Holds Lab – 2 Modifying Holds

In this lab, we will be modifying the holds we placed in Holds Lab-1.

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.

2 – Pause a Hold

2.1 In the patron's record, navigate to the HOLDS/HELD tab.
2.2 Click the entry for a hold that has a status of "Requested" or "Locating." This will open the Hold Request Record.
2.3 In the DETAILS tab, click on the ACTIVATION date field.
2.4 Use the calendar to select a date in the future.
2.5 Click SAVE. The hold is now paused.
2.6 Click CLOSE to go back to the patron record.

3 – Un-Pause a Hold

3.1 In the patron's record, navigate to the HOLDS/HELD tab.
3.2 Click the entry for a hold that has a status of "Paused." This will open the Hold Request Record.
3.3 In the DETAILS tab, click on the ACTIVATION date field.
3.4 Select today's date on the calendar.
3.5 Click SAVE. The hold is now un-paused.
3.6 Click CLOSE to go back to the patron record.

4 – Change a Pickup Location

4.1 In the patron's record, navigate to the HOLDS/HELD tab.
4.2 Click the entry for a hold that has a status of "Requested," "Locating," or "Paused." This will open the Hold Request Record.
4.3 In the DETAILS tab, click on the PICKUP drop-down menu.
4.4 Select a different library branch.
4.5 Click SAVE. The hold will now be sent to a different location for pickup.
4.6 Click CLOSE to go back to the patron record.

5 – Cancel Holds

5.1 In the patron's record, navigate to the HOLDS/HELD tab.
5.2 Click the checkboxes next to two holds that have statuses of "Requested," "Locating," or Paused.
5.3 Click the CANCEL button.
5.4 Both holds should now have a status of "Cancelled."

6 – Reactivate a Hold
6.1 In the patron's record, navigate to the HOLDS/HELD tab.
6.2 Click the checkbox next to one hold that has a status of "Cancelled."
6.3 Click the REACTIVATE button.
6.4 The hold should now have a status of "Requested" or "Locating."

7 – Delete a Hold
7.1 In the patron's record, navigate to the HOLDS/HELD tab.
7.2 Click the checkbox next to one hold that has a status of "Cancelled."
7.3 Click the DELETE button.
7.4 Click CONTINUE to complete deleting the hold.
7.5 The hold should no longer appear on the patron's list of holds.

8- Fill Now
Typically, when using Fill Now, staff will have an item in hand to use. Because we are training and working with in a hypothetical situation, we will need to improvise slightly. Select one of the following options to use with this section and Section 9:

1. Use an item from your location with a scannable barcode.
2. Copy-and-paste or key in a barcode. Locate an item in the database and copy the barcode or write it down for reference so you can key in the numbers later.

8.1 In the patron's record, navigate to the HOLDS/HELD tab.
8.2 Click the checkbox next to one hold that has a status of "Requested" or "Locating."
8.3 Click FILL NOW.
8.4 Scan, paste, or key in the item barcode.
8.5 Click OK
8.6 The hold status should now be "Ready for Pickup."
8.7 Close the patron record.

9 – Cancelling a Ready for Pickup Hold

In this section, we will cancel the hold we filled in Section 8.

9.1 From the Leap home screen, click CHECK IN.

9.2 Scan, paste, or key in the item barcode from Section 8.

9.3 A “Continue Holding Item” pop-up will appear.

9.4 Click NO to stop holding the item.

9.5 If prompted to place the item in-transit or hold for a different patron, say YES. The item is no longer on hold for the patron.

9.6 Click CLOSE to close the Check In workform.