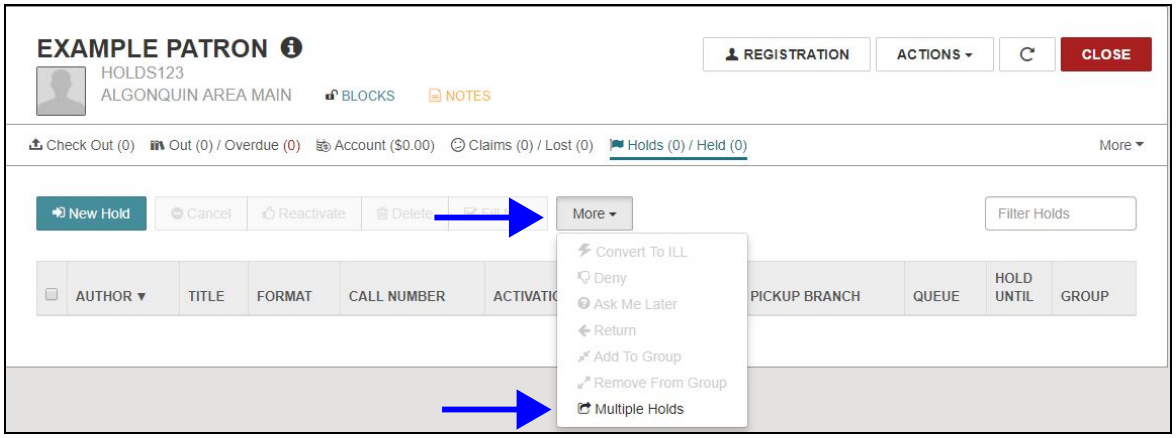
Polaris Holds:
Multiple Holds & Grouping Holds

This guide is an introduction to the following topics:

- Using the Multiple Holds Feature
  - Placing multiple holds on different titles
  - Placing multiple holds on the same title
- Grouping holds
  - Creating a hold group
  - Removing a hold group/a single title from a hold group
  - Adding a title to an existing hold group

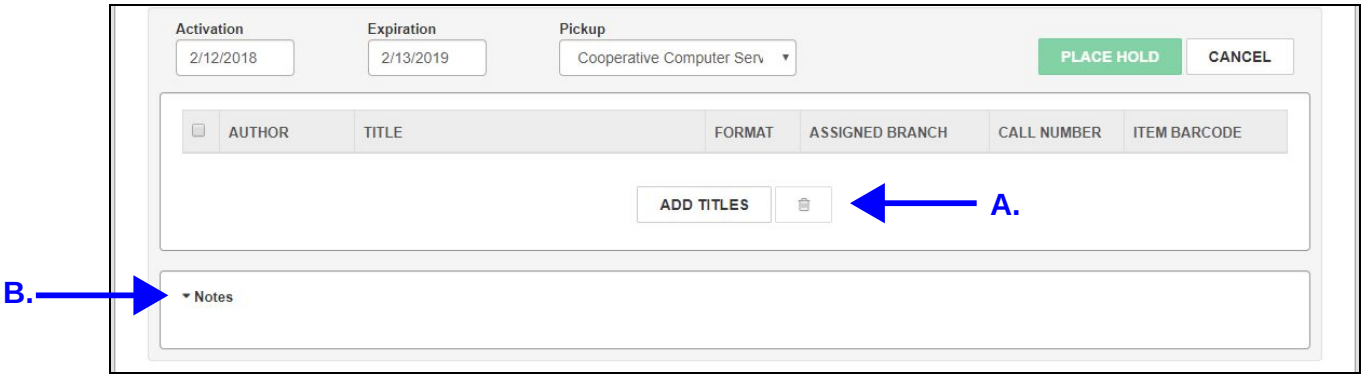
Multiple Holds: placing multiple holds on different titles

1. Open the **Holds/Held tab** in a patron's record.
2. Use the **More** drop-down menu and select **Multiple Holds**.
3. Select **Add Titles**.
4. The **Find Tool** will open. Perform the search.
5. Select a title to add to the multiple holds list.
6. Continue this process until all titles are added.
7. Select **Place Hold** to place a hold on all listed titles.



A. To remove a title from the list, select the title and select the **trash can icon**.

B. If you wish you add a note to the holds, expand the **Notes section** and add the note <u>before</u> selecting Place Hold. The note(s) will be added to every hold.



Multiple Holds: placing multiple holds on the same title

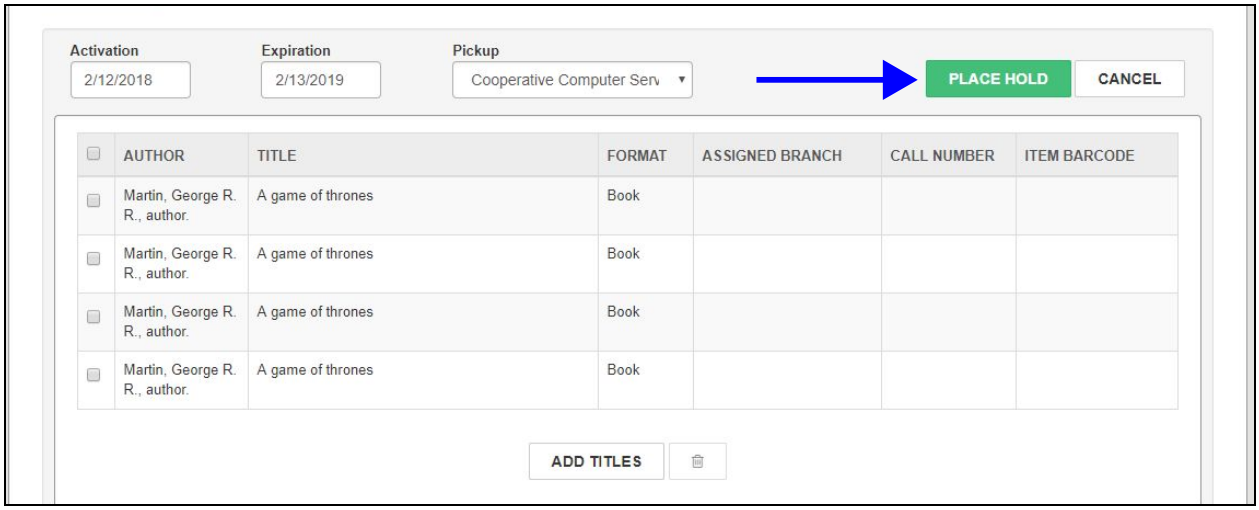
To place multiple holds on the same title for one patron account, you may use the same method discussed above. However, there may be other methods that may help streamline the process, one of which is the **Cut-and-Paste method**. The directions below detail the method using a bibliographic control number, but you may use whichever qualifier you prefer.

1. Open the main **Find Tool** and locate the bibliographic record.
2. **Highlight** the control number and hit **CTRL** + **C** to copy (or right-click on your mouse and select "Copy").

3. Open the patron's record. If the record is open in the background, use the Workform Tracker to toggle back to the patron.
4. Open the **Holds/Held tab**, use the **More** drop-down menu, and select **Multiple Holds**.

5. Select **Find Title**. Make sure the Find Tool is searching for Bibliographic Records.
    a. Depending on your settings, you may need to change the Qualifier to Control Number.
    b. If you will be placing multiple holds in this manner, you may opt to save your search setup by selecting the star at the end of the search bard. This will preserve your setup so you do not have to select the appropriate qualifier each time you open the Find Tool <u>from a patron's Holds/Held tab</u>.

6. Paste the bibliographic control number into the search bar using **CTRL + V** (or right-click on your mouse and select "Paste"). Hit **Enter** on your keyboard once to locate the item in the Find Tool. Hit **Enter** again to add the title to the holds list.
7. Continue pasting and adding until the correct number of holds have been added.
8. Select **Place Hold**. Since all the holds are on the same record, a duplicate hold message will appear. Click through to continue until all the holds have been placed.

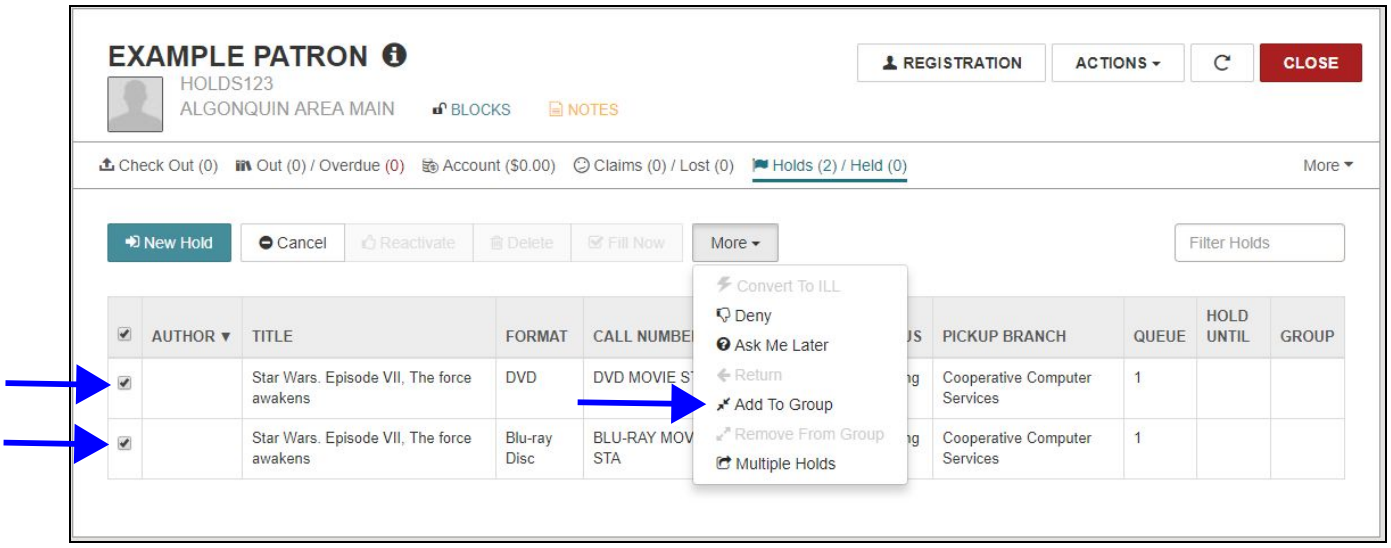


If you wish you add a note to the holds, expand the **Notes section** and add the note <u>before</u> selecting Place Hold. The note(s) will be added to every hold.

Grouping Holds: creating a hold group

Grouping holds allows staff to group multiple holds together if just one of those holds is needed to satisfy a request - for example, if a patron wants a movie but does not matter if they receive a DVD copy or a Blu-Ray copy. Once the hold is filled, the other requests in the group are automatically deleted.

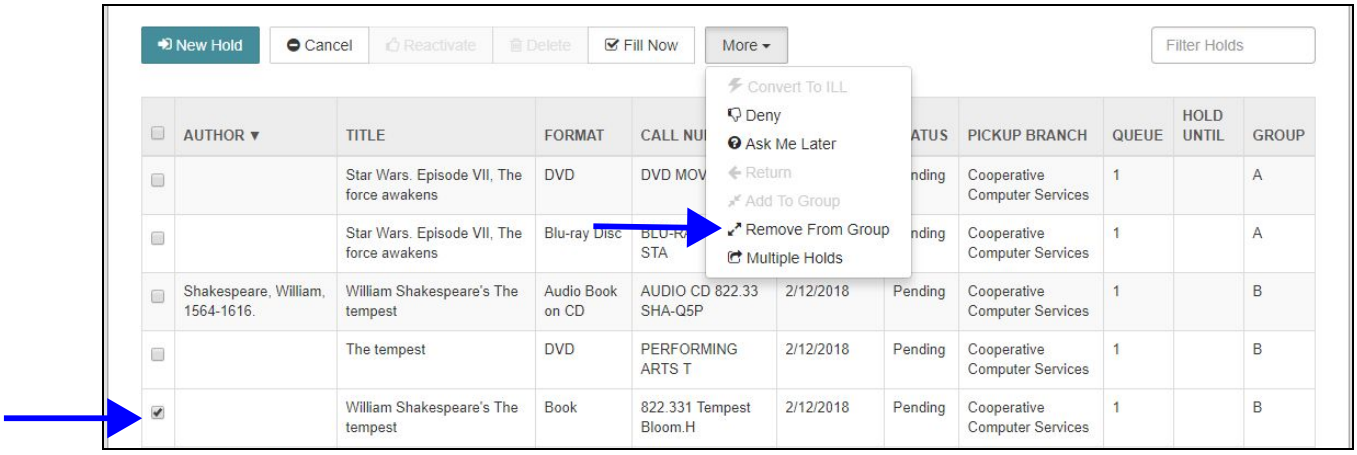
1. Place the holds as normal for the patron.
2. Open the **Holds/Held tab** in a patron's record.
3. Select the holds to be grouped together.
4. Use the **More** drop-down menu and select **Add to group**.



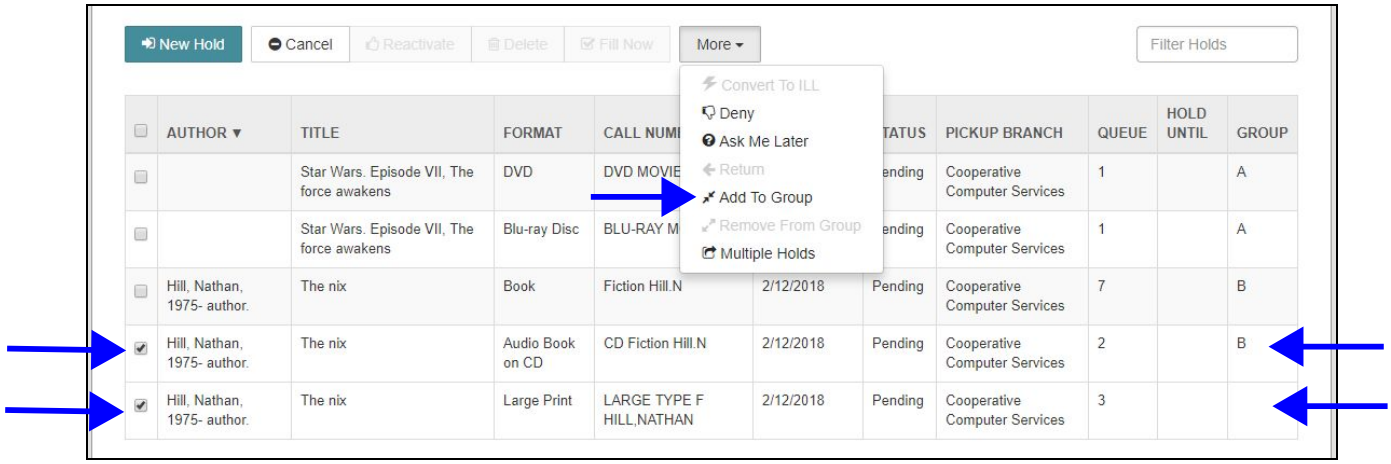
The holds are now grouped together and a letter is assigned to identify which group the requests belong to. As soon as an eligible item is trapped for the patron, the other holds in the group disappear. A patron may have as many hold groups on their account as needed.

Grouping Holds: removing a title or a group

1. Select a title from the grouping.
2. Use the **More** drop-down menu and select **Remove from group**



To remove multiple titles from a group, select the appropriate titles all at once and then select Remove from group. To remove a group entirely, select all the titles from that group and select Remove from group.

Grouping Holds: adding titles to an existing hold group

1. Place the hold for the patron as normal.
2. Open the patron's **Holds/Held tab**.
3. Select the title not assigned to a group.
4. Select one title assigned to the desired group.
5. Use the **More** drop-down menu and select **Add to group**.