

Staff Training Program: Placing Item Level Holds in Polaris

Documentation of the Mastery: Sometimes librarians are asked to place a hold on a specific item in the catalog. Upon completion of this mastery, you will be able to place an Item level hold in Polaris, and will understand the difference between an Item Hold and a regular (Bib level) Hold.

Librarians sometimes are asked to place a hold on a specific item in Polaris, rather than “any item with that title/ISBN”. Reasons:

- Sometimes a Bib record includes multiple Volumes, and patron wants a specific Volume.
 - Patron wants a specific copy because they know a copy from a specific library has pages missing, smells, or is otherwise faulty; or
 - our copy is in and they want to come right away and get it. Item holds are the best way to put a copy on the holds shelf for a patron, as the item in hand will fill the hold, while someone checking in another copy elsewhere will not.
1. Holds placed from the Public Catalog are generally Bib level, that is, “whichever item is available first” will fill the hold. To place an Item level hold, you should be using the Staff side of Polaris.
 2. Search for the title in Polaris using Bib record search.
 3. Right click on the title and choose Preview to display all the individual items within that title.
 4. Identify the item you wish to place on hold. Right click on the item and choose “Place a Hold”.
 5. Search for the patron’s information by either typing or scanning in their library card barcode number, or click on Find to search by their name.
 6. Verify the patron’s information and the location where they wish to pick up the item, then click on Save.

Proof of Mastery: In the presence of a Proctor, and using yourself as the patron, successfully place an item level hold on a title that has multiple items within the record. Then pull up the Holds Queue and show them the Item hold.

Current Proctors for this Mastery:

- Meg VanPatten
- Julia Schult
- Nancy Howe

Resources:

This task is estimated to take 15 minutes for someone familiar with Polaris Staff side to master.

They will need:

- access to a computer with Polaris staff access
- Any title that has multiple items within the record
- a proctor to observe their mastery of this skill.
- [may need an “expert” to answer questions]