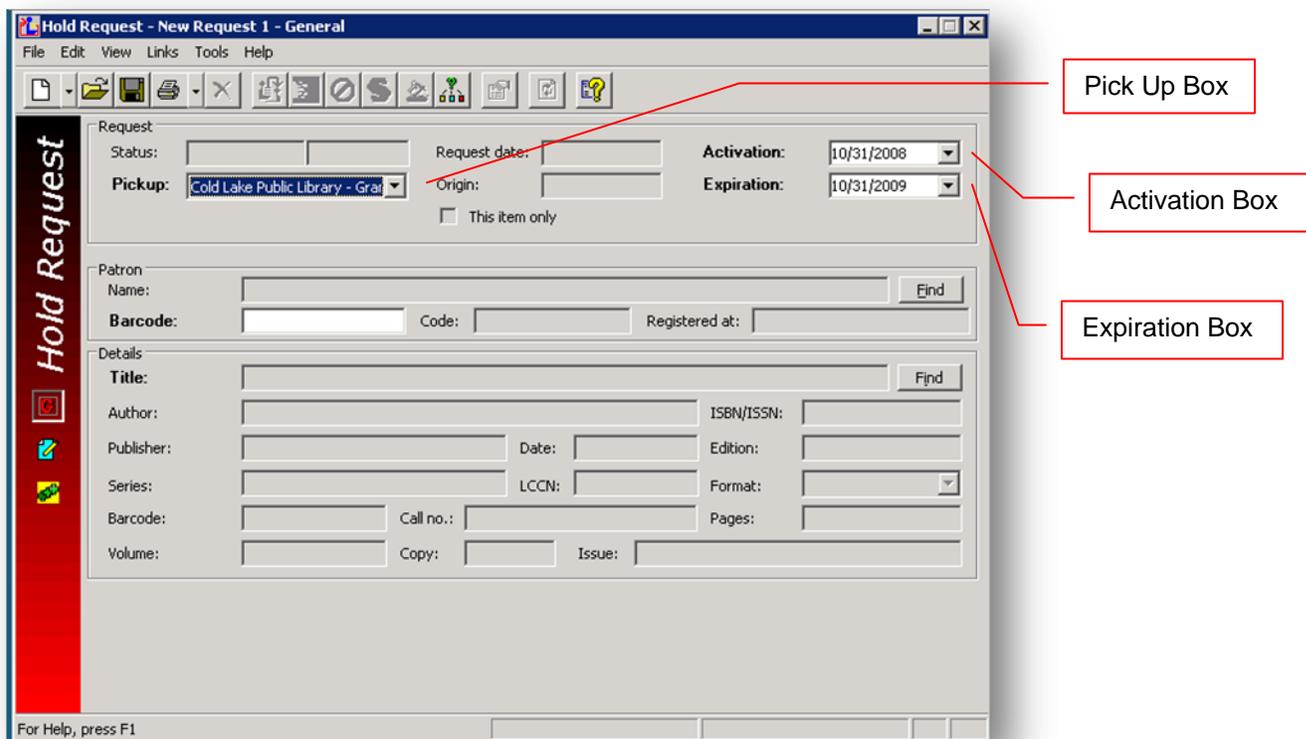# Placing Hold Requests

About: Placing a hold for one or more titles for a patron or the same title for multiple patrons.

Single or Consecutive Hold Request

Holds can be placed from a number of locations:

1. Click ![button] to display the Hold Requests workform. This button appears on the Check Out, Check In, and Patron Status workforms. You may also use **CTRL+ h** while in these workforms.

2. Select the branch where the patron wants to pick up the item in the **Pickup** box.

3. In the **Activation** box, select the date when the hold request should be activated.

4. In the **Expiration** box, select the date after which the requested item is not 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 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.

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6. To select a title for the hold request, click Title **Find** to do a bibliographic or item record search, type title in **For** box and hit **Enter** or click on **Search**, right-click the record in the results list, and choose **Select** .

> **Tip:**
> You can preview a bibliographic record and the items linked to it before you select it for the hold request. Right-click the record in the Find Tool results list, and select **Preview.** After you choose **Select**, 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 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 **Display** box.
- If you want a note to be viewed online by staff only, and *not* appear on the hold slip, type the information in the **Staff** box.

8. Select **File > Save** to save the request.
- On the Notes view, the **Request Satisfied By** list displays the items that can fill the hold request.

> **Important:**
> If you are placing consecutive requests, do not close the workform.

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

- To request the same title for a 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.
- To request a different title for the 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.
- To request a different title for a different patron, select **File > New > Blank**, or press **CTRL+ n**. A new blank Hold Request workform appears.

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Multiple Patrons, One Title

1. Repeat steps 1-4 (single or consecutive request)

2. Select multiple patrons by doing the following steps:
    a) Click the patron **Find** button to search for the first patron record.
    b) Select the appropriate records in the results list.
    You must select more than one patron to set up the multiple request.
    You can delete patrons from the multi-request later (see step 3).
    c) Right-click in the results list, and choose **Select.**
    The Multi-Request view appears with the selected patrons in the
    Patrons list. The Patrons list includes each patron's name, barcode,
    registration library, and patron code.

3. To edit the patron list, choose one of the following options:
    - To add a patron to the list, click **+** (plus) sign in patron box and use Patron Select Tool
    - To remove one or more patrons, select the patrons in the patron list, and click **–** (minus) sign

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

    a) Click **+** (plus) sign in Titles box to do a bibliographic (or item) record search.
    b) Right-click the record in the Results list, and choose **Select**
        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.
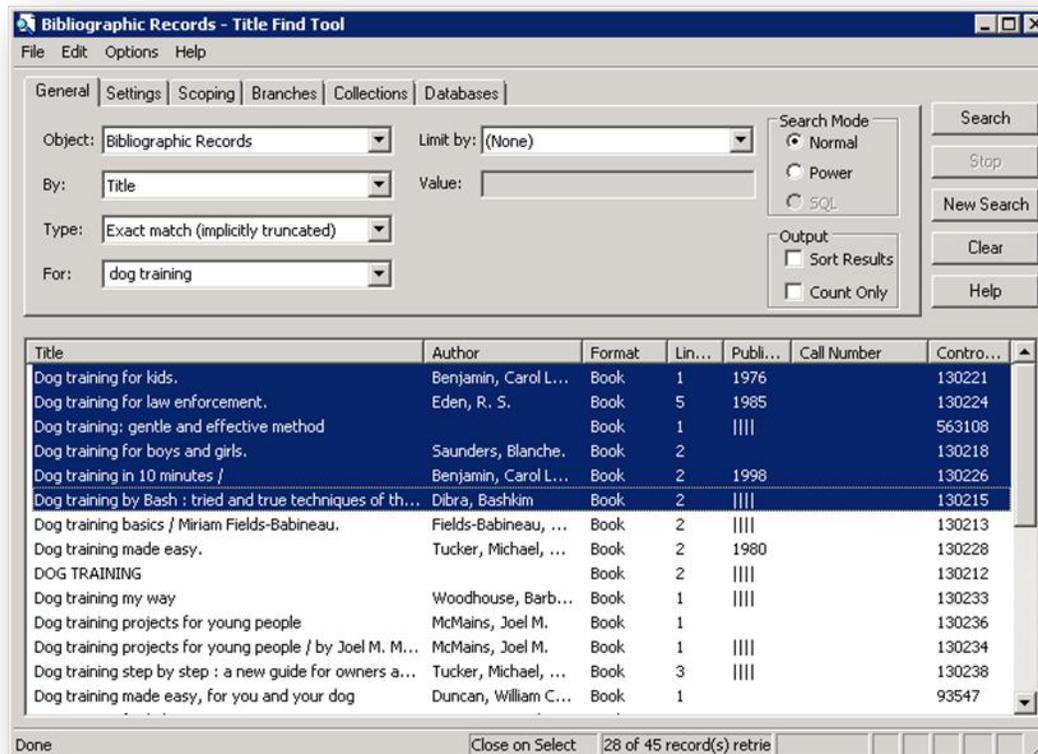
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> **Note:**
> If you want to select a different title, select the title in the Titles list, click **–** (minus) sign to delete it, and click **+** (plus) sign to do a bibliographic record search.

5. If you want to input notes, fill in the appropriate boxes on the Notes view

6. Select **File > Save** to save the requests.
The requests are saved as several individual 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 all the requests at the same time.

Multiple Titles, One Patron

1. Repeat steps 1-4 (single or consecutive request)

2. To input or change the requesting patron, choose one of the following options:
  - Scan the patron's barcode in the **Barcode** box.
  - Click Patron **Find** to do a patron record search, right-click the record in the Results list, and choose **Select.**
    The **Name**, **Barcode**, **Code**, and **Registered at** boxes are filled in.

3. Select multiple titles by doing the following steps:
  a) Click the Bibliographic **Find** button to search for the first titles.
  b) Select the appropriate records in the Results list.
  You must select more than one title to set up the multiple request. You can delete titles from the multi-request later (see step 4).
  c) Right-click in the Results list, and choose **Select.**
  The Multi-Request view shows the selected patron in the Patrons list and the selected titles in the Titles list. For bib records, the title and author are included. For item records, the title, author, material type, assigned branch, call number, and barcode are included.

4. If you want to modify the Titles list, choose one of the following
options:

- To add one or more titles, click or press **+ sign** to do a
  bibliographic record search. Select the appropriate titles in the
  results list, right-click in the results list, and choose **Select**
- To remove one or more titles, select the titles in the Titles list, and
  click or press **– sign**

5. If you want to input notes, fill in the appropriate boxes on the Notes
view.

6. Select **File > Save** to save the requests.
The requests are saved as several individual 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 all the requests at the same time.

Hint:
Don't forget you can press F1 at any time to bring up a help screen

Placing Hold Requests

Processing Hold Requests (Request Manager)

Polaris processes requests-to-fill once a day, during overnight processing. You view or print the Requests-To-Fill (RTF) report daily to see what items other branches are requesting from you. For each pending request, you either check in and send the item to the pickup branch, or deny the request in Polaris. Your library system determines how many days you have to respond to a request before it is routed to the next library in the sequence and no longer displays in your RTF list.
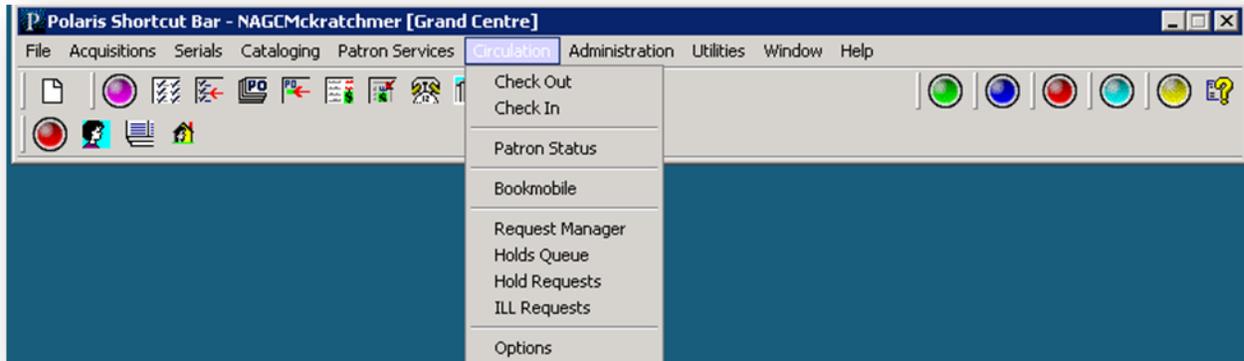
Follow these steps to review and process pending hold requests regularly,
usually daily.

1. Select **Circulation > Request Manager** from the Polaris Shortcut Bar. The Request Manager workform - Hold Requests view appears.

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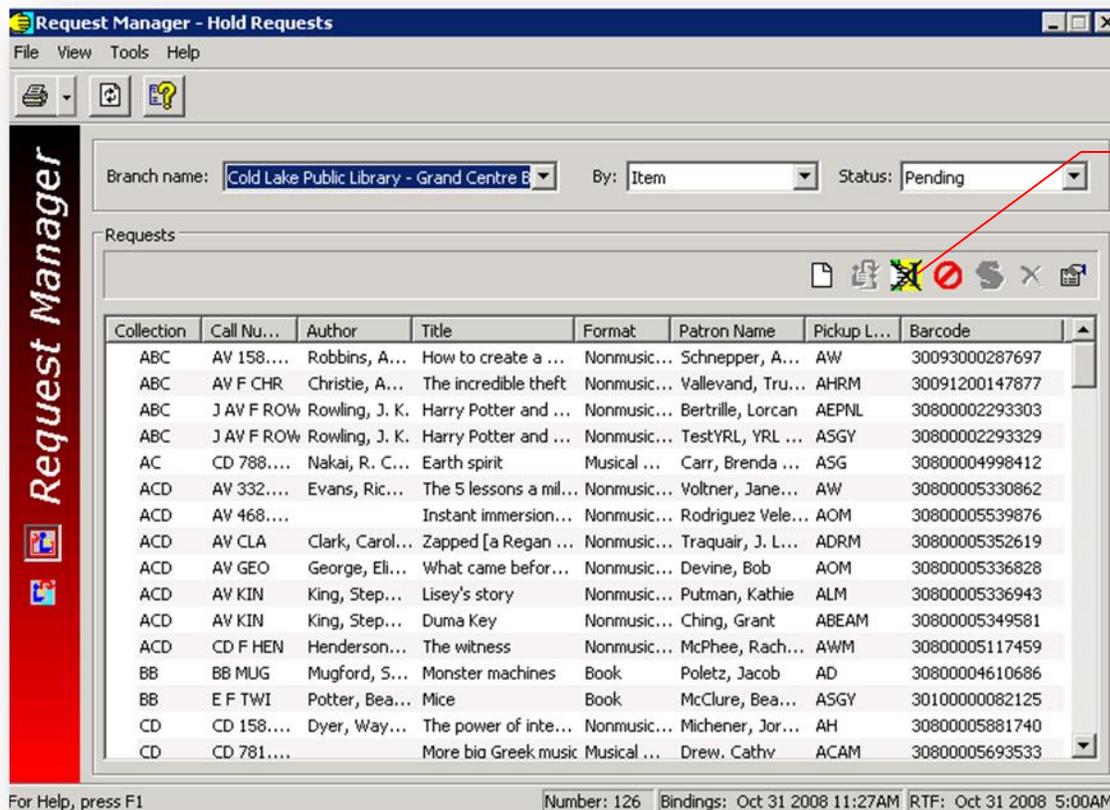
Note: When the view opens, the pending requests for your branch are listed. If the view is already open and they are not listed, select your branch in the **Branch name** box, **Item** in the **By** box, and **Pending** in the **Status** box.

2. Print the Requests-To-Fill report.

3. Fill (pull requests and check in) or deny items (or highlight title and right click, Deny Hold) for RTF.

Important:
If you take no action on a pending request, the request is routed automatically to the next library in the RTF sequence after a library-defined number of days.