Polaris Holds:
Placing Holds in Leap

This guide is an introduction to the following topics:
- Placing a bib-level hold in Leap from a bibliographic record
- Placing an item-level hold in Leap from an item record
- Placing a bib-level hold in Leap from a patron’s record
- Placing an item-level hold in Leap from a patron’s record
- Identifying a bib-level hold vs an item-level hold
- How to modify the hold settings when placing a hold

Placing a Bib-Level Hold in Leap
To place a bib-level hold in Leap, a hold needs to be placed from the bibliographic record. By placing a bib-level hold, any eligible item linked to the bib record may fill the hold.

1. Use the Find Tool to locate the desired bibliographic record.

2. Expand the Actions drop-down menu and select Place Hold.
3. Select the patron.
   a. The patron Find Tool will open; locate the patron record.
   b. If a patron record is open in a background workform, select it from the pop-up list. If the list does not include the correct patron, select **Find Tool** to search.

4. Once a patron record is selected, their record will open to the “Holds/Held” tab. Make any necessary modifications to the hold settings if needed.

5. Select **Place Hold**. If successful, a pop-up will appear at the top of the screen that reads, “The hold request has been created.”

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Placing an Item-Level Hold in Leap
To place an item-level hold in Leap, a hold needs to be placed from the item record. By placing an item-level hold, the request can only be filled by that specific item.

1. Use the Find Tool to locate the desired item record.

2. Expand the Actions drop-down menu and select Place Hold.

3. Select the patron.
   a. The patron Find Tool will open; locate the patron record.
   b. If a patron record is open in the background, select it from the pop-up list. If the list does not include the correct patron, select Find Tool to search for the patron.

4. Once a patron record is selected, their record will open to the “Holds/Held” tab. Note that the item’s barcode has been automatically input into the “Barcode” field. Make any necessary modifications to the hold settings if needed.

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5. Select **Place Hold**.
   a. If successful, a pop-up will appear at the top of the screen that reads, “The hold request has been created.”

![Image of a pop-up message saying the hold request has been created.](image-url)
Placing a Bib-Level Hold from a Patron’s Record in Leap

1. Open the patron’s record and navigate to the Holds/Held tab.

2. Select New Hold.

3. Identify the title.
   a. Type the title in to the “Title” field and hit enter. Select the appropriate title from the results list.
   b. Or, select the Find Tool to configure a search. Select the appropriate title from the results list.
   *Note - staff are not able to access the full bibliographic record from here. Instead, selecting a record will populate the hold request.

4. Modify the settings (activation date, pickup location, notes, etc.) as necessary.

5. Select Place Hold. If successful, a pop-up will appear at the top of the screen that reads, “The hold request has been created.”

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Placing an Item-Level Hold from a Patron’s Record.

1. Open the patron’s record and navigate to the **Holds/Held** tab.

2. Select **New Hold**.

3. Identify the item.
   a. Type or key in the barcode into the Barcode field. Hit enter on your keyboard.
   b. Or, select the Find Tool to configure a search. Change the type of record in the Find Tool to Item Records. Select the appropriate title from the results list.

   *Note - staff are not able to access the full item record from here. Instead, selecting a record will populate the hold request.*

4. Modify the settings (activation date, pickup location, notes, etc.) as necessary.

5. Select **Place Hold**. If successful, a green pop-up will appear at the top of the screen that reads, “The hold request has been created.”

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Identifying an Item-Level Hold vs a Bib-Level Hold:

1. Staff can identify an item-level hold in Leap by a **book icon** next to the hold.

   ![Image of Leap interface with book icon](image)

2. Patrons can identify an item-specific hold by navigating to the “Requests” tab in their PAC account and expanding the **Request Details**.
   
   a. Select the more information icon.

   ![Image of Request Details](image)

   b. A title-level hold will display “First available copy” in the Process field.

   c. An item-level hold will display “This item only” in the Process field.
How to Modify Hold Settings when Placing a Hold

Activation:
In Polaris, there is no separate suspend date/activation date; it all falls under the setting Activation. The Activation date can be changed when placing the hold or from the hold’s settings in the patron’s record. If a hold needs to be suspended, the Activation date needs to be set to a point in the future where the patron will be ready for the hold. If a patron wants to change a suspended hold into an active hold, the Activation date needs to be changed to today’s date.

To change the Activation date when placing a hold:

1. Follow the steps to place a hold, but do not select Place Hold to complete the process.

2. Click on the date box under Activation. A calendar view will open.

3. Select the date when the hold should be reactivated.
   a. The hold will not be included on a picklist or sent to the patron until the Activation date. However, the patron will continue to move up the holds queue during this dormant period. If they reach the top of the queue, they will remain there until the Activation date.

4. Select Place Hold to finish the process.
Expiration
A hold request will remain on a patron’s record for one year. If the request is not filled within by the Expiration date listed, the hold will expire. If staff modify the Activation date, the Expiration date will automatically adjust to one full year from the Activation date.

Pickup
When placing a hold, staff or the patron may specify where they would like to pick up the hold. The pickup location will default to the library or branch the staff member is currently logged in at. To change, click on the Pickup drop-down menu and select the desired location.

Notes
Staff are able to include relevant notes when placing a hold for a patron. There are three different fields available for notes: Staff Display Notes, Non-public Notes, and PAC Display Notes. Staff Display Notes and Non-public Notes are only viewable by staff. PAC Display Notes are viewable by patrons. Notes can be added to a hold request when placing a hold or in the hold request record.

- **Staff Display Notes**: appear as a pop-up to staff when the hold is filled at the pickup branch.
- **Non-public Notes**: appear in the hold request record.
- **PAC Display Notes**: appear in the Request section of a patron’s PAC account.
To add a note when placing a hold:

1. Follow the steps to place a hold, but do not select Place Hold to complete the process.

2. Scroll down to the section labelled, “Notes.” Click to expand if not already expanded.

3. Type the note(s) in the appropriate field(s).

4. Select **Place Hold** to finish the process.

**Unlock**

Selecting Unlock will unlock the bib record information fields in the body of the hold request to edit. If you unlock a record and change any information, the link between the hold and the bib record is broken and the hold will likely become unsupplied. This option is used for out-of-system interlibrary loan requests, where the bib information is not currently in the CCS database.

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