Holds Lab – 3 Multiple Holds and Grouping Holds

1 – Log In and Open the Patron Record
1.1 Navigate to training Leap (https://ccs-training.polarislibrary.com/leapwebapp)
1.2 Sign in and select the appropriate branch and workstation.
1.3 Use the Quick Search Bar or Find Tool to locate the patron record you used in Holds Lab-1 and Holds Lab-2.

2 – Place Multiple Holds on Different Titles
2.1 Navigate to the patron's HOLDS/HELD tab.
2.2 Click on the MORE drop-down menu.
2.3 Click on MULTIPLE HOLDS.
2.4 If any block alerts appear, click CONTINUE.
2.5 Click ADD TITLES.
2.6 Double-check the Find Tool is set to search Bibliographic Records.
2.7 Perform a search. *Tip: for this exercise, search for a topic or series that will provide a large pool of results, such as cooking, computer programming, Harry Potter, James Patterson, etc.*
2.8 Select the checkbox next to three to four different titles.
2.9 Click OPEN.
2.10 Click PLACE HOLD to complete placing the holds.
2.11 Close the patron record.

3 – Place Multiple Holds on the Same Title (Bookclub Holds)
While there are different ways to place multiple holds on the same title, we will use the method outlined in the document, "Polaris Holds: Multiple Holds and Grouping Holds."

3.1 Open the Find Tool.
3.2 Search for a Bibliographic Record. This can be a favorite or well-known book, movie, or CD. *Tip: look for a title that is older and won't have new material restrictions.*
3.3 Open the Bibliographic Record.
3.4 Copy the CONTROL NUMBER.
3.5 Use the Quick Search Bar or Find Tool to locate the patron record you used in the previous section.
3.6 Navigate to the HOLDS/HELD tab.
3.7 Click on the MORE drop-down menu.
3.8 Click on MULTIPLE HOLDS.
3.9 If any block alerts appear, click CONTINUE.
3.10 Click ADD TITLES.

3.11 Set the Find Tool up for multiple hold use. Set the Record Type to BIBLIOGRAPHIC RECORDS and the Qualifier to CONTROL NUMBER. Click the STAR icon at the end of the search bar and SAVE the setup.
3.12 Paste the CONTROL NUMBER.
3.13 Click ENTER to locate the title.
3.14 Click ENTER again to add the title to the list.
3.15 Click ADD TITLES.
3.16 REPEAT steps 3.12-3.15 five times. You should now have 5-6 entries on the list of holds.
3.17 Scroll down to the NOTES section.
3.18 Add a STAFF DISPLAY NOTE to indicate the date of the book club meeting. Include today's date, your initials, and your library's 3-letter code.
3.19 Click PLACE HOLD to complete placing the holds.

We will use the holds you just placed in Section 4.

4 – Grouping Holds
4.1 In the patron's record, navigate to the HOLDS/HELD tab.
4.2 Click the checkboxes next to three holds. These will be the holds we group together.
4.3 Click on the MORE drop-down menu.
4.4 Click ADD TO GROUP.
4.5 You should now see a letter in the "Group" column for these three holds.

5 – Adding an Additional Hold to a Group
5.1 In the patron's record, navigate to the HOLDS/HELD tab.
5.2 Click the checkbox next to a hold that is not yet in a group.
5.3 Click the checkbox next to a hold that is part of Hold Group A.
5.4 Click on the MORE drop-down menu.
5.5 Click ADD TO GROUP.
5.6 You should now see the letter A in the "Group" column for the single hold.

6 – Removing a Hold from a Group
6.1 In the patron's record, navigate to the HOLDS/HELD tab.
6.2 Click the checkbox next to a hold that is part of Hold Group A.
6.3 Click on the MORE drop-down menu.
6.4 Click REMOVE FROM GROUP.
6.5 You should no longer see the letter A in the "Group" column for this hold.