. If you want to focus the search, select a limiter in the **Limit by** box, and set a value for the limiter in the **Value** box.

7. Click **Search** to begin the search, or press **[Enter].** Your results appear in the results list at the bottom of the Find Tool window. To load all the results in a large results list, press **CTRL+SHIFT+A**.

8. Do one of the following actions to work with an item in the results list:

   - Double-click a request line item to open the hold request.

   - Right-click a request line in the results to work with the request without opening it. The context menu displays the available options. Among other options, you can link to associated patron, bibliographic, or item records, to the holds queue for the associated title or item, or to all hold requests linked to the same title or item.

Display Requests Linked to a Bibliographic or Item Record

You can view all the hold requests linked to a bibliographic or item record, regardless of request status, and work with those requests. Follow these steps to see all the hold requests linked to a bibliographic or item record.

1. Open the list of linked requests by one of these methods:

   - **Bibliographic or Item Record workform** – Select **Links, All Hold Requests** from the menu bar.
   - **Hold Request workform** – Select **Links, All Hold Requests** from the menu bar.
   - **Holds Queue** – Select **Links, All Hold Requests** from the menu bar.
   - **Patron Status workform – Requests view** – Right-click the request, and select **Links, All Hold Requests** from the context menu.
   - **Find Tool results – hold requests** – Right-click the request, and select **Links, All Hold Requests** from the context menu.

   The Linked Hold Requests dialog box opens. The dialog box lists the hold requests associated with the record. Item-level and first-available-copy requests are indicated by the item-level icon .
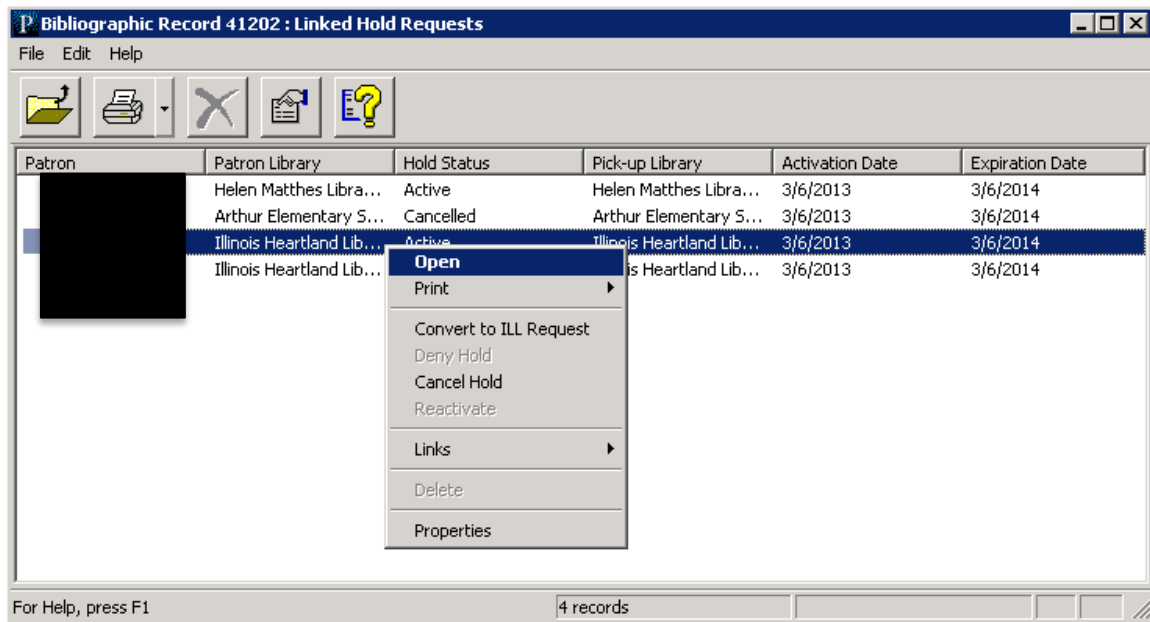
2. Double-click any line item to open the hold request, or select one or more line items and right-click to choose options from the context menu.

GROUPING A PATRON'S HOLD REQUESTS

If a patron wants any one of several requested titles, you can group the related hold requests. When one of the grouped requests is filled, Polaris automatically deletes the other requests in the group because they are no longer needed. The group is counted as a single request against the patron's total request limit.
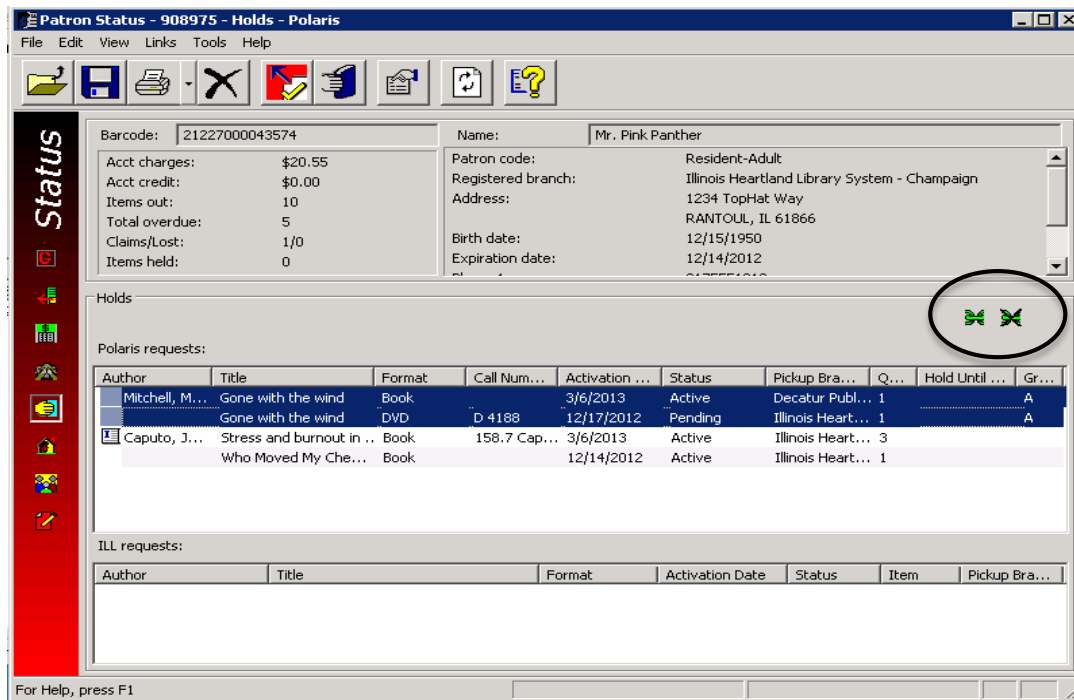
If the request status becomes Shipped, Polaris automatically cancels the other requests. When the shipped item is scanned at the pickup branch, the cancelled requests are automatically deleted. This prevents a second library from filling one of the requests after the first request is filled.

Group a Patron's Hold Requests

You can group hold requests with a status of Active, Inactive, or Pending. A group can contain requests with any or all these statuses, and you can add any number of hold requests to an existing group. Follow these steps to group hold requests.

1. Open the patron's record in the Patron Status workform – Requests view. The patron's hold requests you want to group.

2. Select the requests you want to group.

3. Click ![icon] or press **CTRL+G**. A letter is assigned to the new group. It appears in the Group column for each of the grouped requests. Use the horizontal scroll bar to see this column. The letter A is assigned to the patron's first group. If the patron already has a Group A, the letter B is assigned to the new group.

4. If you want to add one or more hold requests to an existing group, follow these steps:

   - Select any one request in the existing group.
   - Select the requests you want to add to the group.
   - Click ![icon].

Ungroup a Patron's Hold Requests

A group is automatically deleted if all but one request is ungrouped. This procedure does not delete the requests; it simply removes them from their groups. Follow these steps to remove one, multiple, or all requests from a group.

1. Open the patron's record in the Patron Status workform – Requests view.

2. Select the requests you want to remove from the group in the Requests list.

3. Click or press **CTRL+R**. The group letter will no longer appear in the Group column for the requests you have selected. Use the horizontal scroll bar to see this column.

MANAGING THE HOLDS QUEUE

The holds queue is the prioritized list of Active or Pending requests for a specific title or item. By default, hold requests are arranged from the oldest request at the top to the most recently created request at the bottom. The oldest request is usually filled first. However, you can manually change the order of the requests.

SHARE has implemented rules on how the hold queue will fill a request. The following will apply to all bibliographic-level holds:

- First Level – Your item; your patron. Then all of your library's buildings (example: a school district).
- Second Level – All SHARE libraries sorted by your delivery hub with libraries being listed by the frequency of their delivery (example: 5 day a week, then 4, then 3, then 2 and then on demand).

An individual item will be filled by the specific barcode through the owning library. NOTE: This is still a work in progress as SHARE staff continues to tweak the hold queue.

EDITING HOLD REQUESTS

After hold requests have been placed, you can edit them in the following ways:

- **Editing hold request data** – For example, a patron may ask you to change the pickup library for the requested material.
- **Transferring requests** – You can transfer active or inactive hold requests from one bibliographic or item record to another. For example, you may want to transfer a hold request from a bibliographic record with many hold requests to a record with few requests or more copies.
- **Cancelling/deleting requests** – If a patron no longer wants a requested title, you can cancel or delete the hold request manually. Whether you choose to cancel or delete requests depend on the situation, the request's status, and your library's policy.
- **Reactivating requests** – You can reactivate hold requests to permit items to fill them. When you reactivate a hold request, the request immediately becomes Active with a new expiration date, and items can be trapped for it.

Edit Hold Request Data

You can edit a hold request with any status for a patron, but the request status determines which information can be edited. For example, you can add or edit notes for all requests, but you can change the expiration date for Active, Inactive, and Pending requests only. You cannot edit the patron or bibliographic information for any hold requests. Follow these steps to edit a hold request:

1. Display the hold request you want to edit from one of the following locations:

   - **Hold Request Find Tool**.
   - **Patron Status workform – Requests view**.
   - **Request Manager workform – Hold Requests view.**
   - **Holds Queue workform** – Select **Circulation, Holds Queue** to find and display the queue for a specific bibliographic or item record.
   - **Bibliographic or Item Record workform.**

2. Right-click the hold request in the list, and select **Open** from the context menu. The illustration shows the Patron Status workform – Requests view.
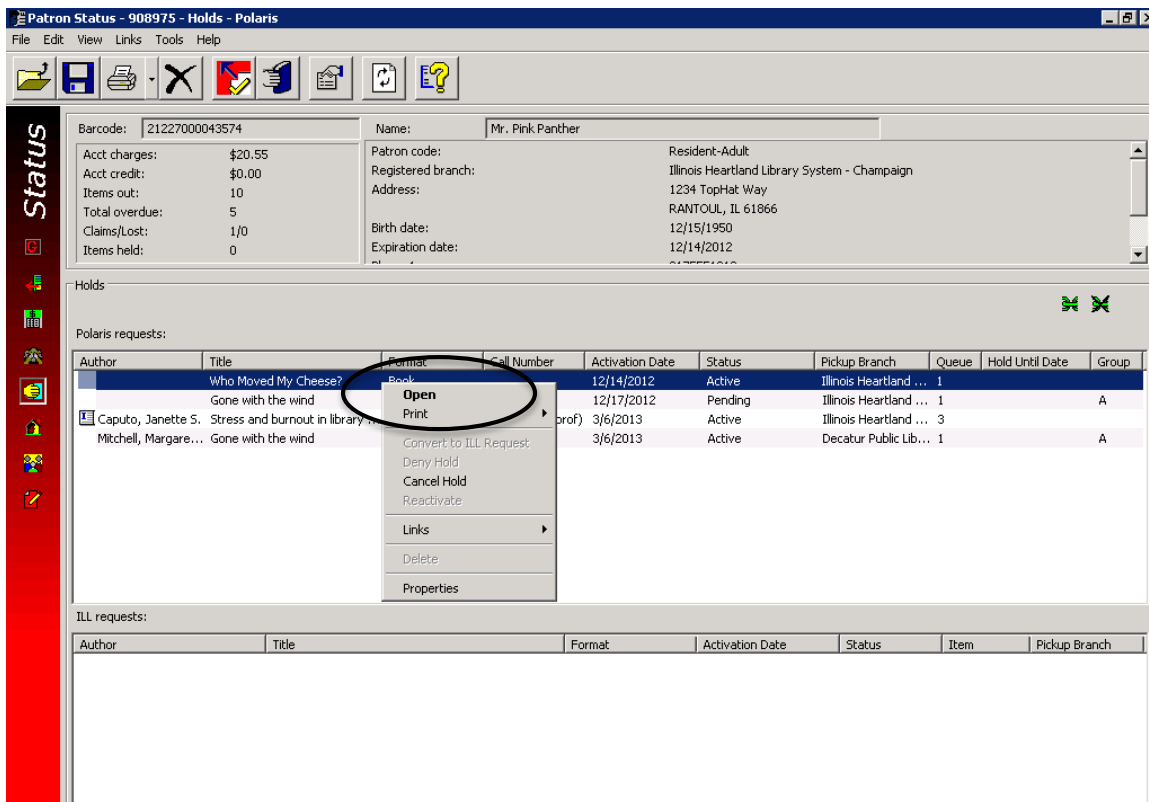
The Hold Request workform appears. The specific information fields available on the workform depend on the request's status.

3. Make changes, as needed.

- If you change the pickup library, certain policies regarding the holds request may change.
- You can change the unclaimed date for requests with a status of Held. If the pickup branch is closed on the new date, the unclaimed date is set to the next day the pickup branch is open when you save the request. A message informs you of the change.
- If you change the unclaimed date for a request with the status of Held, you will need to manually change the pickup slip. Cross out the old date on the slip and write in the new date.

4. Click **File, Save** on the Shortcut Bar, or , or press **CTRL+S** to save your changes.

Transfer a Hold Request

You can transfer Active or Inactive hold requests from one bibliographic or item record to another. For example, you may want to transfer a hold request from a bibliographic record with many hold requests to a record with fewer requests or more copies. A

transferred request is a new request. The pickup branch, activation date, expiration date, and patron data are transferred from the original request, but the original request's history is lost. When the transferred request is saved, the original is deleted, and the transferred request is placed at the end of the hold queue for the title, like any other new request. Follow these steps to transfer a hold request from one bibliographic or item record to another one.

1. Open the hold request you want to transfer in the Hold Request workform.

2. Select **Tools, Transfer** from the menu bar.

A message indicates that the request history will be lost.

3. Click **[Yes]** in the message box to continue with the transfer. A new Hold Request workform is displayed with the pickup branch, activation date, expiration date, and patron data from the original request. The Details frame boxes are empty.

4. To select a title/item, click Title **[Find]** to do a bibliographic or item record search, right-click the record in the Results list, and choose **Select** from the context menu. After you choose Select, the applicable boxes in the Details frame are filled in.

5. Add or edit information, as needed.

6. Click **File, Save** on the Shortcut Bar, or , or press **CTRL+S** to save the transferred request. The transferred request is placed at the end of the holds queue for the title. The original request is deleted.

 When a new bibliographic record replaces an existing record, any holds attached to the old record are transferred to the new record. These requests maintain their position in the queue.

Cancel Hold Requests

When you cancel a hold request, items can no longer fill the request. However, the request remains in the Polaris database and visible on workforms. For record-keeping purposes, you might choose to cancel rather than delete a request. Also, if a patron decides she wants a title after all, you can easily reactivate the cancelled request. You can manually cancel requests that are Active, Inactive, Pending, or Not-supplied. Follow these steps to cancel one or more hold requests.

1. Select **Circulation, Request Manager** from the Shortcut Bar. The Request Manager workform – Hold Requests view appears.

2. Select a library in the **Branch name** box and one of the following options in the **By** box, according to the requests you want to display:

    - **Item** – Displays requests for items that are owned by the selected library.
    - **Patron** – Displays requests for patrons who are registered at the selected library.
    - **Pickup** – Displays requests to be picked up at the selected library.

3. Select a hold request status in the **Status** box. You can cancel requests that are Active, Inactive, or Pending.

4. Select the requests.

5. Click above the Requests list, or press **CTRL+L**. The requests are no longer displayed because their status has changed to cancelled.

 You can also display the hold requests in the Patron Status workform – Holds view or the Holds Queue workform. Right-click the requests in the list, and select Cancel Hold from the context menu. In the Hold Request workform, you can select Tools, Cancel or click . In a Bibliographic

or Item Record workform, select Links, All Hold Requests, right-click the request in the Linked Hold Requests dialog box, and select Cancel from the context menu.

Related Information

- **Automatic Cancellation** – Hold requests may be cancelled *automatically* in certain circumstances:
  - Your library may automatically cancel an unclaimed request when the held item is checked in.
  - An item record is deleted, it is the last item attached to the bibliographic record, and Active, Inactive, or Pending request is bound to the title. A message indicates that deleting the item record cancels the request. If you continue, Polaris cancels the request.
- **Automatic Deletion** – Your library may automatically delete cancelled requests after a specified period.
- **Cancellation by Patrons –** Your library may allow patrons to view and cancel their hold requests from the PAC patron account.

Delete Hold Requests

When you delete a hold request, the request is removed permanently from the database. You can manually delete requests that are Cancelled, Expired, Inactive, or Not-supplied. Follow these steps to delete one or more hold requests.

1. Selection Circulation, Request Manager from the Shortcut Bar. The Request Manager workform – Hold Requests view appears.

2. Select a library in the **Branch name** box and one of the following options in the **By** box, according to the requests you want to display:

    - **Item** – Displays requests for items that are owned by the selected library.
    - **Patron** – Displays requests for patrons who are registered at the selected library.
    - **Pickup** – Displays requests to be picked up at the selected library.

3. Select a hold request status in the **Status** box. You can delete requests that are Cancelled, Expired, Inactive, or Not-supplied.

4. Select the requests.

5. Click ✕ above the Requests list, or press **CTRL+D**. A message alerts you that deleting a hold request removes it permanently from the database.

6. Click **[Yes]** to confirm that you want to delete the requests.

   Related Information

   - **Automatic Deletion** – Hold requests may be deleted *automatically* in certain circumstances:
   - **Automatic Deletion** – Your library may automatically delete Expired, Cancelled, and Not-Supplied requests after a specified period.

Reactivate Hold Requests

You can reactivate Cancelled, Expired, and Not-supplied hold requests to permit items to fill them. When you reactivate a hold request, the request immediately becomes active with a new expiration date, and items can be trapped for it.

1. Select **Circulation, Request Manager** from the Shortcut Bar. The Request Manager workform – Hold Requests view appears.

2. Select a library in the **Branch name** box and one of the following options in the **By** box, according to the requests you want to display:

   - **Item** – Displays requests for items that are owned by the selected library.
   - **Patron** – Displays requests for patrons who are registered at the selected library.
   - **Pickup** – Displays requests to be picked up at the selected library.

3. Select a hold request status in the **Status** box. You can reactivate requests that are Cancelled, Expired, or Not-supplied.

4. Select the requests.

5. Click above the Requests list, or press **CTRL+A**. The list shows requests with the status Cancelled, Expired, or Not-supplied, so the requests you reactivated are no longer displayed. Their status has changed to Active.

DAILY REQUEST PROCESSING

A recommended workflow is to review the status of hold requests once a day, using the Request Manager workform – Hold Requests view. This is important because other libraries may be requesting items from you, and activities may be taking place at other libraries that affect your patrons' requests.

Check the following requests every day:

- **Pending** – Requests from other libraries for items with a status of In at your library. The list of pending requests is also known as Requests-to-Fill (RTF).
- **Cancelled** – Delete or reactivate these requests.
- **Not-supplied** – Delete or reactivate these requests.
- **Unclaimed** – Pull these materials from the holds pickup shelf, and check them in.

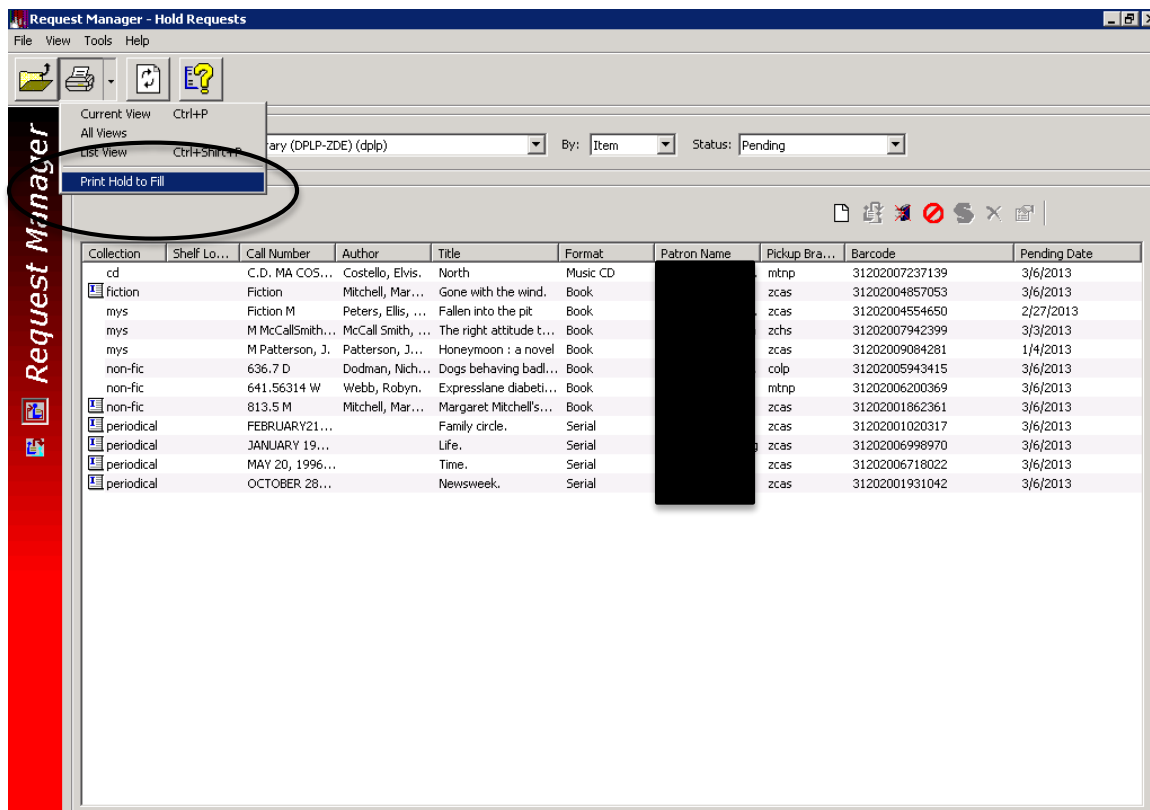**Manage Pending Hold Requests (Requests-to-Fill)**

Polaris processes requests-to-fill once a day, during overnight processing. You view or print the RTF report daily to see what items other branches are requesting. For each pending request, you either check in the item to change its status and send it to the pickup branch, or deny the request in Polaris.

Follow these steps to review and process pending hold requests.

1. Select **Circulation, Requests Manager** from the Shortcut Bar. The Request Manager workform – Hold Requests view appears. The view defaults to your library's pending requests.

2. Select **File, Print Hold to Fill** to print the RTF report. You can also print the workform list view. Select the column header by which you wish to sort the list, then select **File, Print, List View**.

The report is generated and the Report Preview window opens.
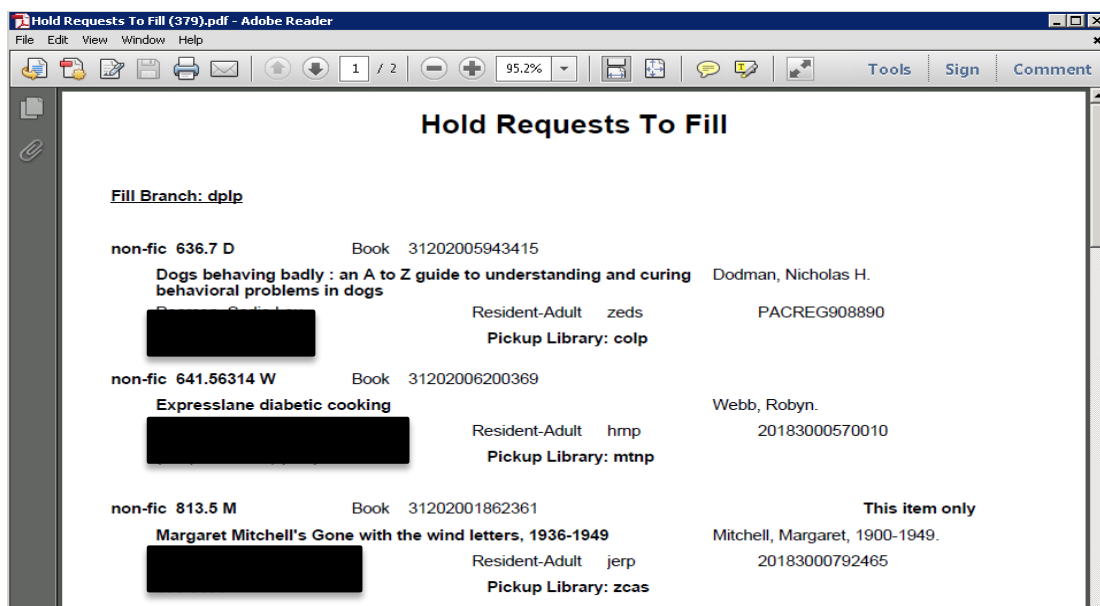
3. Click the printer icon. The report is printed on the default printer for your workstation. It lists the items at your branch with a status of In that can fill a pending hold requests. The report contains the same information as the Requests list in the Request Manager workform, as well as the requesting patron's patron code, registration branch, barcode, and phone number. Requests for specific items (item-level hold requests) are indicated by the text This item only.

4. Pull the requested items from the shelves.

5. Check in each item from one of the following locations:

   - Check In workform – Normal view.

   - Item record workform – Select Tools, Check In or click . A message asks whether you want to transfer the item to the pickup branch.

6. Click **[Yes].** The circulation status is Transferred, and the request status is Shipped.

7. Repeat 5-6 for each item you are supplying.

8. Band the item with the 4-letter library delivery code plus the 3-letter delivery hub. The 4 delivery hubs are: ZCA, ZCH, ZDE, and ZED. Ship each item to its pickup library, where the item will be checked in and held for pickup.

Deny Items for Requests-To-Fill (No Longer Recommended for SHARE Libraries)

If you cannot or do not want to fill a hold for RTF, you deny the item from filling the request. The request itself remains Active, and after the next RTF process runs, the request is routed to the next library in the sequence. This is part of your library's regular process of checking the RTF report. Follow these steps if you cannot or do not want to fill one or more hold requests.

1. Select **Circulation, Requests Manager** from the Shortcut Bar. The Request Manager workform – Hold Requests view appears. The view defaults to your library's pending requests.

2. Select the items in the Requests list that you want to deny for hold.

3. Click or press **CTRL+R**. The Deny Item for Hold Request dialog box appears.

4. Select the reason for not supplying the item or items. If you have the same reason for denying several or all holds, deny these items at the same time. If you have different reasons, deny the items separately.

5. Do one of the following actions:

   - To prevent this particular item or items from filling the request, simply click **[OK].** In this case, if your branch has other items that could fill the request, the request may appear again on the RTF list during the next RTF cycle.
   - Select Deny all available items at this branch, and click **[OK].** In this case, the request does not appear again on the RTF list, even if your branch has other items that could fill the request.

     The Hold Requests view is displayed, but the request you denied no longer appears. After the RTF process is run, the request appears on the RTF list of the next library in the holds routing process.

   Related Information

   - **Ignoring an RTF item** – If you take no action on an item in the Requests list, it is automatically routed to the next branch in the sequence.
   - **Viewing a Not-supplied reason** – You can view a Not-supplied reason for a patron's hold request on the Hold Request workform – Notes view. Scroll the Request Satisfied By list to the right. The far column is Not Supplied Reason. If a request was denied, an icon appears next to the bibliographic record control number. The icon is red for a request denied by a staff member, and blue for a request denied by the system. The system may deny a request from the PAC if a patron has exceeded the request limit for an item's material type and all the items attached to the bibliographic record are this material type.

Manage Cancelled Hold Requests

Follow these steps to delete or reactivate Cancelled hold requests.

1. Select **Circulation, Request Manager** from the Shortcut Bar. The Request Manager workform – Hold Requests view appears.

2. Select a library in the **Branch name** box, **Patron** in the **By** box, and **Cancelled** in the **Status** box.

3. Click to delete the requests or click to reactivate them.

Manage Not-supplied Hold Requests

Follow these steps to delete or reactivate Not-supplied hold requests for your patrons.

1. Select **Circulation, Request Manager** from the Shortcut Bar. The Request Manager workform – Hold Requests view appears.

2. Select a library in the **Branch name** box, **Patron** in the **By** box, and **Not-supplied** in the **Status** box.

3. Delete, reactivate, or convert the requests:

   - Click to delete the requests.
   - Click to reactivate the requests.

Manage Unclaimed Hold Requests

The item status changes from Held to Unclaimed at 11:59 p.m. on the hold request's unclaimed date if the item is not picked up. The unclaimed date is determined by the Maximum days held for pickup setting for your library. Dates closed are taken into account in the calculation.

Follow these steps to manage Unclaimed hold requests for items that were supposed to be picked up at your branch, but were not picked up.

1. Select **Circulation, Request Manager** from the Shortcut Bar. The Request Manager workform – Hold Requests view appears.

2. Select a library in the **Branch name** box, **Pickup** in the **By** box, and **Unclaimed** in the **Status** box.

3. Pull the unclaimed materials from the holds pickup shelf.

4. Check in each item.

All unclaimed requests are automatically deleted or cancelled when the held items are checked in, depending on your library's policy.

FILLING HOLDS AT CIRCULATION

If an item that fills a hold request is scanned during circulation, you can choose to hold the item for the requesting patron. If you hold the item, the item is trapped, and the

request is filled. The patron has a library-defined number of days to pick up the item before its request status becomes unclaimed.

If you choose not to hold an item for a request, you can either reactivate or cancel the hold request. If you reactivate the request, items can still be trapped to fill it, including the item you just denied for the hold. If you cancel the request, items cannot be trapped to fill it. However, you can manually reactivate a cancelled request at any time.

Fill a Hold Request at Circulation

You may have received an item from another library to fill a request, or you may be alerted to the item during other circulation tasks. Follow these steps to fill a hold request at circulation, usually during the check in process.

1. Check in an item from one of the following locations:

    - **Check In workform – Normal view.**
    - **Check In worform – Bulk view.**
    - Item Record workform (select **Tools, Check In**, or click).

    A message appears.

2. If your branch is not the pickup library, the message asks whether you want to transfer the item to the pickup library for a hold. Click **[Yes],** and ship the item to the library, where it will be checked in and held. The circulation status is Transferred, and the request status is Shipped.

3. If your branch is the pickup library, the message asks if you want to hold the item. Click **[Yes].** If there is a display note in the hold request, a second message shows the note. Click **[OK].**

The following events occur automatically:

- The circulation status and the request status change to Held.
- A hold slip prints if hold slip printing has been set up for this workform.
- Polaris produces a hold notice to notify the patron that the item is available for pickup.

Related Information

- **The hold request for...needs to be either reactivated or canceled –** To reactivate the request, click [Yes]. To cancel the request, click [No].

- **This item cannot be checked out, because it is being held** – To override the hold and continue with check-out, click [Yes], and a message asks if you want to reactivate the hold request. To stop the check-out, click [No].
- **This item is held for…Continue to hold the item?** – To continue the current hold, click [Yes]. To continue the circulation process, click [No}. If the item can fill another request, a message indicates that this item satisfies a hold request.
- **Outreach services patron** – This note may appear on a holds message if your library uses Outreach Services. It indicates that the item fills a hold request for an outreach services patron.

Fill a Hold Request with Fill Now

You might use the Fill Now function if the item with which you want to fill the request is not identical to what has been requested. Also, you might use it for an item that would be restricted from filling the request under normal circumstances.

1. Open the hold request you want to fill in the Hold Request workform.

2. Click , press **CTRL+F**, or select **Tools, Fill Now** from the menu bar. The Scan/Enter Item Barcode dialog box appears.

3. Scan the item's barcode in the **Item barcode** box. The following events occur automatically:

   - The circulation status and the request status change to Held.
   - A hold notice will notify the patron that the item is available for pickup.

4. If a message asks whether you want to transfer the item to the pickup library, click **[Yes],** and ship the item to the library, where it will be checked in and held. If you have set up printing for in-transit slips from this workform, the slip is printed automatically.

The following messages may appear when you fill a request with the Fill Now function. Follow the instructions:

- **The item is designated not-holdable** – To fill the request with the item, click [Yes]. To stop filling the request, click [No].
- **This item is held for . . . Continue to hold the item?** – To continue the current hold, click **[Yes].** To continue the circulation process, click **[No].** If the item can fill another request, a message indicates that this item satisfies a hold request.
- **Transfer this item to** *library* **for hold?** – To transfer the item, click **[Yes].** If you do not want to transfer the item, click **[No].**