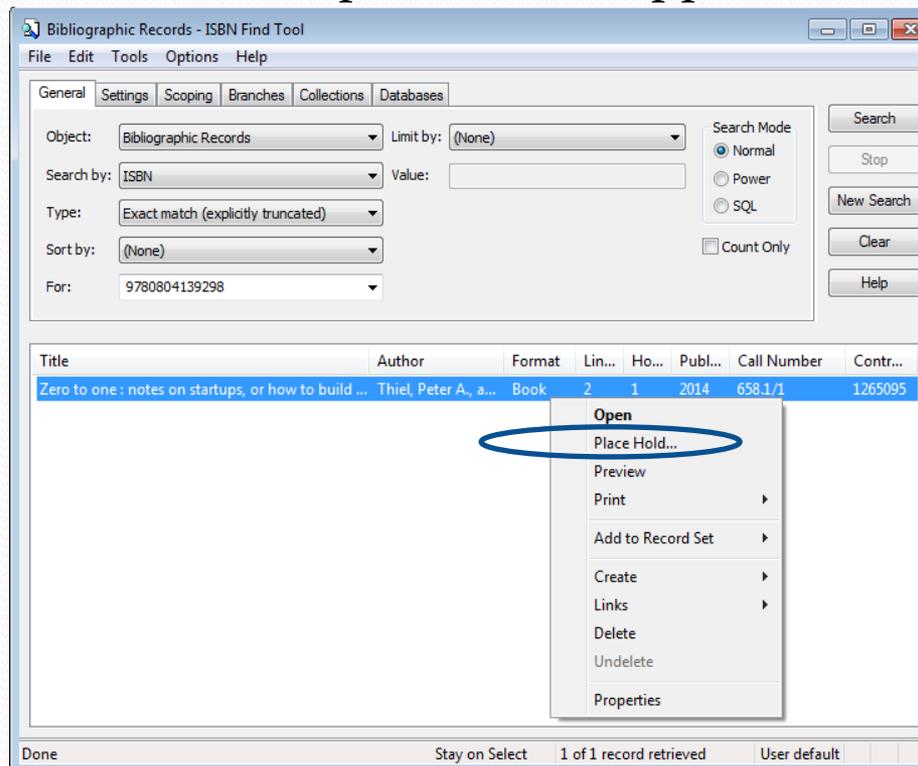


Hold & Hold Requests



Placing Hold Requests

- Your patrons can place holds online, or you can place a hold for them.
- Find what your patron wants using a Bibliographic Record Find Tool (searching by title, author, keyword or ISBN) and right click on the record.
- Chose Place Hold from the drop down that appears.



Placing Hold Requests

- Polaris creates a Hold Request workflow.
- Scan your Patron's barcode number into the workform and click on save.



The "Pickup" branch in the new workform defaults to the library placing the hold. To choose another pickup location, use the drop down list.

The hold becomes "active" immediately, but you can choose a date in the future if your patron wants the item at a later date.

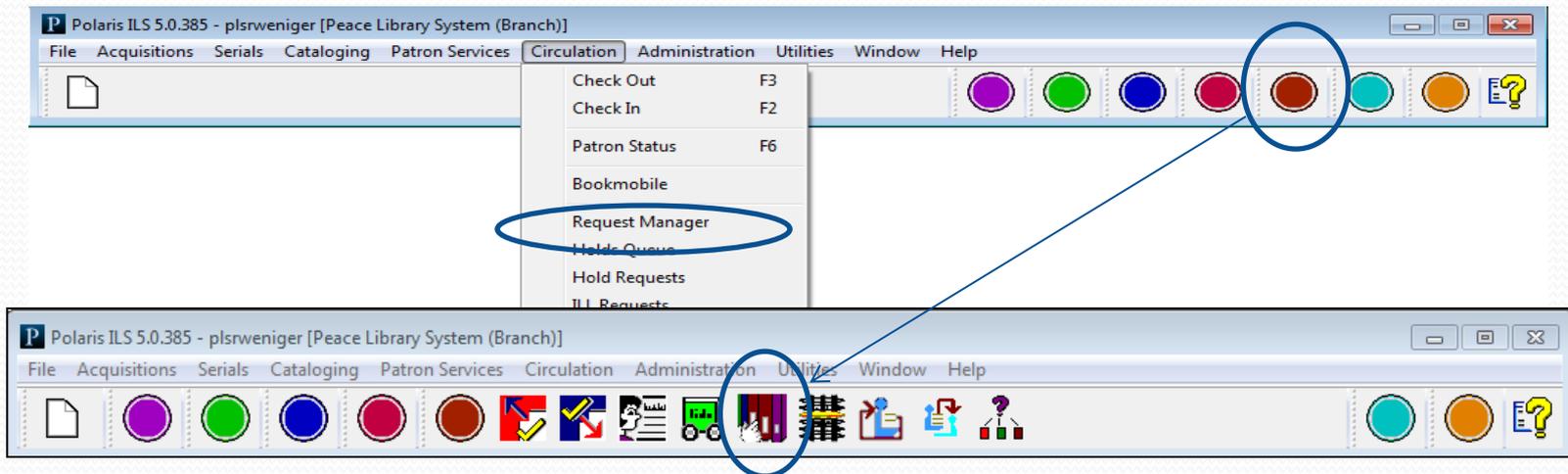
The screenshot shows the Polaris 'Hold Request - New Request 1 - General' window. The interface includes a menu bar (File, Edit, View, Links, Tools, Help) and a toolbar with various icons. The main form is divided into several sections:

- Request:** Includes fields for Status, Request date, and Origin. A dropdown menu for 'Pickup' is set to 'Peace Library System (Branch) (APRPLS)'. There are also 'Activation' and 'Expiration' date pickers.
- Patron:** Includes a 'Barcode' field with a 'Find' button, Name, Registered at, Patron code, and Notification option fields.
- Details:** Includes Title, Author, ISBN, Constituent title, Constituent author, Publisher, Date, Edition, LCCN, Item barcode, Call number, Volume, Format (set to 'Book'), Issue, ISSN, Copy, and Series fields.

A red vertical bar on the left side of the window is labeled 'Hold Request'. A blue circle highlights the 'Barcode' field in the Patron section. Blue arrows point from the text on the left to the 'Pickup' dropdown, the 'Barcode' field, and the 'Activation' date picker.

Filling Hold Requests

- Hold requests are processed across all TRAC libraries with the Polaris Holds Request Manager.
- Login to Polaris.
- Click On “Circulation” and then on “Request Manager”
- OR, click on the dark red circulation orb and then on the “Request Manager” icon.



Request Manager - Hold Requests

Request Manager

Request Manager - Hold Requests

File View Tools Help

Branch name: By: Status:

Requests

Collection	Shelf ...	Call Number	Author	Title	Format	Patron Name	Pickup B...	Barcode	Pending Date
BAB	Block Co...	AUDIO BL...	Richardson...	The art of extre...	Audio Books	Swift, Kyle	ASLM	30100002715102	15/03/2016
BAB	Block Co...	AUDIO BL...	Rowling, J. K.	Harry Potter and...	Audio Books	GEMMILL, V...	AFV	30100002717918	15/03/2016
BAB	Block Co...	AUDIO BL...	Rowling, J. K.	Harry Potter and...	Audio Books	GEMMILL, V...	AFV	30100002717793	15/03/2016
F	Main St...	F ANT	Anthony, P...	On a pale horse	Book	Edmonton Pu...	AGP	30100000282873	14/03/2016
F	Block Co...	F BEC	Bechtel, Gr...	Boundary proble...	Book	Robillard, Ve...	AMO	30100006098612	15/03/2016
F	Main St...	F PYM c.1	Pym, Barbara.	The sweet dove ...	Book	Calgary Publi...	AGP	30100000181687	15/03/2016
F	Main St...	F STE c.1	Stewart, F...	Six weeks.	Book	Burnup, Jack	ABM	30100000186371	15/03/2016
F	Main St...	F STE c.1	Stewart, F...	Star child : a novel	Book	Burnup, Jack	ABM	301000002221798	15/03/2016
F	Main St...	F TRE c.1	Trevanian.	The Eiger sanction	Book	Burnup, Jack	ABM	30100000187478	15/03/2016
NF	Main St...	940.5449 MYL	Myles, Bruc...	Night witches, t...	Book	Edmonton Pu...	AGP	30100000048597	15/03/2016

Held items to transfer:

Collection	Shelf ...	Call Num...	Author	Title	Format	Patron Na...	New Pi...	Barcode	Held Date

For Help, press F1

Number: 10 Bindings: Mar 15 2016 4:27AM RTF: Mar 15 2016 5:54AM NUM

Request Manager - Hold Requests

The screenshot shows the 'Request Manager - Hold Requests' application window. The 'Branch name' is set to 'Peace Library System (Branch) (APRPL5)'. The 'By' field is 'Item' and the 'Status' is 'Pending'. A table of requests is displayed with columns for Collection, Shelf, Call Number, Author, Title, Format, Patron Name, Pickup B..., Barcode, and PENDING Date. A zoomed-in view of a request shows the Patron Name 'Swift, Kyle' and Pickup B... 'ASLM'.

Collection	Shelf	Call Number	Author	Title	Format	Patron Name	Pickup B...	Barcode	PENDING Date
BAB	Block Co...	AUDIO B...	Richardson...	The art of extre...	Audio Books	Swift, Kyle	ASLM	30100002715102	15/03/2016
BAB	Block Co...	AUDIO B...	Rowling, J. K.	Harry Potter and...	Audio Books	GEMMILL, V...	AFV	30100002717918	15/03/2016
BAB	Block Co...	AUDIO B...	Rowling, J. K.	Harry Potter and...	Audio Books	GEMMILL, V...	AFV	30100002717793	15/03/2016
F	Main St...	F ANT	Anthony, P...	On a pale horse	Book	Edmonton Pu...	AGP	30100000282873	14/03/2016
F	Block Co...	F BEC	Bechtel, P...	Boundary proble...	Book	Robillard, Ve...	AMO	30100000509812	15/03/2016
F	Main St...	F PIM c.1	Pym, Barbara.	The sweet dove ...	Book	Calgary Publi...	AGP	30100000181687	15/03/2016
F	Main St...	F STE c.1	Stewart, F...	Six weeks.	Book	Burnup, Jack	ABM	30100000...	15/03/2016
F	Main St...	F STE c.1	Stewart, F...	Star child : a novel	Book	Burnup, Jack	ABM	30100000...	15/03/2016
F	Main St...	F TRE c.1	Trevarian, ...	The Eger sanction	Book	Burnup, Jack	ABM	30100000...	15/03/2016
NF	Main St...	940.5449 MYL	Myles, Bruc...	Night witches, L...	Book	Edmonton Pu...	AGP	30100000...	15/03/2016

Your library should have a copy of the colorful chart called “TRAC mail codes” to help you with sending items. Please call us for a copy if you need one!
780-538-4656 / 1-800-422-6875

Patron Name	Pickup B...
Swift, Kyle	ASLM
GEMMILL, V...	AFV
GEMMILL, V...	AFV
Edmonton Pu...	AGP
Robillard, Ve...	AMO
Calgary Publi...	AGP
Burnup, Jack	ABM
Burnup, Jack	ABM
Burnup, Jack	ABM
Edmonton Pu...	AGP

KEY:	Yellowhead System	Northern Lights System	Peace Library System
	G Bear's Cove	M Hill	S System Two Res
AABEM	S AB Book Public	AFL M Flatbush	APRPL G Peace Library Syst
AAF	S Alder Flats Public	AFV G Fairview L	APV S Peace Valley Theatrical
AAIM	S Airdrie Public	AGC G Grande Cache	APAD S Padway
AAM	S Airdrie Municipal Library	AGCM G Cold Lake (also ACLM)	APEP S Peace Valley Public Library
AAC	S Airdrie PL	AGI S Gibbons	AREE S Red Deer
AATH	S Athabasca - Alice Donohue	AGM S Glendon	ARLM M Rainbow Lake
AAVA	S Acadia Valley	AGP G Grande Prairie	AERM S Rockyford
AB	S Banff	AGRAS S Grassland S	APDC S Rockstar
ABAR	S Beaverlodge	AGVM G Grimshaw	ARYM S Rycroft
ABARR	G Barrhead PL	AH G Hinton	ARLM S Rensay
ABC	M Browvale L	ABCM S Hines Creek	ARV S Rich Valley
ABCB	M Bear Point L	AHL G High Level	ARY S McPherson L - Pelly
ABCBRC	S Blood River - Bill Dand	ABML G Hinton	ASANS S Saanichton
ABEAM	S Bib de Beasmont	AHOM S Holden	ASB S Suba Beach
ABEM	S Boisclair	ANPM G High Prairie	ASG G Spruce Grove
ABM	G Bowryville	ABRM G High River	ASQY G Yellowhead HQ
ABGA	S Bow Island	ABIM S Hinton	ASH G Stony Hill L
ABON	S Bossasa	ANYM S Hycik	ASIC S Bib de St. Isidore
ABDY	G Boyle	AIP S Village of Inaifree	ASL G Smoky Lake
ABFC	S Blue Ridge	AIRC S Irma	ASLM G ...
ABFM	S Buxton	AI S Irricana	ASRL G Strathmore
ABRUM	S Metro Kyla C - Bradefield	AJ S Jasper	ASMLS G Marigold HQ
ABVM	S Berwyn	AJA S Jarvis L	ASP G Stony Plain
ACALM	S Calmar	AKC M Keg River	ASRM G Spirit River
ACARM	G Camrose	AKC S Kegonsa	ASRSL S Stovena
ACARM	S Carbone	AK S Kitscoty Public Library	ASSCL M Smith
ACARSE	S Carleton Place	AKM M Kiasso	ASSM S Sezsmith
ACC	S Berry Cr - Coopford	ALAC S Pigeon Lake	ASTM S Staggard
ACEEM	S Carol	ALE G Leduc	ASTR G St. Paul
ACHES	G Chertoware	ALGC S La Glace	ATAN M Tangent
ACHM	S Chocoma Municipal Library	ALLE G ...	ATHI S Alice Malyak - Two Hills
ACLM	G ...	ALM S Leduc	ATHM G Three Hills
ACLMSC	S ...	ALND S Longview	ATROM S Thorold
ACLIPL	M Calling Lake	ALPE S Edmonton Garrison	ATM S Thorby
ACOM	G ...	AMA S Mayarhorpe	ATO S Tomahawk
ACONM	G Coonort	AMAL S Malburg	ATOF G Tofoad
ACRM	S Crossfield Municipal Library	AMAM G Manning	ATRM S Tumbler
AD	G Devon	AMAN S Maserick	AVCM S Valkalla
ADAR	S Danzell	AMAR S Marrayne	AVE G Vegreville L
ADC	S DeBolt	AMC S Millarville	AVER G Vermilion L
ADIX	S Dixieville	AME G 4 Wing (Off-Caldwell)	AVL S Vero
ADM	S Delia	AMT S Millet	AVK S Viking
ADRM	G Drumheller	AMLM G Mcleanna	AVVM G Valleyview
ADUF	G Duffield	AMML S Maudre	AVJ G Vetsville
ADV	G Devon Valley	AMO G Montrose	AWA S Waburg
AEAM	S Eaglesham	AMOM S Morris	AWAIG G Wainright
AELC	S Elsworth	AMYR S Myraam	AWAS S ...
AED	G Edson	AN S Newbards	AWD S Worsley
AED	S Edgerton	ANE S Newbrook	AWEM S Wrasley
AELK	G Elk Point	ANUG S Nixon	AWES G Westlock
AEM	S Empress	ANM S Neampa	AVH G Whitcomb
AENT	S Ennetha	ANS S New Sarepta	AVI S Whitford
AEPNL	G Northern Lights HQ	AO G Osoyoos L	AVLD S Whitford
AEV	G Ersvaerburg	AOM S Okotoks	AVM S Wabean
REXC	S Big Horn	ADYM G Opa	AWO S Wabean
AFA	S Fort Assaboine L	APL S Pinsonood	AWR S ...
AFAW	S M. Alice Evans - Forest	APPP M Paddle Prairie Pab	AWVA M Wabasca
AFCM	G Fox Creek L	APRM G Peace River	ATM G Yocumton
AFD	G Bib Dentinger		

All TRAC member libraries (from four partner systems: Peace Library System, Northern Lights Library System, Marigold Library System and Yellowhead Library System) share the Polaris database, so the Patrons you are serving through the request manager are from all over Alberta!

Request Manager - Hold Requests

Request Manager - Hold Requests

Branch name: Peace Library System (Branch) (APRPLS) By: Item Status: Pending

Collection	Shelf	Call Number	Author	Title	Format	Patron Name	Pickup B...	Barcode	Pending Date
BAB	Block Co...	AUDIO BL...	Richardson...	The art of extre...	Audio Books	Swift, Kyle	ASLM	30100002715102	15/03/2016
BAB	Block Co...	AUDIO BL...	Rowling, J. K.	Harry Potter and...	Audio Books	GEMMILL, V...	AFV	30100002717918	15/03/2016
BAB	Block Co...	AUDIO BL...	Rowling, J. K.	Harry Potter and...	Audio Books	GEMMILL, V...	AFV	30100002717993	15/03/2016
F	Main St...	F ANT	Anthony, P...	On a pale horse	Book	Edmonton Pu...	AGP	30100000282873	14/03/2016
F	Block Co...	F BEC	Bechtel, Gr...	Boundary proble...	Book	Robillard, Ve...	AMO	30100000598612	15/03/2016
F	Main St...	F PYM c.1	Pym, Barbara.	The sweet dove ...	Book	Calgary Publi...	AGP	30100000181687	15/03/2016
F	Main St...	F STE c.1	Stewart, F...	Six weeks.	Book	Burnup, Jack	ABM	30100000	15/03/2016
F	Main St...	F STE c.1	Stewart, F...	Star child : a novel	Book	Burnup, Jack	ABM	30100000	
F	Main St...	F TRE c.1	Trevarian.	The Egger sanction	Book	Burnup, Jack	ABM	30100000	
NF	Main St...	940.5449 MYL	Myles, Bruc...	Night witches, L...	Book	Edmonton Pu...	AGP	30100000	

Patron Name	Pickup B...
Swift, Kyle	ASLM
GEMMILL, V...	AFV
GEMMILL, V...	AFV
Edmonton Pu...	AGP
Robillard, Ve...	AMO
Calgary Publi...	AGP
Burnup, Jack	ABM
Burnup, Jack	ABM
Burnup, Jack	ABM
Edmonton Pu...	AGP

Sometimes a “Patron Name” is a library! Items for “libraries” are forwarded to Grande Prairie Public Library (AGP). These are actually requests made by patrons outside TRAC through TAL Online with provincial software called VDX. The requests are added to Polaris by AGP for PLS member libraries. Some larger PLS member libraries use VDX on their own and do not forward these items to AGP.

Request Manager - Hold Requests

Request Manager - Hold Requests

File View Tools Help

Branch name: Peace Library System (Branch) (APRPLS) By: Item Status: Pending

Requests

Collection	Shelf ...	Call Number	Author	Title	Format	Patron Name	Pickup B...	Barcode	Pending Date
BAB	Block Co...	AUDIO BL...	Richardson...	The art of extre...	Audio Books	Swift, Kyle	ASLM	30100002715102	15/03/2016
BAB	Block Co...	AUDIO BL...	Rowling, J. K.	Harry Potter and...	Audio Books	GEMMILL, V...	AFV	30100002717918	15/03/2016
BAB	Block Co...	AUDIO BL...	Rowling, J. K.	Harry Potter and...	Audio Books	GEMMILL, V...	AFV	30100002717793	15/03/2016
F	Main St	F ANT	Anthony, P.	On a pale horse	Book	Edmonton Pu	AGP	30100000282873	14/03/2016

The first six columns, and the second last column, tell you which items are requested from your collection. These columns are the most important to print for gathering your items from the shelves. Holding your cursor over the edge of the column headings and altering the column width to expose more valuable text and to conceal text not needed will produce a compact and simple report....

Request Manager - Hold Requests

Request Manager - Hold Requests

File View Tools Help

Branch name: Peace Library System (Branch) (APRPLS) By: Item Status: Pending

Requests

Collection	Shelf Location	Call Number	Author	Title	Barcode
BAB	Block Collections	AUDIO BLOCK 158.1 RIC	Richardson, Cheryl	The art of extreme self-care	30100002715102
BAB	Block Collections	AUDIO BLOCK J ROW	Rowling, J. K.	Harry Potter and the chamber of secrets	30100002717918
BAB	Block Collections	AUDIO BLOCK J ROW	Rowling, J. K.	Harry Potter and the prisoner of Azkaban	30100002717793
F	Main Stacks	F ANT	Anthony, Piers	On a pale horse	30100000282873
F	Block Collections	F BEC	Bechtel, Greg, 1971-, author.	Boundary problems : stories	30100006098612
F	Main Stacks	F PYM c.1	Pym, Barbara.	The sweet dove died	30100000181687
F	Main Stacks	F STE c.1	Stewart, Fred Mustard, 1932-	Six weeks.	30100000186371
F	Main Stacks	F STE c.1	Stewart, Fred Mustard, 1932-	Star child : a novel	30100000221798
F	Main Stacks	F TRE c.1	Trevarian.	The Eiger sanction	30100000187478
NF	Main Stacks	940.5449 MYL	Myles, Bruce, 1942-	Night witches, the untold story of Soviet...	30100000048597

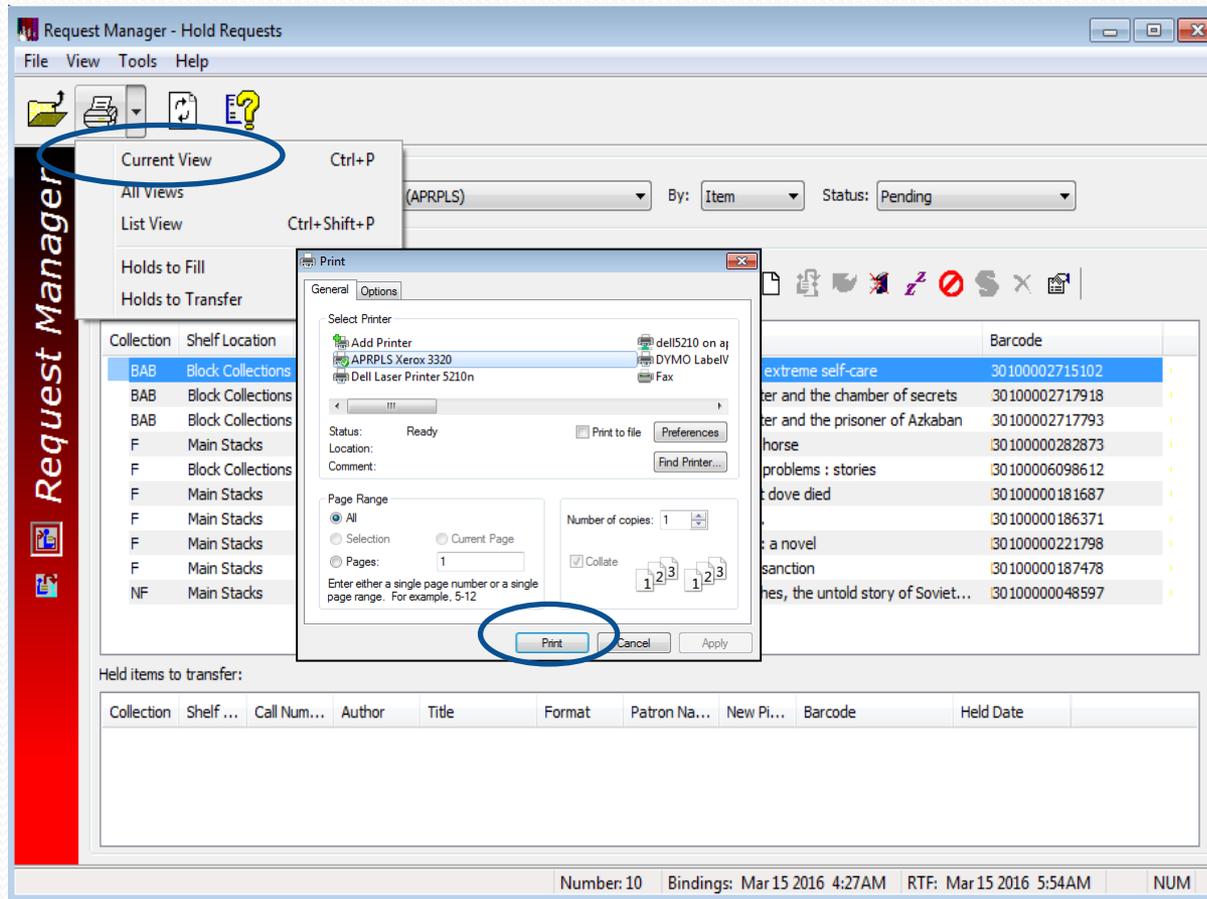
Held items to transfer:

Collection	Shelf ...	Call Num...	Author	Title	Format	Patron Na...	New Pi...	Barcode	Held Date
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For Help, press F1 Number: 10 Bindings: Mar 15 2016 4:27AM RTF: Mar 15 2016 5:54AM NUM

Here is the same list with 4 columns concealed to allow for more text (call number and title and shelf location) needed to find these books and get them ready for patrons at home and across the province!....

Request Manager - Hold Requests



Click on the printer icon and choose current view, or list view, then click on print. Confirm that your printer is set for “landscape orientation” in the printer preferences.

Request Manager - Hold Requests

Request Manager - Hold Requests

File View Tools Help

Branch name: Peace Library System (Branch) (APRPLS) By: Item Status: Pending

Requests

Collection	Shelf Location	Call Number	Author	Title	Barcode
BAB	Block Collections	AUDIO BLOCK 158.1 RIC	Richardson, Cheryl	The art of extreme self-care	30100002715102
BAB	Block Collections	AUDIO BLOCK J ROW	Rowling, J. K.	Harry Potter and the chamber of secrets	30100002717918
BAB	Block Collections	AUDIO BLOCK J ROW	Rowling, J. K.	Harry Potter and the prisoner of Azkaban	30100002717793
F	Main Stacks	F ANT	Anthony, Piers	On a pale horse	30100000282873
F	Block Collections	F BEC	Bechtel, Greg, 1971-, author.	Boundary problems : stories	30100006098612
F	Main Stacks	F PYM c.1	Pym, Barbara.	The sweet dove died	30100000181687
F	Main Stacks	F STE c.1	Stewart, Fred Mustard, 1932-	Six weeks.	30100000186371
F	Main Stacks	F STE c.1	Stewart, Fred Mustard, 1932-	Star child : a novel	30100000221798
F	Main Stacks	F TRE c.1	Trevanian.	The Eiger sanction	30100000187478
NF	Main Stacks	940.5449 MYL	Myles, Bruce, 1942-	Night witches, the untold story of Soviet...	30100000048597

Held items to transfer:

Collection	Shelf ...	Call Num...	Author	Title	Format	Patron Na...	New Pi...	Barcode	Held Date
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For Help, press F1 Number: 10 Bindings: Mar 15 2016 4:27AM RTF: Mar 15 2016 5:54AM NUM ...

Gather your items together. Open a “Check In” window, and check in each item. Send the items to the libraries where patrons are waiting. Follow the guidelines on “Shipping Interlibrary Loans (ILLs)” on the PLS website: <http://www.peacelibrarysystem.ab.ca/ill-procedures>

Request Manager - Hold Requests

Request Manager - Hold Requests

File View Tools Help

Branch name: Peace Library System (Branch) (APRPLS) By: Item Status: Pending

Requests

Collection	Shelf Location	Call Number	Author	Title	Barcode
BAB	Block Collections	AUDIO BLOCK 158.1 RIC	Richardson, Cheryl	The art of extreme self-care	30100002715102
BAB	Block Collections	AUDIO BLOCK J ROW	Rowling, J. K.	Harry Potter and the chamber of secrets	30100002717918
BAB	Block Collections	AUDIO BLOCK J ROW	Rowling, J. K.	Harry Potter and the prisoner of Azkaban	30100002717793
F	Main Stacks	F ANT	Anthony, Piers	On a pale horse	30100000282873
F	Block Collections	F BEC	Bechtel, Greg, 1971-, author.	Boundary problems : stories	30100006098612
F	Main Stacks	F PYM c.1	Pym, Barbara.	The sweet dove died	30100000181687
F	Main Stacks	F STE c.1	Stewart, Fred Mustard, 1932-	Six weeks.	30100000186371
F	Main Stacks	F STE c.1	Stewart, Fred Mustard, 1932-	Star child : a novel	30100000221798
F	Main Stacks	F TRE c.1	Trevanian.	The Eiger sanction	30100000187478
NF	Main Stacks	940.5449 MYL	Myles, Bruce, 1942-	Night witches, the untold story of Soviet...	30100000048597

Held items to transfer:

Collection	Shelf ...	Call Num...	Author	Title	Format	Patron Na...	New Pi...	Barcode	Held Date
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For Help, press F1 Number: 10 Bindings: Mar 15 2016 4:27AM RTF: Mar 15 2016 5:54AM NUM

- If you are unable to find an item, please click on the “ask me later” icon,  so the request can be filled by another library. If it stays on the list, you have the only copy! Please call PLS.
- If you are not able to find the item after a few days, please change the circulation status of your item record to “missing”.
- Please call PLS immediately if you accidentally cancel a hold so the hold can be reactivated.

Polaris Request Manager

Questions?

Call PLS and
talk to a
member of the
consulting
team!

780-538-4656
1-800-422-6875

Request Manager - Hold Requests

File View Tools Help

Branch name: By: Status:

Requests

Collection	Shelf Location	Call Number	Author	Title	Barcode
BAB	Block Collections	AUDIO BLOCK 158.1 RIC	Richardson, Cheryl	The art of extreme self-care	30100002715102
BAB	Block Collections	AUDIO BLOCK J ROW	Rowling, J. K.	Harry Potter and the chamber of secrets	30100002717918
BAB	Block Collections	AUDIO BLOCK J ROW	Rowling, J. K.	Harry Potter and the prisoner of Azkaban	30100002717793
F	Main Stacks	F ANT	Anthony, Piers	On a pale horse	30100000282873
F	Block Collections	F BEC	Bechtel, Greg, 1971-, author.	Boundary problems : stories	30100006098612
F	Main Stacks	F PYM c. 1	Pym, Barbara.	The sweet dove died	30100000181687
F	Main Stacks	F STE c. 1	Stewart, Fred Mustard, 1932-	Six weeks.	30100000186371
F	Main Stacks	F STE c. 1	Stewart, Fred Mustard, 1932-	Star child : a novel	30100000221798
F	Main Stacks	F TRE c. 1	Trevanian.	The Eiger sanction	30100000187478
NF	Main Stacks	940.5449 MYL	Myles, Bruce, 1942-	Night witches, the untold story of Soviet...	3010000048597

Held items to transfer:

Collection	Shelf ...	Call Num...	Author	Title	Format	Patron Na...	New Pi...	Barcode	Held Date

For Help, press F1

Number: 10 Bindings: Mar 15 2016 4:27AM RTF: Mar 15 2016 5:54AM NUM

Request Manager