Polaris® Patron Services Guide

POLARIS
LIBRARY SYSTEMS
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Contents

About This Guide

This guide explains how to use Polaris for patron services and circulation functions, such as patron registration, check-out and check-in, holds processing, patron accounting, course reserves, and outreach services.

To do the tasks in this guide, permissions must be set for your user name and workstation. If you have questions about permissions in Polaris, see your Polaris administrator.

Patron Services Topics

Important:
For information about developments that may have occurred after this information was published, go to **www.polaristown.com**.

Getting Started in Patron Services	Overview of patron services functions; patron records and how to find and display them.
Patron Registration	Creating, modifying, merging, and deleting patron records; patron photos; patron reading histories; posting and managing patron messages; patron associations; deleting and merging records; generating patron mailing labels.
Bulk-Changing Patron Records	Creating record sets to bulk-change multiple patron records.
Circulation Workstations: Receipts, Sounds, Smart Cards	Setting up the workstation for receipt printing, sound alerts for messages and blocks, and smart card use.
Check-Out and Renewal	Check-out blocks and messages; check-out and renewal; circulating on-the-fly uncataloged items; overview of item records.
Working with Blocks (Stops)	Resolving patron and item blocks at circulation; adding and deleting patron blocks.
Check-In	Checking in items; bulk check-in; managing fines at check-in; checking in new shelf-ready items; in-house usage.
Circulating Ephemeral Items	Creating quick-circ (ephemeral) items for circulation; quick-circ check-out and check-in.
Taking an Item Inventory	Inventorying items on the shelf; inventory reports.
Working with Claims	Assigning a claim status to an item when a patron claims she returned the item or never had it; resetting a patron's total claims count; estimating fines on claimed and lost items.

Managing Lost Items	Processing items that are declared lost, and items that have been declared lost but turn up at circulation.
Patron Status and Accounting	Displaying and printing items out for a patron; estimating fines on currently checked out items; notice histories; patron accounting, including assigning, paying, and waiving charges; refunding and crediting payments; credit card processing; making and reconciling deposits; using collection agencies.
Working with Hold Requests	Placing, modifying, and cancelling holds; the holds queue; processing requests-to-fill; filling hold requests at circulation.
Working with Interlibrary Loans	The interlibrary loan process, from creating and exporting an ILL request to receiving an ILL item and returning the ILL item.
Borrow By Mail Circulation	Placing Borrow by Mail requests; processing Borrow by Mail items for shipment.
Outreach Services Processing	Setting up outreach (homebound) patron profiles; suspending and reactivating service; creating title selection lists; processing multiple outreach services patrons; working with reader ratings.
Managing Course Reserves	Setting up course records; placing items on reserve; circulating reserved items, including templates for instructor-owned or temporary course reserve items; notices for instructors.
Patron Services/Circulation Shortcut Keys	List of shortcut keys formatted for convenient printing and clipping.

Related Resources

- *Polaris Basics Guide*

  This guide contains basic Polaris information, including procedures to start Polaris tasks; find, create, and display records; and run reports. In addition, this guide discusses how to use the Polaris documentation, including online Help.

- *Polaris Online Help*

  The Polaris online Help is accessible from the Help menu on the Polaris Shortcut Bar or any Polaris workform, or by pressing **F1** with a Polaris window active.

- *Polaris Patron Services Administration Guide*

  Settings in Polaris Administration control access to functions, the display of data, and the way the data is processed in Polaris Patron Services and Circulation.

- Library Polaris Administrator

  If you have questions about using Polaris, contact your Polaris administrator or trainer at the library for help.

- Polaris Library Systems Web Site

  For updated user and support information, go to **www.polaristown.com**. You can also contact your Site Manager at:
  1-877-857-1978.

Getting Started in Patron Services

At the circulation desk, you use Polaris Patron Services to do activities such as registering patrons and updating patron records, checking in and checking out materials, placing requests, and processing patron fines and fees. This unit gets you started.

This unit covers the following topics:

- "Patron Services Records" on page 5
- "Patron Services on the Shortcut Bar" on page 7
- "Finding Patron Records" on page 9

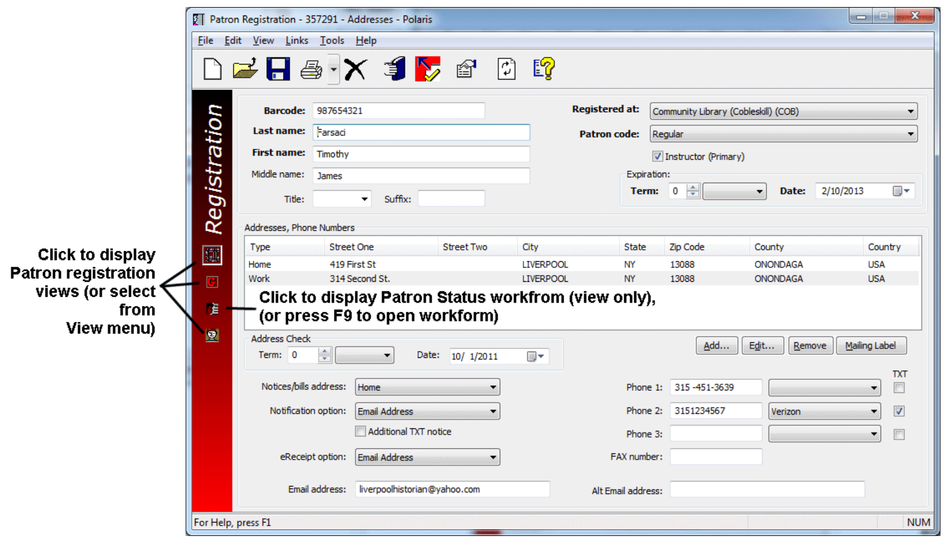
Related Information

- **Customizing patron services** - Your library's Polaris administrator customizes Polaris according to your library's policies. For example, loan periods, overdue fine rates, and hold request policies are set in Polaris Administration. See the *Polaris Patron Services Administration Guide 4.1R2*.
- **Patron accounts and PAC** - Your library may allow patrons to access their own accounts, place holds, renew items, and pay their fines through Polaris® PowerPAC™ or Mobile PAC. For information on Polaris Administration settings that control patron account access in PAC, see "Setting Up Patron Account Access" in the *Polaris Public Access Administration Guide 4.1R2*. The library may also allow access to patron accounts from Polaris® ExpressCheck™ self-check units. See the *Polaris ExpressCheck Administration Guide* for set-up information.

Patron Services Records

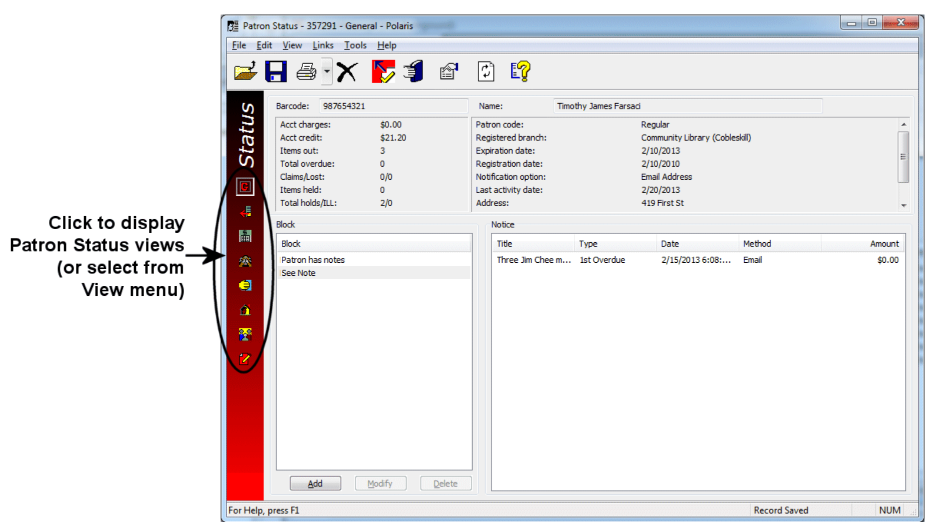
Patron records contain information about the patron and the patron's library activities. Information about circulation and request transactions is stored in patron records, as well as in the bibliographic and item records for the material. Patron information is displayed in two workforms:

- The Patron Registration workform displays patron registration data, including general, address, and notification information. If your system includes patron photo identification, the Patron Registration workform also includes a photo view.



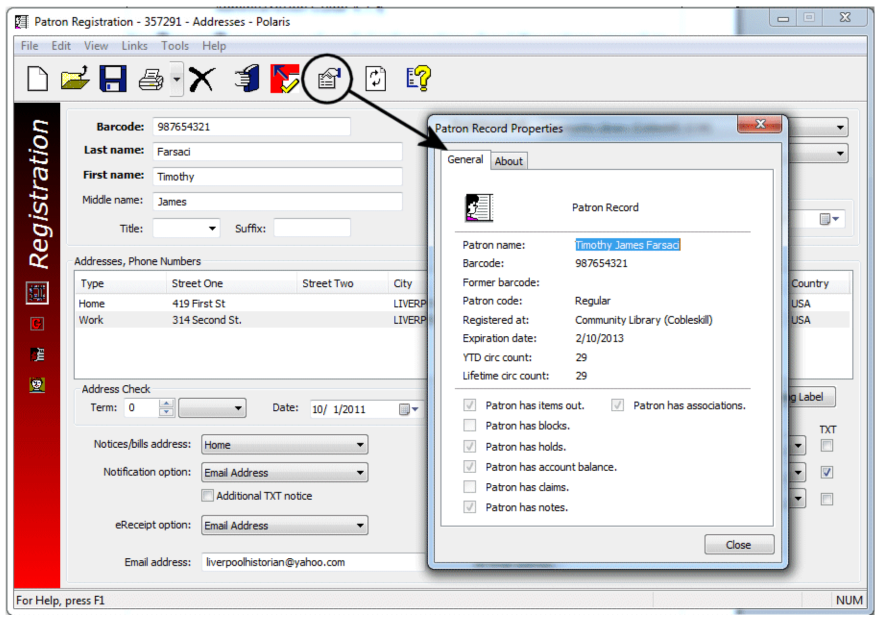
Tip:
Press **F9** to switch between the Patron Registration and Patron Status workforms for a patron record.

- The Patron Status workform displays data that changes, either manually or automatically, as the patron uses library services. It includes information about blocks, notices, checked-out items, monetary transactions, claims, requests, reading history, outreach services profiles, associations, notes, and patron messages.



Note:
Your Polaris administrator can set a preferred opening view for the Patron Status workform. See "Setting Preferred Workform Views" in the *Polaris Administration Guide 4.1R2*.

You can see a summary of useful information about the patron record in the patron properties sheet. Click or press **F8** in the Patron Registration or Patron Status workform to open the properties sheet. (You can also view a patron's property sheet directly from a Find Tool results list, without opening the record. See "Finding Patron Records" on page 9.)



Patron Services on the Shortcut Bar

To get started in patron services, log on to Polaris. See "Start and log on to the Polaris staff client" in the *Polaris Basics Guide 4.1R2*. After you log on, the Polaris Shortcut Bar menu options are available:

- To create a new patron record, select **File, New**. See "Patron Registration" on page 16.

Tip:

Click to expand the Patron Services toolbar. You can click the icons to open the Find Tool and search for existing patron records, record sets, and other records. For example, click to search for an existing patron record.

- To start a patron services task, select **Patron Services**.

  The Patron Services menu offers the following options:

  - **Patron Records** - Opens the Polaris Find Tool to search for a patron record and display it in the Patron Registration workform. See "Finding Patron Records" on page 9.
  - **Record Sets** - Opens the Polaris Find Tool to search for a patron record set and display it in the Record Set workform. Record sets are a convenient way to manage multiple patron records. See "Bulk-Changing Patron Records" on page 72.
  - **Course Reserve Records** - Opens the Polaris Find Tool to search for a course reserve record and display it in the Course Reserve workform. See "Managing Course Reserves" on page 304.
  - **Templates** - Opens a submenu with the option **Course Reserve**. Select this option to open the Polaris Find Tool and search for a course reserve record template. See "Managing Course Reserves" on page 304.
  - **Outreach Services** - Opens the Outreach Services Manager, where you can process multiple patrons who are due for outreach service deliveries. See "Outreach Services Processing" on page 274.

Tip:

Click to expand the Circulation toolbar. You can click the icons to do circulation tasks.

For example, click to open the Check Out workform.

- To start a circulation task, select **Circulation**.

  The following options appear on the Circulation menu:

  - **Check Out** - Opens the Check Out workform to check out items. See "Check-Out and Renewal" on page 89.
  - **Check In** - Opens the Check In workform to check in items. See "Check-In" on page 122.
  - **Patron Status** - Opens the Polaris Find Tool to search for a patron record and display it in the Patron Status workform. See "Finding Patron Records" on page 9.
  - **Bookmobile** - Opens the Bookmobile workform to upload offline transaction files for online processing. You can also view a report that contains errors, warnings, and the number of offline transactions for each uploaded file. See "Managing Offline Circulation" in the *Polaris Patron Services Administration Guide 4.1R2*.

- **Request Manager** - Displays the Request Manager workform for working with all hold requests and interlibrary loan requests. See “Working with Hold Requests” on page 206.
- **Holds Queue** - Opens the Polaris Find Tool to search for a bibliographic or item record and display the hold queue for the title or item in the Holds Queue workform. See “Working with Hold Requests” on page 206.
- **Hold Requests** - Opens the Polaris Find Tool to search for a hold request. See “Working with Hold Requests” on page 206.
- **ILL Requests** - Opens the Polaris Find Tool to search for an interlibrary loan request. See “Working with Interlibrary Loans” on page 245.
- **Options** - Opens the Circulation: Options dialog box. Use this dialog box to set receipt printer options, alert sounds, and smart card reader options. See“Setting Up Receipt Printing from Workforms” on page 79, “Setting Circulation Audio Signals” on page 86, and “Setting the Workstation for Smart Card Use” on page 88.

Related Information

Polaris Shortcut Bar - See “Getting Started in Polaris” in the *Polaris Basics Guide 4.1R2*.

Finding Patron Records

You begin many patron services tasks by finding existing patron records and record sets with the Polaris Find Tool. From the results list in the Find Tool, you can open a record, or you can right-click a line item and use the context menu to work with the record without opening it.

Example:
From a patron record line item in the results list, you can choose to check out an item or place a hold request for the patron, among other options.

For detailed information about using the Find Tool, see "Doing a Basic Search" in the *Polaris Basics Guide 4.1R2*. You can also use the Find Tool to locate bibliographic and item records when you are doing tasks such as creating hold requests. For detailed information about these records and how to find them, see "Cataloging Topics" in the *Polaris Cataloging Guide 4.1R2*.

Patron Record Searching - Tips

You can search for patron records according to any of the access points listed in the **Search by** box on the Find Tool. The following searching tips are arranged by search access points.

Searching by Patron Name

- Searches are not case-sensitive. You can type names in uppercase, lowercase, or both.
- When doing a search by **Name (Last, First Middle)**, you must place a space between the comma and the first name.
- When typing a compound last name, do *not* use any spaces. For example, type **MacDonald** (instead of **Mac Donald**).

The table lists some common ways to search by patron name.

Search by (Search Access Point)	***Type (Type of Truncation)***	***For (Text to Search for)***	***Results***
Last, First Middle	Implicit	**Barry** (without a comma)	All *Barry* surnames and variations beginning with *Barry*, such as *Barryman*
Last, First Middle	Implicit	**Barry,** (with a comma)	All *Barry* and no variations
Last, First Middle	Implicit	**Barry, John**	The extreme right term (John) is truncated. Results could include: • *Barry, John* • *Barry, John Adam* • *Barry, Johnnathan* But not *Barryman, John*
Last, First Middle	Explicit	**Barry, John***	Same results as implicit for **Barry, John**
First Middle Last	Explicit	**John* Barry**	Results could include: • *Barry, John* • *Barry, John Adam* • *Barry, Johnnathan*

You can use **Limit by** options to focus your search. See "More Precise Searches" on page 13.

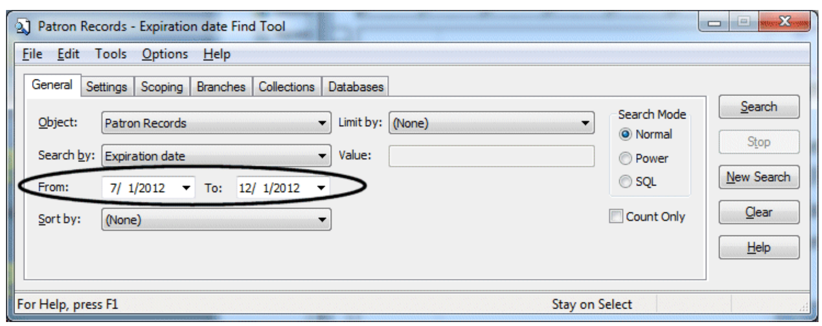
Searching by Barcode

When you search by barcode, you can scan or type the barcode in the **For** box.

If your library system allows you to enter just the significant digits (the last unique portion) of a patron barcode, select **Barcode** in the **Search by** box and **Significant Digits** in the **Type** box. When you select this search type, you can enter just the significant digits. Leading zeroes are added as necessary, and the complete barcode appears in the **For** field. (If you select **Significant Digits** as the search type but enter more than the default number of digits, the search is not likely to yield any results.) If your library system does not use significant digits, the option is not available in the **Type** box. For more information about setting Polaris to use significant digits, see "Significant Digits in Patron Barcodes" in the *Polaris Administration Guide 4.1R2*.

Searching by Date

When you search by date, such as an expiration date or registration date, the Find Tool displays **From** and **To** boxes. You specify a date range by typing in the date boxes, or you can click the down arrows by the date boxes and select the dates from calendars.



Searching by Free-Text Access Points

Some fields in a patron record, such as free text blocks and notes, are free-text fields. You can use the wild card asterisk ***** to search these fields effectively. For example, if you are searching for records with the free-text block **Check phone**, you can type these search terms:

- **check phone** (case does not matter)
- **check** (implicit truncation search type - same as **check***)
- ***phone***

However, if you enter **phone** (no asterisks), you find only text that *begins with* phone.

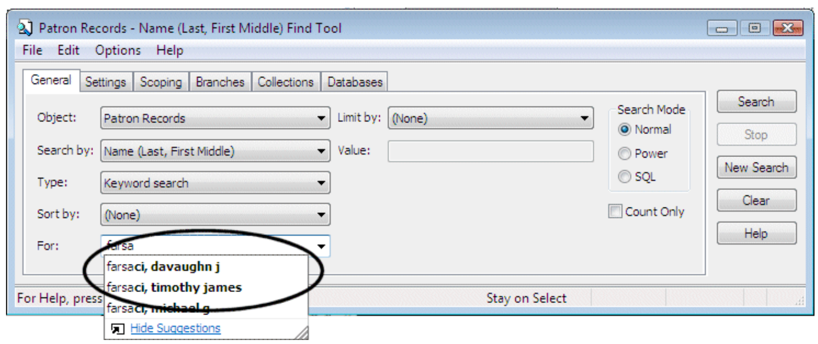
Searching by Phone Number

You can search by **Phone** or limit your search by this field. This is a free-text field (see "Searching by Free-Text Access Points" on page 11) that searches all three Phone fields in the patron record.

Automatic Search Term Suggestions

Search term suggestions may be displayed as you type your search term in the Find Tool **For** box when you select **Keyword search** or **Phrase search** in the **Type** box and search for patron records by any of the following access points:

- **Name (First Middle Last)**
- **Name (Last, First Middle)**
- **Address**
- **Email address**



You can click a suggestion to launch the search for the suggested term, or ignore the suggestions and continue to type your term. Click **Hide Suggestions** if you do not want to see suggestions during your search session.

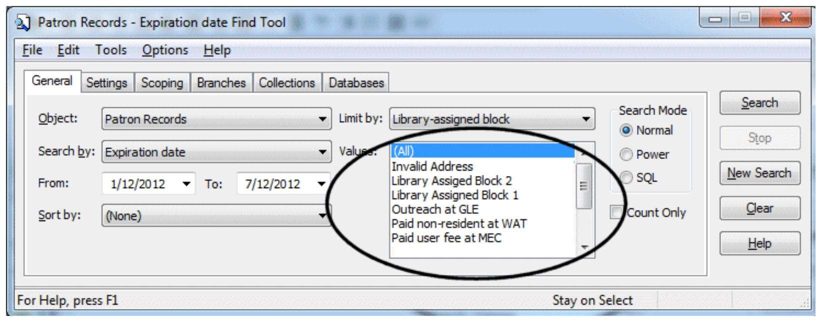
Note:
The search suggestions feature is controlled by the system-level Polaris Administration Cataloging parameter **Auto-suggest feature enabled.** See "Managing Auto-Search Suggestions" in the *Polaris Cataloging Guide 4.1R2*.

More Precise Searches

You can focus your searches to find what you need more easily:

- **Limit the search** - Select a search access point in the **Search by** box, select a limiter in the **Limit by** box, and select or type a value in the **Value** box. The values depend on the selected limiter.

  Example:
  To find the records of patrons whose registrations expire within a certain date range and who also have library-assigned blocks, set **Search by** to **Expiration date** and set the date range. Then select **Library-assigned block** in the **Limit by** list, and select **All** or a specific block in the **Values** list. (Library-assigned blocks are branch-specific, and the available choices depend on the settings for your logged-in branch.) Then click **Search**.



- **Do a power search** - You conduct complex, precise searches by writing Common Command Language (CCL) queries. See "Doing Power Searches" in the *Polaris Basics Guide 4.1R2*.
- **Do an SQL search** - If you have the appropriate permissions, you can search by typing an SQL query, and save the search. These searches produce convenient, quick reports. See "Setting Up SQL Searches" in the *Polaris Basics Guide 4.1R2*.

Faster Searches

You can set a limit on the number of records that can be returned in a single search. Specify the maximum number of records in the **Retrieval Limit** box on the Find Tool's Settings tabbed page.

Count-Only Searches

If you just need a quick count of the number of patron records with certain characteristics, select your search criteria and select (check) **Count only**. See "Doing a Basic Search" in the *Polaris Basics Guide 4.1R2*.

Sending Search Results to a Record Set

If you want to add specific patron records to a record set, select them in the results list, right-click the selected records, and select **Add to Record Set** from the context menu. See "Doing a Basic Search" in the *Polaris Basics Guide 4.1R2*. For more information about working with patron record sets, see "Bulk-Changing Patron Records" on page 72.

Find patron services and related records

Follow these steps to find a record using the Polaris Find Tool.

1. Open the Find Tool from the Polaris Shortcut Bar using one of the following methods:
   - To search for patron records to be displayed in the Patron Registration workform, select **Patron Services, Patron Records**, press **F7**, or click .
   - To search for patron records to be displayed in the Patron Status workform, select **Circulation, Patron Status**, press **F6**, or click .
   - To search for bibliographic records or item records, select **Cataloging, Bibliographic Records, Cataloging**, **Item Records,** or **Cataloging**, **Reserve Item Records**.
   - To search for course reserve records, select **Patron Services**, **Course Reserve Records**, or click .

   The General tabbed page of the Find Tool appears.

Tip:
For fast navigation, press the **TAB** key to move among the **Object**, **Search by**, **Type**, **Sort by**, **For**, **Limit by**, and **Values** boxes. Type the first letter of the search option in the **Object**, **Search by**, **Type**, and **Limit by** boxes.

2. Select the record type to search for in the **Object** box.
3. Select what to search by in the **Search by** box.

   Note:
   If you often search by the same criteria but they are not the default settings, you can save your own settings by selecting **Options, Save as User Default** from the Find Tool menu bar. See "Finding Polaris Records" in the *Polaris Basics Guide 4.1R2*.

4. Select the type of search in the **Type** box.
5. Select a sort order in the **Sort by** box and select a value.
6. Type a search string in the **For** box.

7. If you want to focus the search, select a limiter in the **Limit by** box, and set a value for the limiter in the **Value** box.

   If you type text in the **Value** box, you must type the exact text or use a wildcard character.

   Examples:
   To limit a patron record search by the free-text block **check phone**, you can type **check*** or **check phone** in the **Value** box, but not **check**.

   If you are searching for item records by title, and you limit by current borrower, type the patron's name in the **Value** box in one of these formats: **last name*** or **last name, first name*** or **last name, first name middle name**. You must include the comma and the wildcard character as shown. The last name alone will not work in the **Value** box.

8. Click **Search** to begin the search, or press **ENTER**.

   Your results appear in the results list at the bottom of the Find Tool window. To list all the results in a large results set, press **CTRL+SHIFT+A**.

9. Do one of the following actions to work with a record in the results list:
   - Double-click a line item to open the record.
   - Right-click a line item in the results list to work with the record without opening it. The context menu displays the options available for the record.

Related Information

More information about the Find Tool - See "Finding Polaris Records" in the *Polaris Basics Guide 4.1R2*.

Patron Registration

Patrons can be registered at any library location that has access to Polaris Patron Services. You can also register patrons offline, save the records, and upload the records to the online system or a system file. When you register a patron, you create a patron record that you can edit to reflect any changes to the account.

Note:
To register a patron quickly at check-out, you can do an express registration. See "Express-register a new patron at check-out" on page 102.

Your library may also allow patrons to set up new accounts through the PAC. In this case, you verify the new patron accounts before patrons can check out materials. See "Resolve a Verify Patron block" on page 118.

This unit covers the following topics:

Terms

association A relationship between two or more patron records so that when one record is open, all records associated with it are visible and accessible.

duplicate detection An automatic Polaris process to ensure that each patron is registered only once and that patron barcode numbers are not duplicated.

express registration Entering patron information during the check-out process as a service to new, unregistered patrons.

patron code A Polaris code used to maintain patron privileges and policies. The Polaris administrator can set up an unlimited number of patron codes, and each organization can decide which ones to display for selection.

reading history An optional list of items that a patron has checked out since the history was started. Renewals are not included in the list, but multiple check-outs of the same item are included.

significant digits A portion of the patron barcode defined as unique in Polaris Administration. Staff can enter just the significant digits in a patron barcode field, and patrons can enter just the significant digits to log on at the PAC.

Creating and Editing Patron Records

At a minimum, you must fill in the following Patron Record workform fields to create and save a patron record:

- Barcode
- Last name
- First name

Additionally, the following fields will always populate if the appropriate defaults are determined within the System Administration settings:

- Registered at
- Patron code
- Expiration term/date
- Address check term/date

Your library may require additional fields, and may set certain default values that allow you to create patron records more quickly (see “Setting Patron Registration Defaults and Requirements” in the *Polaris Patron Services Administration Guide 4.1R2*). Required fields are displayed in bold type on the Patron Record workform.

In addition, before you begin registering patrons, it is useful to decide upon some conventions. Do you use initial capitals, or all capitals? Do you abbreviate words, such as road and street, or spell them out? Do you enter phone numbers by separating the area code with parentheses or with a hyphen? While your conventions do not affect the way Polaris processes patron information, they do affect the appearance of your indexes and reports.

Patron Codes

Patron codes help to define patron privileges and policies. One list of patron codes is used throughout the entire system. The Polaris administrator generates the list and sets the codes that are appropriate for your site. For more information on setting up codes, see “Defining Patron Codes” in the *Polaris Patron Services Administration Guide 4.1R2*.

Registration Fees

Your library may charge a registration for specific patron codes. The fee is applied automatically at the time of registration or renewal, and the patron account is blocked until the charge is paid. If a fee has been defined for the patron code, the program displays a Registration Fee dialog box when the you select **Save** in a new patron record. The dialog box displays the amount of the fee and options to pay, waive, or charge the fee, as well as the option to print a receipt. For information about setting up registration fees, see "Charging for Patron Registration" in the *Polaris Patron Services Administration Guide 4.1R2*.

Patron Passwords and User Names

If a patron wants to be able to access her account or place requests through the PAC, a password must be specified on the Patron Registration workform. If a patron forgets the password, you replace the old password with a new one. (Keep in mind that passwords are case-sensitive.) You cannot see the password; only a series of asterisks appears in the **Password** box. For more information about setting a patron password and password format, see "Add general data to a patron record" on page 30.

The library may allow patrons to change their passwords online through the PAC or receive an e-mail message for forgotten passwords. To enable these features, see "Set patron password and user name options" in the *Polaris Public Access Administration Guide 4.1R2*. Using the same Administration control, the library can also specify an override password that staff members can use when patrons forget their account passwords.

Note:
A step in the nightly Patron Processing SQL job can assign the last four digits of the patron's primary telephone number (**Phone 1**) to the password field of the patron record if a password does not exist. This default password step is disabled at installation; if your library is interested in activating this feature, contact your Polaris Site Manager.

Your library may also allow patrons to enter user names instead of a barcode when logging in to use PAC functions such as viewing the patron account or placing a hold request (see "Setting Patron Access Options" in the *Polaris Public Access Administration Guide 4.1R2*). However, patron user names are not available to staff. Staff cannot assign them during patron registration, they are not searchable or available for reports, and they are not displayed in the patron record. Only patrons can create or change user names.

Note:
Your library may allow users to log on to PAC using network credentials instead of the Polaris patron barcode or username and password. For details, see "Active Directory Log-On to PAC" in the *Polaris Public Access Administration Guide 4.1R2*

User-Defined Fields in Patron Records

The patron record includes user-defined fields that are determined when Polaris is installed for your library system. (See "User-Defined Fields in Patron Records" in the *Polaris Patron Services Administration Guide 4.1R2*.) These fields can contain whatever additional data the library needs, such as the driver's license number or parent/guardian name. Some or all may be required. All user-defined fields can be searched from the Polaris Find Tool. See "Add general data to a patron record" on page 30.

Duplicate Detection

Duplicate detection ensures that patron barcode numbers are unique and that each patron is registered only once. When you attempt to save the patron record, it is automatically checked for duplicate barcodes. If the barcode is a duplicate, you have the option of either entering a new barcode or cancelling the registration.

After checking the barcode, the patron's full name (first, middle, and last) and birth date (if present) are checked for duplicates. Your library may specify additional fields for patron duplicate detection. See "Setting Patron Duplicate Detection" in the *Polaris Patron Services Administration Guide 4.1R2*. If any possible duplicate records exist, they are displayed in the Duplicate Patrons dialog box. To view more information about a record, right-click it and select **Open** from the context menu. The patron's record appears in the Patron Registration workform. You can continue with the registration or cancel it.

Note:
To conserve system resources, the Duplicate Patrons list is limited to 500 entries per duplicate detection criterion. For example, if 1,000 patrons have the same e-mail address and 30 have the same phone number, 530 possible duplicate records are listed.

Patron Registration from the PAC

Your library may allow patrons to self-register or update their account information through the PAC. For a new account, the patron provides basic information online, and receives a temporary barcode to use for placing requests. A new patron record is created with a Verify Patron block, and designated library staff members receive an e-mail message that the patron has self-registered. The same process applies to account updates from the PAC.

As part of the PAC registration process, the patron selects a home branch. The system uses the default settings for that branch to create the new patron registration. If the default patron code set for PAC registration is a chargeable code, the program displays a message to the patron. The default message is **Your library account will be charged a [$] registration fee. Do you want to continue?** If the patron chooses to continue, the fee is charged to the patron account and the Patron Registration Fee block is placed on the record. See "Registration Fees" on page 19.

- For information about reviewing the record and resolving Verify Patron blocks, see "Resolve a Verify Patron block" on page 118.
- For information about permitting patron self-registration and updates, see "Setting Up Patron Account Access" in the *Polaris Public Access Administration Guide 4.1R2*.

Create a patron record

Follow these steps to create a patron record from the Polaris Shortcut Bar.

Tips:
Other methods of creating a new patron record:
--From the Find Tool results list, right-click a patron record and select **Create Patron** from the context menu. See "Finding Patron Records" on page 9. The new patron registration workform opens. Go to step 3 below.
--On the Patron Registration workform for an existing record, select **File, New**, then clear or copy the current workform. Then go to step 3 below. See "Create a new record from a workform" in the *Polaris Basics Guide 4.1R2*.

1. Select **File, New** from the Polaris Shortcut Bar, click , or press **CTRL+N**.

   The New dialog box appears.

2. Select **Patron Record** in the **Objects** box, and click **OK**.

   The Addresses view of the Patron Registration workform appears.

Note:
If you are using Polaris offline, select **Patron Services, Patron Records** from the Polaris Shortcut Bar, or press **F7**, to display the Offline Registration workform.

Tip:
To replace a lost library card, open the patron's record and scan the barcode from the new card in place of the old barcode. The barcode is updated while the other registration information remains unchanged.

3. Scan the patron's barcode (from the new library card) in the **Barcode** box, or type the barcode and press **ENTER**.

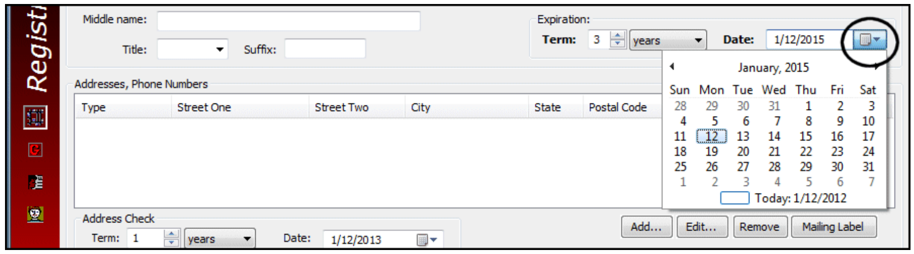
   If your library system allows you to use just the significant digits (the last unique portion) of a patron barcode, you can type just this part of the barcode. If the unique part of the barcode begins with one or more zeroes, you do not need to type these. The system supplies the complete barcode, including any leading zeros, and the complete barcode displays in the patron record. If you enter more than the defined number of significant digits, the system attempts to save the record with the digits you entered as the complete barcode. For more information about setting Polaris to use significant digits, see "Significant Digits in Patron Barcodes" in the *Polaris Administration Guide 4.1R2*.

Tip:
Press **TAB** to go from one field to the next in the Patron Registration workform. Press the space bar to select check boxes.

4. Type the patron's last name (at least one character) in the **Last name** box.

   Important:
   Do not use spaces when typing compound last names. For example, type **MacDonald** (instead of **Mac Donald**).

5. Type the first name in the **First name** box.
6. To input *optional* name information, follow these steps:
   a) Type the middle name in the **Middle name** box.
   b) Select the patron's title in the **Title** box.
   c) Type the patron's suffix (such as Sr., Jr., II, or Ph.D.) in the **Suffix** box.
7. Select the patron's registration location in the **Registered at** box.
8. Select the patron's code in the **Patron code** box.
9. Use one of the following methods to set the registration term:
   - **Set a date according to the current date** (such as two years from today) - Type a number in the first Expiration **Term** box, and select **months** or **years** in the second **Term** box. The exact date is automatically calculated and appears in the Expiration **Date** box.
   - **Type a specific date** - Type the expiration date in the format shown. You can use the right arrow key to go from segment to segment of the date.
   - **Select a date from a calendar** - Click the down arrow by the **Expiration Date** box and select the expiration date from the calendar.



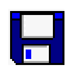
You can scroll through months and years with the arrows at the top of the calendar. For detailed information, see "Using Date Pickers" in the *Polaris Basics Guide 4.1R2*.

10. Complete the patron record by doing these procedures:

- "Add an address to a patron record" on page 24
- "Add notification data to a patron record" on page 27
- "Add general data to a patron record" on page 30

11. Select **File, Save** to save the record.

- The Duplicate Patrons dialog box may appear. It lists the potential duplicate patron records, if any are found. To view more information about a listed record, right-click it and select **Open** from the context menu. The selected record appears in the Patron Registration workform. If you find a duplicate, click **Cancel** on the dialog box to stop saving the new record. Otherwise, click **Continue** to continue saving the record. The status bar indicates that the record is saved.

  Note:
  Certain menu options and toolbar buttons may be unavailable until you save the record. You do not need to close the record and re-open it. Simply select **File, Save** or click .

- The Patron Registration Fee dialog box may appear if the patron code requires a registration fee (see "Registration Fees" on page 19). You have the following options for handling the fee:

  Pay - You must have the permission **Fines: Pay fines at circ** to use this option. If so, the Pay dialog box opens. Payment methods may include credit card payments if your branch has implemented these. Partial payments are possible. If a fee is partially paid, a block is placed on the patron account (see "Working with Blocks (Stops)" on page 116). If the option to print a receipt was selected, a receipt prints.

  Note:
  The **Print Receipt** option is selected by default. Receipts are printed using the printer and driver set up for the Check Out workform printer. It is not necessary to check any specific receipt type on the Check-out options dialog box, but the printer and driver must be defined. See "Set the workstation to print receipts and slips" on page 81. The specific information printed is that selected for fine receipts in Polaris Administration with the Patron Services parameter **Fine receipt options**. See "Set fine receipt options" in the *Polaris Patron Services Administration Guide 4.1R2*.

Waive - You must have the permission **Fines: Waive fines at circ** to use this option. A waive transaction is recorded for the patron, and a receipt prints if the receipt option was selected.

Charge - The charge is written to the patron account. The charge reason is listed as **Registration fee** and a block is placed on the patron account (see "Working with Blocks (Stops)" on page 116). For more information about resolving charges on the patron account, see "Processing Charges and Payments" on page 179.

Related Information

- **Barcode formats** - Polaris can be set to distinguish between patron and item barcodes. If you input a barcode that is the incorrect type or format for the field, Polaris displays a warning message. You need permission to continue to save the record with an invalid barcode. For information on defining barcodes, setting Polaris to use significant digits in patron barcodes, and permission to save records with invalid barcodes, see "Defining Barcode Formats" in the *Polaris Administration Guide 4.1R2*.
- **Scan driver's license** - California libraries with the appropriate Polaris license can scan a new patron's driver's license to enter basic information in a new patron record. See "Scan driver's license to enter patron information" on page 34.
- **Patron photos** - If your library includes photos in patron records, see "Working with Patron Photos" on page 37.
- **Course instructors** - If your library uses course reserve functions, and the new patron is an instructor for a course, you can link the patron record to the course. See "Add instructors to a course reserve record" on page 308. When the patron is linked to a course record, the **Instructor** box is automatically checked on the Patron Registration workform.
- **Express registration** - You can register a new patron quickly from the Check Out workform. See "Express-register a new patron at check-out" on page 102.
- **Registration reminder messages** - Your library can send e-mail notices to prompt patrons to renew their registrations or verify their registration information. See "Reminder Notices" in the *Polaris Patron Services Administration Guide 4.1R2*.

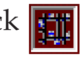
1-2-3

Add an address to a patron record

You can specify multiple addresses for a patron, such as home and office addresses. Follow these steps to add an address to a patron record.

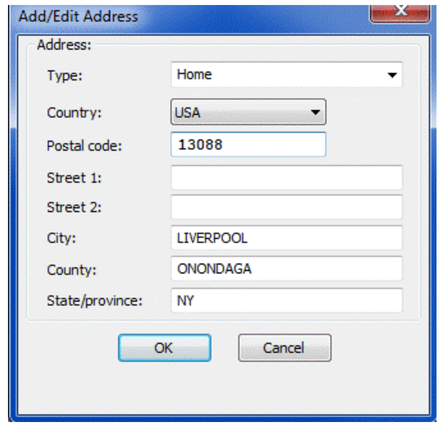
> **Note:**
> For more information on setting up patron records, see "Create a patron record" on page 21.

1. If the patron record is not already open, select **Patron Services, Patron Records** to find and open the patron's record. See "Find patron services and related records" on page 14.

The Patron Registration workform - Addresses view appears. If you are working with a new patron record that is already open, you may need to select **View, Addresses** or click  to display this view.

2. Click the **Add** button under the Addresses, Phone Numbers list area.

   The Add/Edit Address dialog box appears.



3. Select the type of address, such as **Home** or **Work**, in the **Type** box.

   Note:
   If your library uses course reserve functions, and this patron is an instructor for a course, specify **Office** for the address that should appear in the course reserve record. Instructors' office addresses offer two lines (Office 1 and Office 2). They do not include Zip code or other mailing address information. If you do not specify an office address, the **Home** address is used for the course reserve record.

Tip:
In the **Country** box, you can type the first letter of the country to select the country.

4. Select the country in the **Country** box.
5. Type the U.S. Zip code (or another country postal code, if appropriate) in the **Postal Code** box.

   Note:
   If you backspace or press the **DELETE** key in the middle of typing a Canadian postal code, the control appears not to work. Select **USA** to clear the box, then select **Canada** again and type the postal code in the correct format, for example **H3Z 1X4**. Do not type a hyphen between the two groups of characters.

   For U.S. Zip codes and Canadian postal codes, Polaris automatically fills in the **City**, **State/province**, and **County** boxes, or displays a pop-up dialog box. If the pop-up box appears, *double-click* the correct city-state-county combination. The **City**, **State/province**, and **County** boxes are filled in.

   Note:
   You must have the permission **Patron registration: Modify postal address fields** to enter an entirely new city/state/country/postal code combination. Otherwise, you can only select an existing combination. See "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*.

6. If you entered a postal code for a country other than the U.S. or Canada, type the city in the **City** box, type the state or province in the **State/province** box, and type the county (if appropriate) in the **County** box.

7. Type the street address or post office box number in the **Street One** box.

   You can use the **Street Two** box for additional information, such as the apartment or suite number, or leave it blank. You must enter information in at least one **Street** box in order to save the address.

8. Click **OK** to submit the address information.

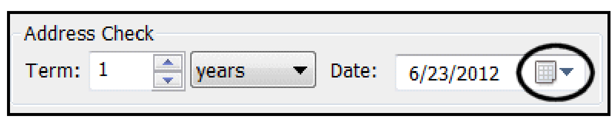
   The Addresses view appears with the address information in the Addresses, Phone Numbers list.

9. Select **File, Save** to save the record.

Set the address update term

Use one of the following methods to set the address update term:

- **Set a date according to the current date** (such as two years from today) - Type a number in the first **Address Check Term** box, and select **months** or **years** in the second **Term** box. The exact date is automatically calculated and appears in the **Address Check Date** box.
- **Type a specific date** - Type the address check date in the format shown in the **Date** box. You can use the right arrow key to go from segment to segment of the date.
- **Select a date from a calendar** - Click the down arrow by the **Date** box and select the expiration date from the calendar.



Related Information

- **Editing an address** - To edit an address, for example when a patron moves, you use the same Add/Edit Address dialog box that you use to create addresses. Select the address in the Patron Registration workform - Addresses view, and click **Edit...**., or right-click the address and select **Edit** from the context menu.

  Note:
  You must have the permission **Patron registration: Modify postal address fields** to enter an entirely new city/state/country/postal code combination. Without this permission, you can only select an existing combination. See "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*.

- **Deleting an address** - To remove an address, such as when a patron no longer uses a business address, select the address in the Patron Registration workform - Addresses view, and click **Remove**. Or right-click the address and select **Remove** from the context menu.
- **Patron updates from PAC** - Your library may allow patrons to change their own addresses, as well as other information in their records, through Polaris PowerPAC and Mobile PAC. In this case, a staff member reviews the changes. See "Resolve a Verify Patron block" on page 118.
- **Mailing labels** - You can print patron mailing labels or export patron addresses to use in another application. See "Creating Patron Mailing Labels" on page 65.
- **Scan driver's license** - California libraries with the appropriate Polaris license can scan a new patron's driver's license to enter basic information in a new patron record. See "Scan driver's license to enter patron information" on page 34.

Add notification data to a patron record

Notification data specifies when address information should be updated and how the patron wants to receive notices, such as for held and overdue items. Follow these steps to add notification data to a patron record.

Note:
For more information on setting up patron records, see "Create a patron record" on page 21.

1. If the patron record is not already open, select **Patron Services, Patron Records** to find and open the patron's record. See "Find patron services and related records" on page 14.

   The Patron Registration workform - Addresses view appears. If you are working with a new patron record that is already open, you may need to select **View, Addresses** or click to display this view.

2. Input the patron's address data if you have not already done so. See "Add an address to a patron record" on page 24.

Tip:
The default setting in the Address boxes is the first address in the Addresses, Phone Numbers list.

3. Select the address for receiving notifications in the **Notices address** box.
4. (Optional) Type the patron's e-mail address in the **Email address** box.

   This address can be used for sending overdue, billing, request, e-mail reminder, and routing notices, as well as e-mail receipts. To deliver notices to a patron via e-mail, the **Notification option** box must be set to **Email Address**.

   Your library determines whether e-mail notices are sent in HTML format or plain text format by default. On the Patron Registration workform- General view, you can set the format if the patron prefers a format different from the default format. See "Add general data to a patron record" on page 30. (E-mail receipts are always sent in plain text format. See step 14 for information about setting this option.)

Note:
You can send reminder notices and special announcements to any patron with an e-mail address in the patron record, regardless of the setting in the **Notification option** box. See "Set up e-mail reminder notices" in the *Polaris Patron Services Administration Guide 4.1R2*.

5. Select (check) **Additional TXT notice** if the patron's mobile phone accepts text messages and your library sends text messages *in addition to* other types of notices such as e-mail or print (see step 13). A patron will receive the additional text message only if the **Additional TXT notice** option is checked in the patron record *and* one **Phone** field is a mobile phone with a selected carrier. Also, the **TXT** option *must* be selected for that phone number. A phone number designated for text messages must be 10 digits only; do not include the 1 prefix for long distance calls.

   Note:
   Some mobile phone service carriers charge their customers for text messages received, so these patrons may not want to receive additional text messages.

6. (Optional) Type an alternative e-mail address in the **Alt Email address** box.

Tip:
The Phone 1, Phone 2, and Phone 3 numbers are used for phone notification, voice mail messages, and if any are mobile phones, for text message notices and receipts.

7. Type the patron's phone number in the **Phone 1** box (include 1+area code for long distance numbers).
8. If you want to use additional phone numbers, type the phone numbers in the **Phone 2** and **Phone 3** boxes (include 1+area code for long distance numbers).

   You can enter up to three phone numbers.

9. If any of the **Phone** numbers are mobile phones, select a carrier for the number or numbers from the drop-down list next to the phone number field.

   The available carriers are set in Polaris Administration. See "Delivering Notices by Text Message" in the *Polaris Patron Services Administration Guide 4.1R2*.

10. To designate a mobile phone number for text message notices and/or receipts, check the **TXT** box next to the phone number.

    Any one **Phone** number can be designated as **TXT**, allowing for text notification or text message receipts to that number. You must specify a carrier for the phone number if the **TXT** option is selected for that number.

    A phone number designated for text messages must be 10 digits only; do not include the 1 prefix for long distance calls.

11. (Optional) Type the fax number in the **FAX number** box (include 1+area code for long distance numbers).

12. Select the method by which the patron prefers to receive notices in the **Notification option** box.

> **Note:**
> When your library sets up notification, the library can specify patron preference as the notification method for a specific notice type. In this case, the notice is sent by the method specified in the patron record. However, the library may choose to deliver certain notices by a specific method regardless of patron preference. See "Managing Notification" in the *Polaris Patron Services Administration Guide 4.1R2*.

- You can use the Phone options only if the library has telephony software for automatic telephone notification. You can select **Phone 1, Phone 2,** or **Phone 3** for the phone notification, but be sure the corresponding phone number has been supplied when selecting a phone notification option.
- If you select the **E-mail Address** option for notification, the patron record must include an e-mail address. On the Patron Registration workform - General view, you can specify plain-text e-mail format if that is the patron's preference.
- If you select the **TXT Messaging** option for notification, one **Phone** field must be a mobile phone with a selected carrier, and the **TXT** option must be selected for that phone number.

> **Note:**
> Some mobile phone service carriers charge their customers for text messages received, so these patrons may prefer a different notification method.

- You can exclude the patron from receiving certain notices, and make this patron exempt from collection agency processing. See "Add general data to a patron record" on page 30. To prevent the patron from receiving any notices at all, select **None** in the **Notification option** box.
- Selecting **None** in the **Notification option** menu will suppress all notices to the patron.

13. If your library has enabled eReceipts (e-mail receipts, TXT receipts, or both) and this patron prefers to receive check-out, renewal, and fine receipts by e-mail or TXT, select the appropriate option from the **eReceipt option** list.

    At check out and renewal, the patron will receive an eReceipt when both the patron's branch and the workstation's log-on branch (transacting branch) have enabled eReceipts.

    To receive e-mail receipts, the patron record must include an e-mail address. If the record includes both primary and alternate e-mail addresses, the receipt is sent to both addresses. To receive TXT receipts, one **Phone** field must be a mobile phone with a selected carrier, and the **TXT** option must be selected for that phone number. A separate TXT receipt is sent for each item checked out or renewed.

    For information about eReceipt settings in Polaris Administration, see "Setting Up eReceipts" in the *Polaris Patron Services Administration Guide 4.1R2*.

14. Select **File, Save** to save the record.

Related Information

- **Setting up notification** - See "Managing Notification" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Notification language** - If your library has purchased the Polaris multilingual option, the patron may be able to receive notices in the language specified in the patron record. See "Add general data to a patron record" on page 30.

Add general data to a patron record

The patron record contains general data that may be used for statistical purposes, as well as any user-defined fields that are determined by the library at installation. This section of the patron record also allows you to exempt a patron from overdue notices, hold request notices, or collection agency processing. You also set the patron's password and language preference in this section. Follow these steps to add general data to a patron record.

Note:
For more information on setting up patron records, see "Create a patron record" on page 21.

1. If the patron record is not already open, select **Patron Services, Patron Records** to find and open the patron's record. See "Find patron services and related records" on page 14.

Tip:
You can press **CTRL+TAB** to change views.

2. Select **View, General** or click to display the General view.
3. Click one of the following Gender options:
   - **Male**
   - **Female**
   - **N/A** - Use this option when your library does not track gender, or a group or organization is being registered as a patron.

   Your library may require you to choose **Male** or **Female**. If so, the word **Gender** appears in bold type.
4. Select the appropriate statistical code in the **Statistical class** box. These are codes defined by your library for statistical or reporting purposes.

   Note:
   If you are changing the patron's registration branch and the statistical class is valid at the new branch, the statistical class remains in the edited record. Otherwise, the statistical class is set to **None**.
5. Type the patron's password in the **Password** box.

   The patron uses this password, together with the patron barcode or user name, to access her account or place holds in the PAC. The password must be a minimum of 4 characters and a maximum of 50, and may include alpha-numeric characters as well as special characters, such as %, @, and $. Passwords are case-sensitive. Do not include spaces. The password will display as a series of asterisks (*) for security purposes. For additional information, see "Patron Passwords and User Names" on page 19.

Note:
Your library may limit the number of times a patron can try to log in to the PAC without success. At the first attempt, the system starts timing the attempts to log-in. When the limit has been reached and 5 minutes have passed from the first attempt with no successful log-in, a message appears and the patron must wait 5 minutes before trying to log in again. If you reset the patron's password from the staff client after at least one log-in attempt, the patron may have to wait 5 minutes before attempting to log in with the new password.

6. Select the patron's primary language in the **Language** box.

Note:
If your library has purchased the Polaris multilingual option, and the language you select is supported for notices, the patron can receive notices in this language. For more information about setting these up in Polaris Administration, see "Managing Notification" in the *Polaris Patron Services Administration Guide 4.1R2*.

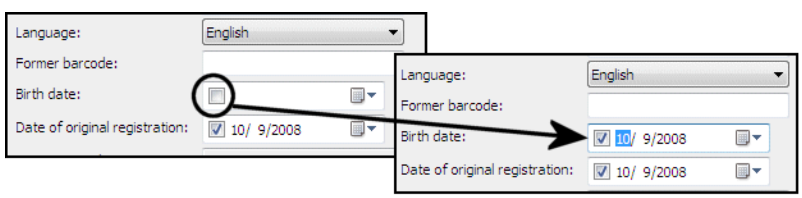
7. If appropriate, scan the patron's previous ID (the barcode found on the patron's old library card) in the **Former barcode** box or type the barcode and press **Enter**.

8. Enter the patron's birth date in the **Birth date** box using one of these methods:

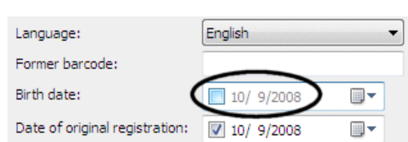
Note:
You can enter a birth year in the patron record that is earlier than 1900. For example, if you do not ask patrons their birth year at registration, you can enter 1776 as a placeholder. You can save dates as early as 1753.

Tip:
You can select the check box with the space bar. This is convenient if you prefer to use the keyboard instead of the mouse.

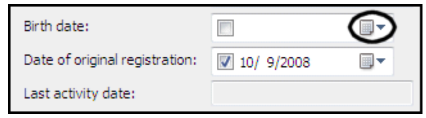
- **Type a specific date** - Select (check) the box in the **Birth date** field, then type the birth date in the format shown. You can use the right arrow key to go from segment to segment of the date.



Note:
If you uncheck the check box, the date may be gray or it not be visible. It reappears when you check the check box again. In any case, the date is not saved with the patron record unless the check box is checked.



- **Select a date from a calendar** - Click the down arrow in the **Birth date** field and select the birth date from the calendar.



9. Verify the date of registration in the **Date of original registration** box.

   Note:
   If you uncheck the check box, the date may be gray or it not be visible. It reappears when you check the check box again. In any case, the date is not saved with the patron record unless the check box is checked.

10. If you want Polaris to track a reading history for the patron, select the **Maintain permanent reading list** check box. See "Working with Reading Histories" on page 42.

11. If the patron will receive e-mail notices or reminders from the library, and prefers plain-text e-mail, select (check) **E-mail notices in plain text**.

    Certain e-mail servers send HTML messages in odd format, or insert strange characters in the messages. If the patron is experiencing these problems, set the format to plain text.

    Note:
    Plain-text e-mail notices have the following limitations:
    —Detail content is displayed in separate lines instead of in one line or one group.
    —Claimed items are included even if **Include claimed items** is not checked for overdue notices (Notification options - Overdue tab).
    —Combined notices may include some fields that are correctly suppressed in HTML notices.

12. To prevent this patron record from being deleted, select the **Do not delete patron record** check box.

13. To prevent this patron from being reported to the collection agency, select the **Exclude from collection agency** check box.

14. To prevent this patron from receiving overdue notices, select the **Exclude from overdue notice** check box.

15. To prevent this patron from receiving bills, select the **Exclude from billing** check box.

16. To prevent this patron from receiving hold request and cancelled request notices, select the **Exclude from hold notice** check box.

    Note:
    To prevent the patron from receiving any notices at all, set the notification option to **None** on the Addresses view. See "Add notification data to a patron record" on page 27.

17. If your library requires additional patron information, type or select the appropriate data in the **User defined fields** boxes.

Tip:
If your library uses Polaris outreach services processing, you may want to check the **Exclude from hold notice** option to prevent an outreach services patron from receiving a hold notice when a selection list item becomes held for delivery to the patron. See "Outreach Services Processing" on page 274.

Your library may use free-text user defined fields, drop-menu fields with specific options, or both. The user defined fields are indexed for searching. Your library may choose not to use all five.

18. Select **File, Save** to save the record.

Create or edit a patron status note

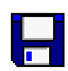
You can create, edit, and delete notes for a patron's account through the Patron Status workform - Notes view. You can create non-blocking or blocking notes. Non-blocking notes do not block circulation or hold requests. Blocking notes block a patron at normal check-out or renewal. The text of the note does not appear in the PAC. Follow these steps to create or edit a note on a patron record.

> **Note:**
> Blocking notes do not affect offline circulation, Polaris ExpressCheck circulation, SIP/NCIP circulation, or renewal from PAC.

1. Display the patron's record in the Patron Status workform using one of these methods:
   - If the Patron Registration workform is open, select **Links, Patron Status** or press **F9**.
   - From the Polaris Shortcut Bar, select **Circulation, Patron Status** to find the record. See "Find patron services and related records" on page 14.

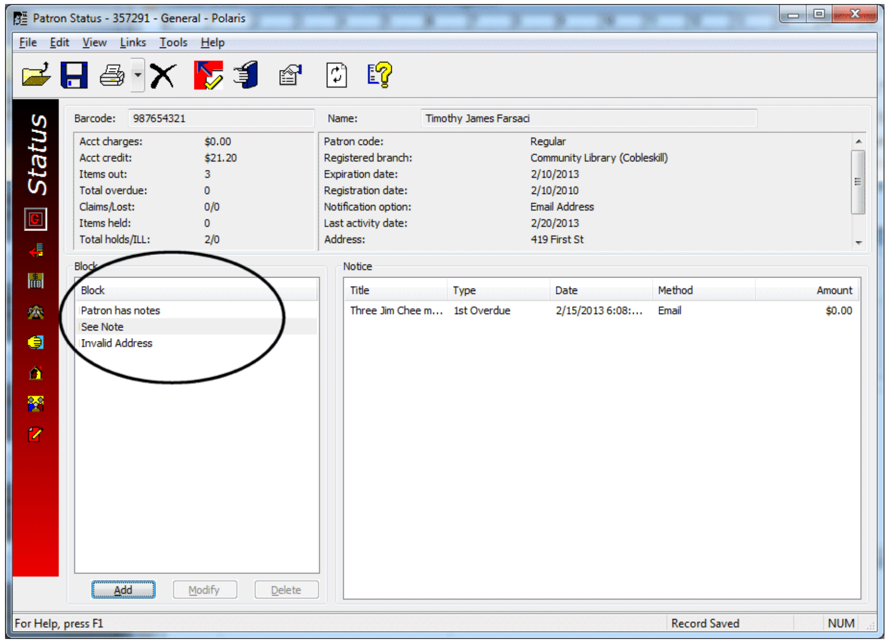
2. Select **View, Notes** or click  to display the Notes view.

3. Type and edit text in the **Non-blocking** or **Blocking** Notes box. (To start a new line, press **Enter**.)

4. Select **File, Save** or click .

   The status bar indicates that the note has been saved.

   When a patron record has a blocking note, the Patron Status workform - General view lists **Patron has notes** in the **Block Description** list, and the Notes view icon is red. (If the patron has only non-blocking notes or messages, the icon is yellow; if there are no notes, it is blue.)



Related Information

- **Deleting notes** - To delete patron status notes, display the patron's record in the Patron Status workform - Notes view, select the text and press the **DELETE** or **BACKSPACE** key.
- **Posting patron messages** - The Patron Status workform - Notes view also provides options for posting messages to the patron account. The patron can read the messages in the PAC patron account. See "Posting Patron Messages" on page 47.
- **Blocks at circulation** - See "Working with Blocks (Stops)" on page 116.

Scan driver's license to enter patron information

California libraries with the appropriate Polaris license can scan a new patron's driver's license to enter basic information in a new patron record. This feature requires a free-text user-defined field (UDF) in the patron record designated for the driver's license number. For details, see "Scanning a Driver's License for Patron Registration" in the *Polaris Patron Services Administration Guide 4.1R2*.

Follow these steps to scan a California driver's license for new patron registration.

> **Note:**
> You can also find and open an existing patron record. When the driver's license is scanned, existing data is overwritten by the driver's license data. Driver's license address information overwrites the Home address in the patron record.

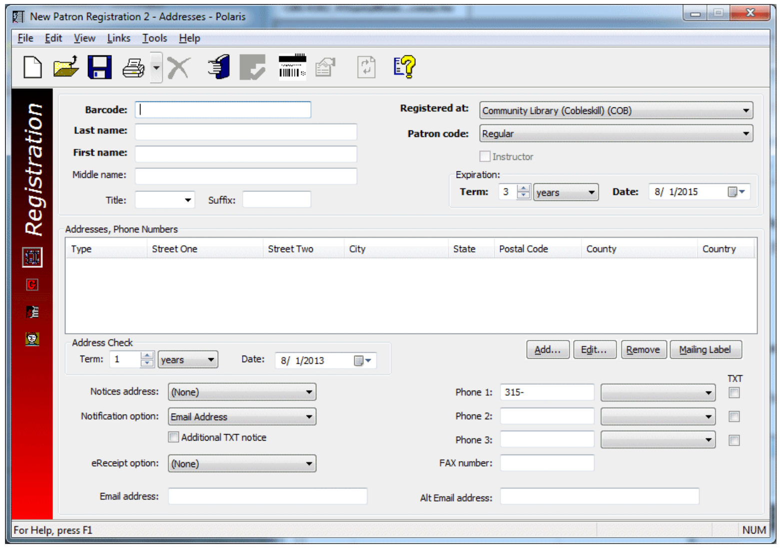
Tips:
Other methods of creating a new patron record:
--From the Find Tool results list, right-click a patron record and select **Create Patron** from the context menu. See "Finding Patron Records" on page 9. The new patron registration workform opens. Go to step 3 below.
--On the Patron Registration workform for an existing record, select **File, New**, then clear or copy the current workform. Then go to step 3 below. See "Create a new record from a workform" in the *Polaris Basics Guide 4.1R2*.

1. Select **File, New** from the Polaris Shortcut Bar, click , or press **CTRL+N**.

   The New dialog box appears.

2. Select **Patron Record** in the **Objects** box, and click **OK**.

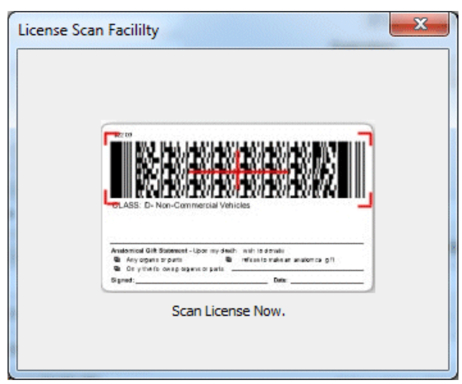
   The Addresses view of the Patron Registration workform opens.



Tip:
The menu option, icon, and shortcut key combination are not available if the Drivers License Scan Facility license is not active.

3. Select **Tools, Scan Driver's License**, click on the toolbar, or press **CTRL-L**.

   The License Scan message box opens.



4. Scan the 2D barcode on the driver's license with the message box open, then close the message box.

   The following driver's license data is entered in the patron record:

   - Name (Last, First Middle)
   - Street address (up to two lines)
   - City
   - State
   - Postal code

     Note:
     The address information is entered in the Home address fields in the Patron Registration workform.

   - Birth date
   - Gender
   - License number (entered in the designated user-defined field)

     Note:
     If the data cannot be scanned properly (for example, the barcode image is worn), a message is displayed and no data is entered in the patron record. You can continue to register the patron by filling in the required information manually.

5. Enter any additional data as needed, and save the record.

Working with Patron Photos

Your library may include the patron's photo in the patron record. Working in the Patron Photo view of the Patron Registration workform, you can take a photo, replace an old photo with a new one, upload an existing photo, or delete the photo from the patron record. If the workstation is set to display the photo, it also appears on the Check Out workform with the other patron information. Patron photos do not appear in the PAC.

You may find it convenient to have a computer workstation and work area dedicated to taking photos. You can mark a spot on the floor for patrons to stand so that you do not have to refocus the webcam for each photo.

You need certain permissions to work with patron photos, your workstation must be equipped with a webcam, and the workstation must be set up in Polaris Administration to display photos. See "Setting Up Patron Photo IDs" in the *Polaris Patron Services Administration Guide 4.1R2*.

> **Note:**
> You cannot install webcam software on a thin client (terminal server environment) or use it via Remote Desktop, so you cannot take new patron pictures by these means. However, if the pictures are loaded from another source or captured on a conventional workstation with webcam software, they are displayed normally in terminal server and Remote Desktop environments. See "Add a new photo (terminal server environment and RDP)" on page 39 for a suggested workflow.

Add a new photo to a patron record

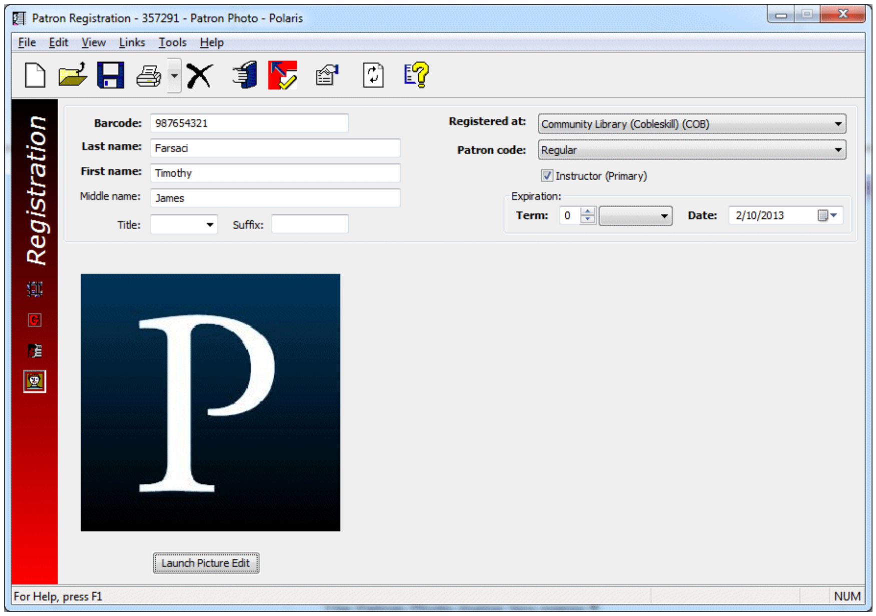
Follow these steps to add a new photo to a patron record.

1. If the patron record is not already open, select **Patron Services, Patron Records** to find and open the patron's record in the Patron Registration workform. See "Find patron services and related records" on page 14.

   > **Note:**
   > If you are registering a new patron, enter the required information and save the record. See "Create a patron record" on page 21. Then go to step 2.

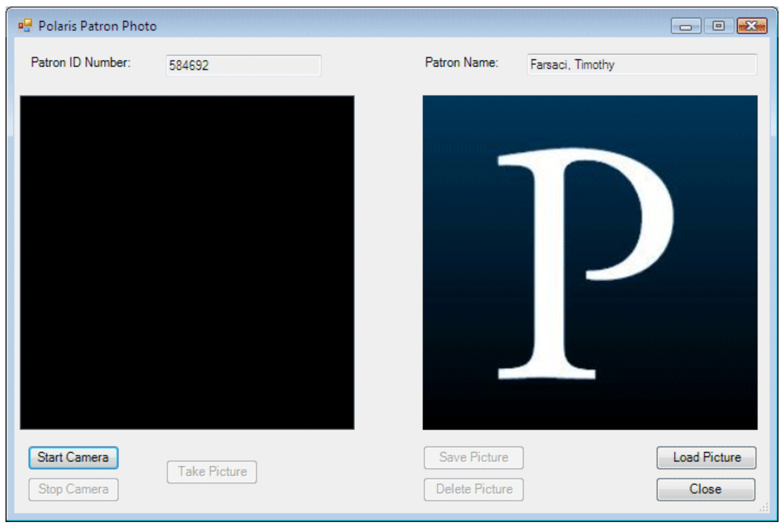
2. On the Patron Registration workform, select **View, Photo**, or click .

   The Patron Registration workform - Patron Photo view opens.



3. Click **Launch Picture Edit**.

   The Patron Photo dialog box opens.



4. Click **Start Camera**.

   The real-time image from the webcam appears in the left panel of the Patron Photo dialog box.

5. When the image is satisfactory, click **Take Picture.**

   The still photo appears in the right panel.

Tip:
Follow these same steps to replace an existing photo with a new one. The new photo overlays the old one.

6. Click **Save Picture** to save the picture in the patron record.

   You can see the date the patron photo was added to the patron record on the Properties sheet, About tabbed page. To open the Properties sheet from the Patron Registration or Patron Status toolbar, press **F8**, select **File, Properties**, or click the Properties icon .

   Note:
   Patron photos are saved directly in the Polaris database, not as a separate collection of image files.

Related Information

- **Deleting a photo** - To delete a photo from the patron record, simply click **Delete** on the right side of the Patron Photo dialog box.
- **Using an existing photo** - See “Upload an existing photo to a patron record” on page 40.
- **Replacing the default photo** - Polaris displays a default image (the Polaris logo) in the patron record and on the Check Out workform when the patron record does not include a photo. To use your own default image, see “Replace the default photo” in the *Polaris Patron Services Administration Guide 4.1R2*.

1-2-3

Add a new photo (terminal server environment and RDP)

Because you cannot install webcam software on a thin client (terminal server environment) or use it via Remote Desktop (RDP), you cannot take new patron pictures by these means. However, you can take photos at a conventional workstation dedicated to this purpose and add them to patron records via terminal server or RDP. Follow these steps to add a new photo to a patron record in a terminal server environment or RDP.

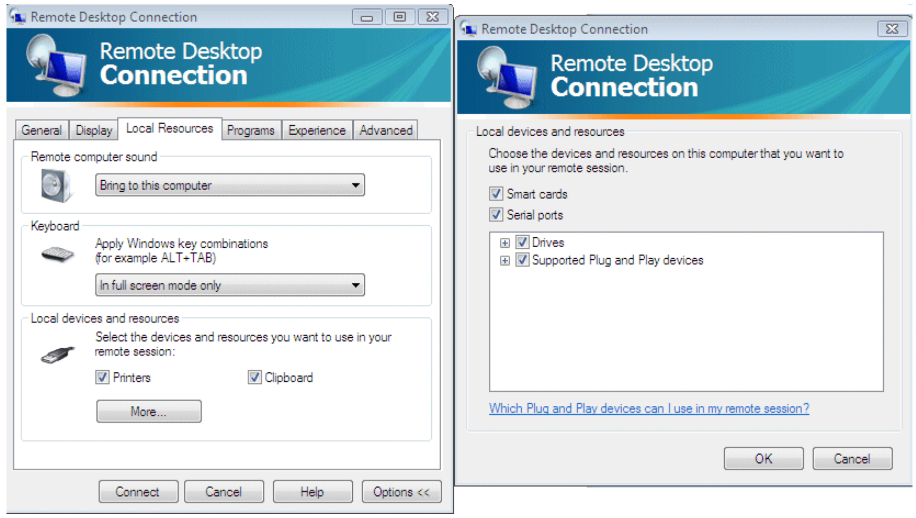
1. (First time only) Working at the computer with the webcam, create a folder on the hard drive for patron photos.
2. If you are connected to Polaris via an RDP connection, minimize the connection.
3. Start the manufacturer’s photo software for your camera, and take the patron’s picture.
4. When you and the patron are satisfied with the photo, maximize the RDP connection for your terminal server and Polaris.
5. Check to be sure your local drive is shared out:
   - Select **Start, My Computer** (Windows Server 2003) or **Start, Computer** (Windows Server 2008).
   - Confirm that your workstation name is identified with **C:**. If it is not, follow these steps:

   a) Log off Polaris if you are logged in.

b) Log off your RDP connection.

c) Open the RDP connection for Polaris and click **Options>>**.

d) Select the **Local Resources** tab and click **More**.



e) Select (check) **Drives** to make the workstation drive available during your RDP session, and click **OK**.

f) Select the **General** tab, and click **Save**.

g) Click **Connect**.

h) Confirm that your local drives are in your RDP connection by selecting **Start, My Computer**.

6. Log in to Polaris and open the appropriate patron record.

7. To add the photo to the patron record, follow the steps in "Upload an existing photo to a patron record" on page 40.

Upload an existing photo to a patron record

You can use an existing .jpg or .bmp image file in the patron record instead of taking a new photo. The default location for existing image files is **C:/Program Files/Polaris/[version]/Bin,** but you can upload files from any location to which you have network access. The image file cannot be larger than one megabyte (MB). Follow these steps to use an existing image.

1. If the patron record is not already open, select **Patron Services, Patron Records** to find and open the patron's record in the Patron Registration workform. See "Find patron services and related records" on page 14.

Note:
If you are registering a new patron, enter the required information and save the record. See "Create a patron record" on page 21. Then proceed to step 2.

2. On the Patron Registration workform, select **View, Photo**, or click .

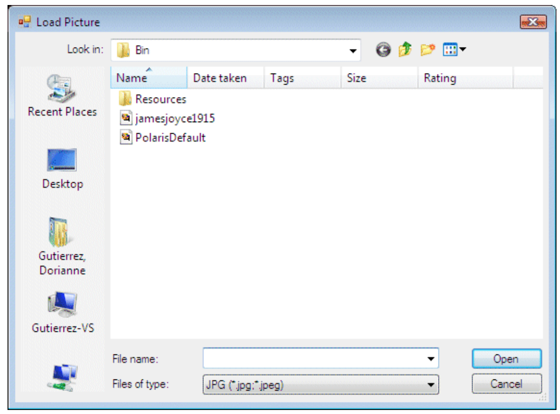
   The Patron Registration workform - Patron Photo view opens.

3. Click **Launch Picture Edit**.

   The Patron Photo dialog box opens.

4. Click **Load Picture** on the right side of the Patron Photo dialog box.

   A Windows Explorer dialog box opens.



5. Navigate to the image file location.

6. Select **JPG** or **BMP** in the **Files of type** box.

7. Select the file and click **Open**.

   The Windows Explorer dialog box closes, and the selected image appears on the right side of the Patron Photo dialog box.

8. Click **Save Picture** to save the picture in the patron record.

Working with Reading Histories

Your library can save a reading history in a patron's record to keep track of what the patron has read and what she might like to read again. The reading history lists information about each item the patron has checked out since the history was started. Renewals are not included in the list, but multiple check-outs of the same item are included. Even if an item or bibliographic record is deleted, the entry remains in the reading history.

Polaris Administration settings determine how long reading histories are kept and how many items can be in the list. When these limits are exceeded, entries are automatically deleted, starting with the oldest. See "Setting Reading History Options" in the *Polaris Patron Services Administration Guide 4.1R2*. For example, your library might decide that reading histories can list items checked out over the past two years, with a maximum of 500 entries. When two years have passed since an item was checked out, it is automatically removed from the list. Also, if the history contains 500 entries and a new item is checked out, the earliest entry in the list is automatically removed, according to the entry's creation date.

Note:
An entry's creation date is usually, but not always, the check-out date. For example, offline uploads may cause some variation. Also, the exact time of check-out is not considered. If several items were checked out on the same date, the items are deleted in an unspecified order.

If your system includes outreach services, Polaris uses the patron's reading history to create selection lists for patrons. Reading histories are automatically activated for outreach services patrons, even if your branch does not normally keep reading histories, and outreach services patrons can rate titles in their reading histories. See "Outreach Services Processing" on page 274. Separate settings in Polaris Administration control how long reading histories are kept and how many items can be in the list for outreach services patrons.

With the appropriate permissions, you can remove individual items from a patron's reading history. Your library may also allow patrons to view their reading histories from the PAC, start and stop the recording their histories, and remove individual items from their histories.

Note:
Quick-circ (ephemeral) item check-outs are not included in reading histories. See "Circulating Ephemeral Items" on page 143.

Start a patron’s reading history

A new reading history begins with the next item checked out; it does not include items checked out in the past or items currently checked out. Also, items are not added to the reading history immediately upon check-out. The reading history is updated during overnight processing. Follow these steps to start a reading history for a patron.

Note:
Your library must make the appropriate Polaris Administration settings for maintaining reading histories. See “Setting Reading History Options” in the *Polaris Patron Services Administration Guide 4.1R2*.

1. Select **Patron Services, Patron Records** to find and open the patron’s record. See “Find patron services and related records” on page 14.

   The Patron Registration workform - Addresses view appears.

2. Select **View, General** to display the General view.
3. Select the **Maintain reading list** check box.
   - If the patron’s “registered at” branch has not enabled reading histories in Polaris Administration, this option is not available.
   - If the patron is an outreach services patron, this option is automatically selected. See “Outreach Services Processing” on page 274.
4. Select **File, Save** to save the record.

   The next item checked out is displayed on the Patron Status workform - Reader Services view, after overnight processing is run. See “View a patron’s reading history” on page 43.

View a patron’s reading history

Follow these steps to view all the items in a patron’s reading history.

Note:
Patrons may view their own reading histories by accessing their patron accounts in the PAC.

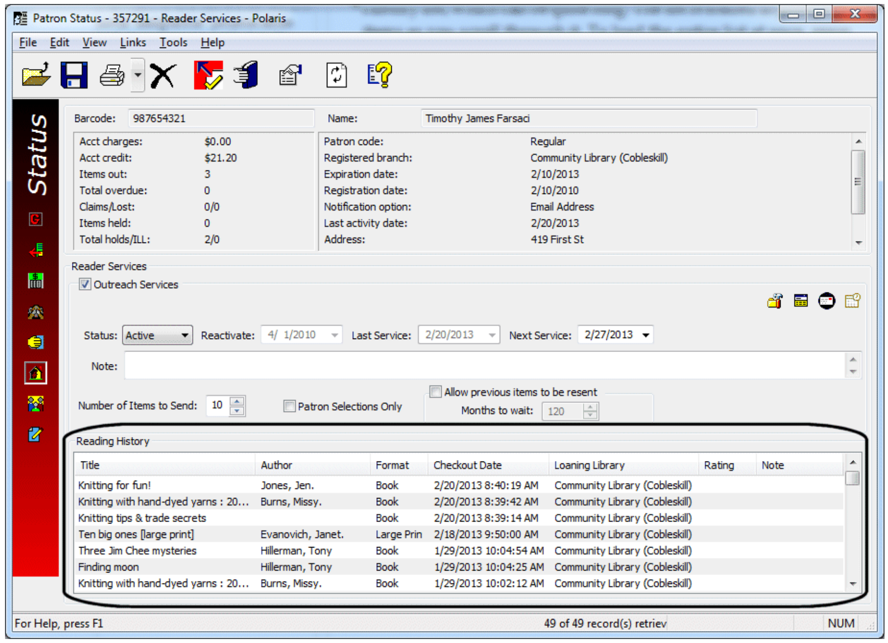
1. Select **Circulation, Patron Status** to find and open the patron’s record. See “Find patron services and related records” on page 14.

   The Patron Status workform - General view appears.

2. Select **View, Reader Services** or click  to display the Reader Services view.

   The items that the patron has checked out appear in the Reading History list, which can be quite long. The list is loaded in groups of 100 items as you scroll through it. To load the entire list at once, press **CTRL+ALT+A**.

Tip:
If an item in the list is a serial, the serial designation (enumeration and chronology) is added to the title. You may need to expand the title column to see the designation.



Note:
Outreach services options are available on this workform view only if your library's Polaris system specifically includes outreach services. See "Outreach Services Processing" on page 274.

Stop and clear a patron's reading history

If you stop recording a patron's reading history, the patron's current reading history is cleared as well. You cannot archive a reading history. Follow these steps to stop recording a patron's reading history and permanently clear the current history.

Note:
The history is also cleared if the patron stops it from PAC.

Tip:
From the Patron Status workform, press **F9** to open the Patron Registration workform.

1. Select **Patron Services, Patron Records** to find and open the patron's record. See "Find patron services and related records" on page 14.

   The Patron Registration workform - Addresses view appears.

2. Select **View, General** to display the General view.

3. Clear the **Maintain reading list** check box.

Important:
When you save the record, the patron's reading history is deleted and cannot be recovered.

4. Select **File, Save** to save the record.

   The Reading History list is cleared from the Patron Status workform - Reader Services view.

   > **Note:**
   > Reading histories are automatically kept for Outreach Services patrons. If your branch uses Outreach Services but has not enabled reading histories for non-Outreach Services patrons, when you remove a patron from outreach services by clearing the **Outreach Services** check box on the Patron Status workform - Reader Services view, the patron's reading history will not be cleared. The history remains unless items are manually removed. See "Remove items from a patron's reading history" on page 45.

Related Information

Stop all reading histories (non-outreach services patrons) - See "Setting Reading History Options" in the *Polaris Patron Services Administration Guide 4.1R2*.

Remove items from a patron's reading history

These separate Circulation permissions are necessary to remove individual items from the reading histories of non-outreach services patrons and outreach services patrons respectively:

- **Reading history: Remove non-ORS patron history entries: Allow**
- **Reading history: Remove ORS patron history entries: Allow**

You also need the permission **Patron Status: Modify reader services**. If you have the appropriate permissions, follow these steps to remove individual items from a patron's reading history.

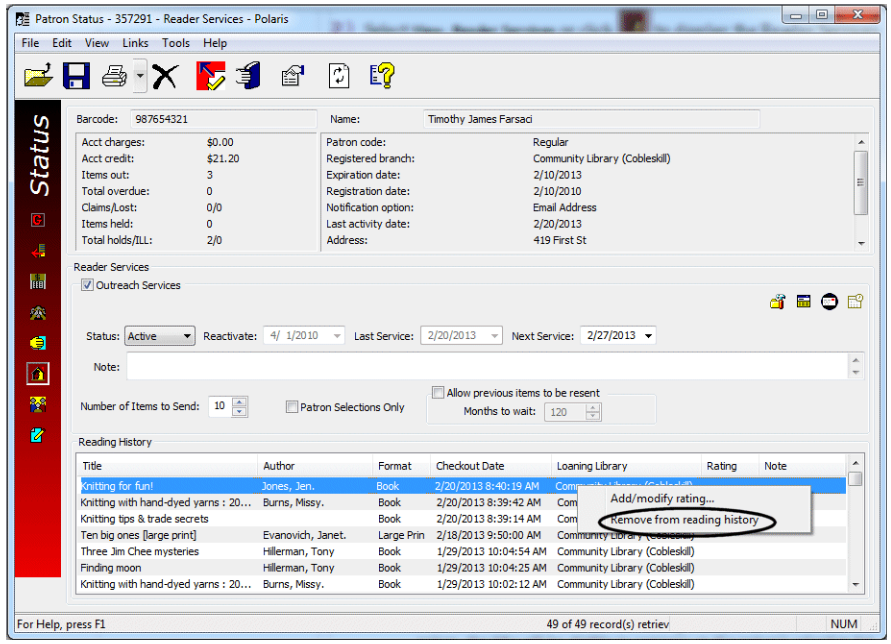
1. Select **Circulation, Patron Status** to find and open the patron's record. See "Find patron services and related records" on page 14.

   The Patron Status workform - General view appears.

2. Select **View, Reader Services** or click  to display the Reader Services view.

   The items that the patron has checked out appear in the Reading History list.

3. Right-click the title or titles in the Reading History list, and select **Remove from reading history** from the context menu.



Note:
When an item is removed from the reading history of an outreach services patron, the title will be eligible to reappear on the patron's selection list. At checkout, the message that warns you when the outreach services patron has already had the title does not appear.

4. Select **File, Save**.

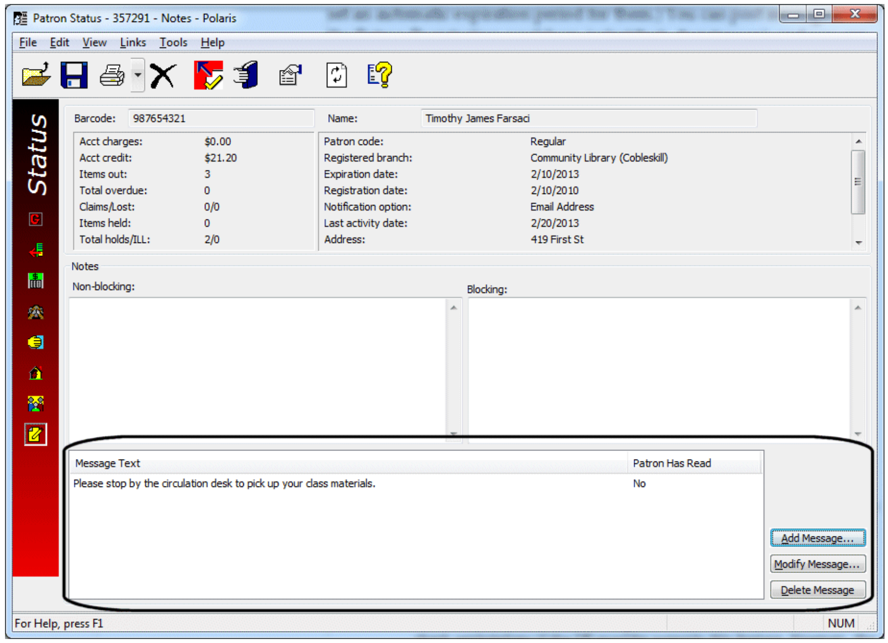
   The items are no longer displayed in the Patron Status workform or the PAC patron account.

Related Information

Reading histories in the PAC patron account - Your library may also allow patrons to view their reading histories from the PAC and start and stop the recording their histories. In Polaris Administration, the Patron Service profile **Patron can enable/disable reading history** controls this feature. A separate PAC profile, **Patron can remove reading history**, allows patrons to remove individual items from their histories.

Posting Patron Messages

With the appropriate permissions, you can post messages to specific patron accounts and later modify or delete the messages. (Your library may also set an automatic expiration period for them.) You can post messages from the Patron Registration workform (select **Tools, Post Message**), and you can post and manage them from the Patron Status workform - Notes view.



Patrons can read and delete their messages online from the PAC patron account. When a patron marks a message as read, the status of the message is also updated in the Patron Status workform - Notes view, and when a patron deletes a message, the message is also deleted from the Patron Status workform - Notes view.

Note:
Patrons can also view their messages in the patron account on SIP self-check workstations if the SIP provider supports this feature. However, the messages cannot be marked as read or deleted.

If a patron has unread messages, an alert message appears in the Patron Blocks dialog box during check-out. You can continue the check-out operation or cancel it, and you can also click the block text to open the Patron Status workform - Notes view. The alert message does not place any blocks on patron activity in the PAC.

Your library sets up predefined messages in Polaris Administration, translates them into Polaris PowerPAC licensed languages if necessary, and sets an automatic expiration period for them. For more information, see "Setting Up Patron Messages" in the *Polaris Patron Services*

Administration Guide 4.1R2.

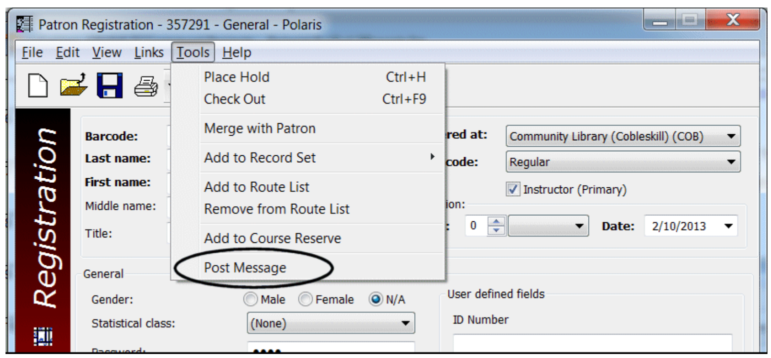
Post and manage patron messages

Follow these steps to post and manage messages in patron records.

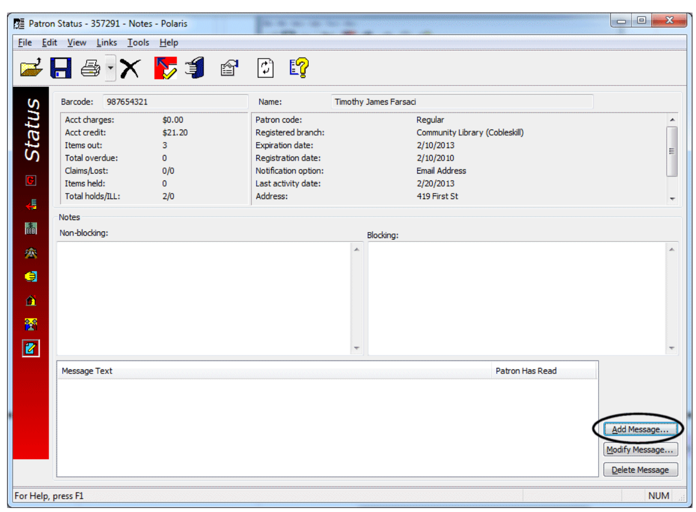
Note:
You need the system-level Circulation permission **Post patron message: Allow** to post and modify messages in a patron account. You need the permission **Delete patron message: Allow** to delete messages.

1. Find and open the patron record in the Patron Registration workform or Patron Status workform - Notes view. See “Finding Patron Records” on page 9.

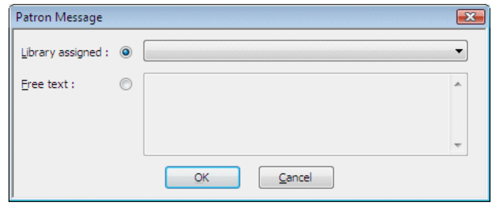
2. To open the message dialog box, use one of these methods:
   - To post a message from the Patron Registration workform, select **Tools, Post Message**.



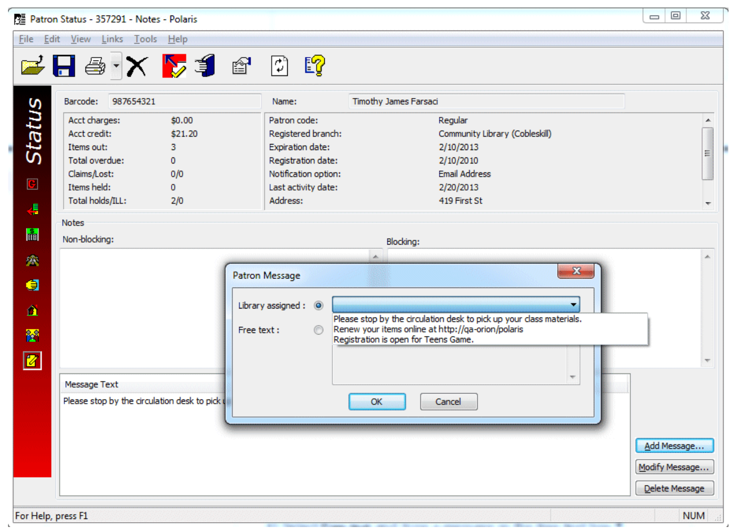
   - To post a message from the Patron Status workform - Notes view, click **Add Message** in the message area of this view.



The Patron Message dialog box opens.



3. To post a message, use one of these methods:
    - Select a **Library-assigned** message from the drop-down list. The message choices are those set in Polaris Administration for your log-on branch.



    - Select **Free text** and type a message in the free text box.

4. Click **OK**.

    The dialog box closes and the message is added to the **Message Text** column. The **Patron Has Read** column indicates whether the patron has marked the message as read in the PAC patron account.

    When the patron account has a message, the Notes icon on the Patron Status workform view bar is yellow (as for non-blocking notes). If the patron has both blocking notes and messages, the color is red. The blocking note color takes precedence.

5. To modify a message, select the message in the messages list and click **Modify Message**.

    The Patron Message dialog box opens.

    - If you selected a library-assigned message, you can select a different message from the drop-down list. Then click **OK**.
    - If you selected a free-text message, you can edit the text. Then click **OK**.

6. To delete a message or multiple messages, select them in the messages list and click **Delete Message.**

A confirmation message appears. Click **Yes** to delete the message or **No** to keep it.

7. Select **File**, **Save** to save your changes to the patron record.

Related Information

- **View message properties** - Right-click the message in the Patron Status workform - Notes view, and select **Properties** from the context menu. The Properties dialog box lists the creator's user name, workstation, branch, and the creation date and time. If the message has been modified, the modifier and modification date and time are listed.
- **Patrons with Messages Report** - This report provides a snapshot of read and unread messages currently in patron accounts. See "Patron Services Reports" in the *Polaris Basics Guide 4.1R2*.
- **Merging patron records** - If patron records are merged, messages attached to the secondary (losing) patron record are not copied to the primary record. See "Merging Patron Records" on page 59.
- **Managing patron messages in PAC** - See PAC online Help or the *Polaris PowerPAC Guide*.

Patron Associations

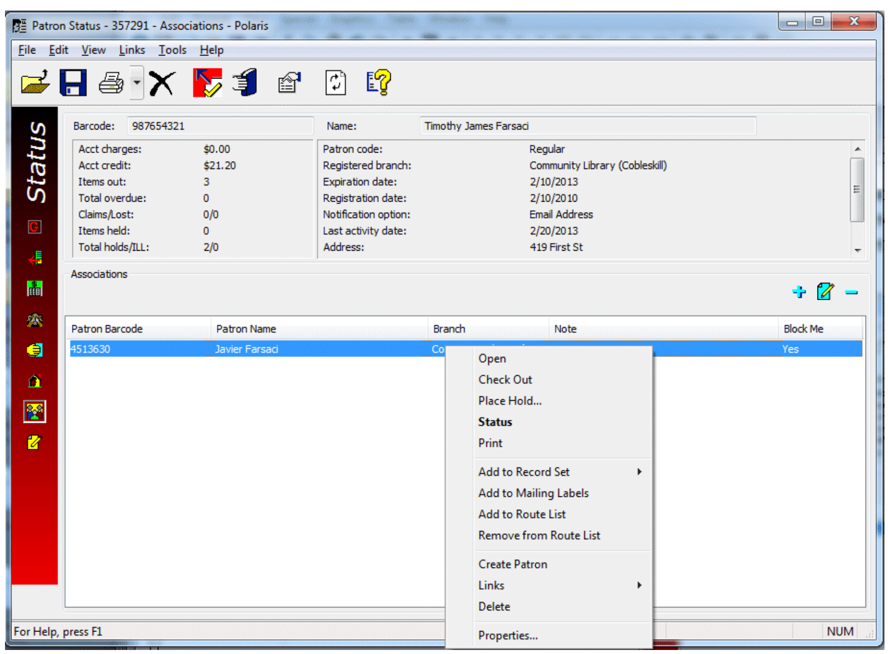
You can create associations between two or more patron records so that when one record is open, all records associated with it are conveniently accessible. For example, you might associate all members of a family, so when checking out items to parents, you can quickly renew items or pay fines for their children.

Your library sets the number of records with which patron record can be associated. However, if record A is associated with records B and C, then records B and C are automatically associated with record A, but records B and C are *not* automatically associated with each other. (You can manually associate records B and C.)

Important:
Associated patron records remain individual records. If a notice is generated for a single patron record, notices are *not* generated for associated records. For hold requests, items trap for the patron who made the request, *not* for associated patrons. However, it is possible to block a patron from checkout or renewal if an associated patron record is blocked. See "Associated Patron Blocking" on page 52.

From a patron record, you can access associated records in the following ways:

- **Patron Registration workform** - Select **Links, Associations**. If there is one associated record, the record opens. If there are more than one, a list opens. You can work with the associated records directly from the list.
- **Patron Status workform - Associations view** - Right-click an associated patron record. From the context menu, you can open the record or do circulation functions and other activities for the associated patron.



- **Find Tool results list** - Right-click a patron in the results list and select **Links, Associations** from the context menu. If there is one associated record, the record opens. If there are more than one, a list opens. You can work with the associated records directly from the list.

Associated Patron Blocking

When you create a new association for a patron (the parent or primary record), you can choose to block the parent or primary record at checkout and renewal when an associated secondary or child record is blocked at checkout.

- One primary record may be linked to multiple secondary records. If any of the secondary records are blocked, the primary record is blocked.
- One secondary record may be linked to multiple primary records. If the secondary record is blocked, all the linked primary records are blocked.
- Two primary records (Mom and Dad) may be linked to each other. If either is blocked, the other is blocked. Furthermore, a son may be linked to both Mom and Dad. Since all records are directly linked, if one is blocked, all will be blocked.
- Block checking is only one level deep. For example, instructor A and instructor C are both linked to student B. If B is blocked, A and C will both be blocked, because they each are one link away from B. But A will not be blocked if C is blocked because A is not directly linked to C.

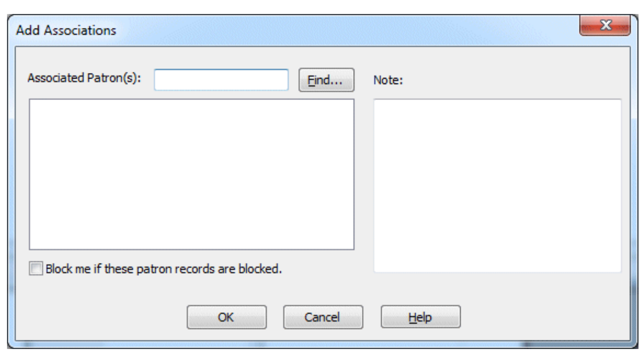
Create and edit patron associations

Follow these steps to create and edit an association between patron records.

1. Display the patron's record in the Patron Status workform. See "Find patron services and related records" on page 14.

2. Select **View, Associations** or click to display the Associations view.

3. Click or press **CTRL+A** to display the Add Associations dialog box.



4. Enter the barcode of the patron with whom you want to create an association, using one of these methods:
   - Scan the barcode from the patron's library card, or type the barcode in the **Associated Patron(s)** box, and press **ENTER**.
   - If you do not have the patron's library card, click **Find** to display the Polaris Find Tool and search for the patron's record. Right-click the record in the results list and choose **Select** from the context menu. See "Find patron services and related records" on page 14.

   The patron's barcode appears in the **Associated Patron(s)** box.

5. If you want to add more associations to the record, repeat the previous step until all the patron barcodes have been entered.

6. If you want to enter a note, type the text in the **Note** box.

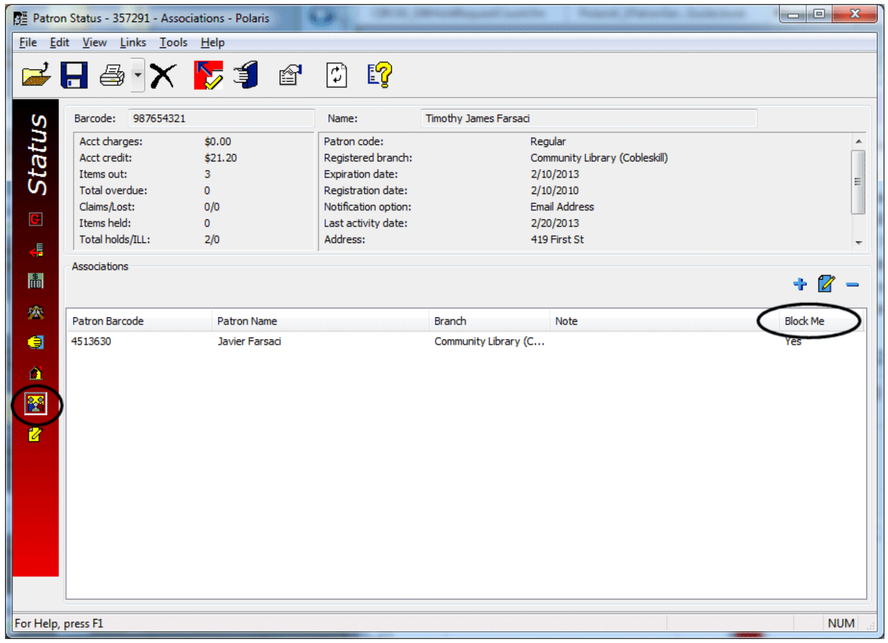
   Important:
   Make sure that your note is clear, because the same text appears on both records. For example, "Mother" is an ambiguous note because it appears on both the parent's record and the child's record. "Jane Patron is the mother" is a clearer note. If you are creating multiple associations at the same time, the same note is added to all the associations.

7. Select (check) **Block me** if you want to block this record at checkout or renewal when any of the associated records are blocked. The "me" in "Block me" refers to the record you have open and are adding the associations to.

   Note:
   If you want the block to work both ways - that is, Patron A is blocked when Patron B is blocked, and Patron B is blocked when Patron A is blocked - set up the association with Patron B from Patron A's record and check **Block me** as described here. Then open Patron B's record, select Patron A in the Associations list, and click  to edit the association with Patron A, checking **Block me**.

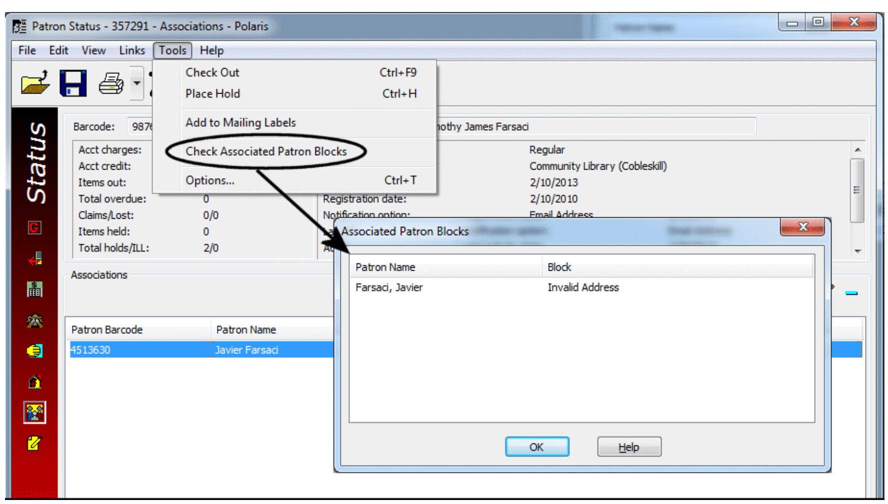
8. Click **OK** to save your settings.

   The Associations view appears with the additional patrons in the Associations list. The association with this record appears in the Associations view of all the patron records you added as associations. When a patron record has associated records, the Associations view icon on the Patron Status workform changes from a gray background to yellow. If the patron has a blocking relationship with any of the associated patron records, this is noted in the Block Me column.



9. To check an associated patron's blocks from the Patron Status workform, select **Tools, Check Associated Patron Blocks**.

   A dialog box displays a list of blocks on the associated patron records. You can double-click any block to open the appropriate Patron Status workform view for the associated patron record.



Related Information

- **Edit association notes or block settings** - Select the patron association that you want to edit in the Associations list, and click  (or press **CTRL+E**) to display the Edit Association dialog box. You can edit any text in the **Note** box, and/or change the **Block me** setting. If you edit the note, your changes appears in the Associations view of both the primary and associated patron records.
- **Delete an association** - When you delete an association, you are deleting the relationship between the two records, not the records themselves. Select the patron association or associations that you want to delete in the Associations list, and click (or press **CTRL+D**). The association no longer appears in the Associations list.
- **Associated Patron Groups Report** - The toolbar report Associated Patron Groups lists all patron records that are linked in associations (whether or not these are blocking relationships). In the Polaris Reports Manager, select **Public Services, Patron Services** to access the report. For details, see “Using Polaris Standard Reports” in the *Polaris Basics Guide 4.1R2*.

Deleting Patron Records

When you delete a patron record, you permanently remove the record from the Polaris database. (A deleted record *cannot* be recovered.) Patron records can be deleted manually or automatically, as well as individually or as a group. Automatic deletion occurs overnight, when the system finds and deletes patron records that have been inactive for a period of time as specified by your library in Polaris Administration. See "Setting Options for Deleting Patron Records" in the *Polaris Patron Services Administration Guide 4.1R2*. Manual deletions require the appropriate permissions for the patron's registered branch. See "Working with Patron Accounts" in the *Polaris Patron Services Administration Guide 4.1R2*.

Important:
If you do not want a patron record to be deleted under any circumstances, select the **Do not delete patron record** check box on the Patron Registration workform - General view.

Blocks to Deleting Records

A patron record may be blocked from deletion under certain conditions. Some blocks occur because a condition defined in Polaris Administration is met. See "Set blocks for patron record deletion" in the *Polaris Patron Services Administration Guide 4.1R2*. Other blocks are due to circulation processes, linked records, and system-assigned blocks. When you attempt to delete a patron record, detailed messages inform you if there are blocks to deletion.

You can override these types of blocks if you have the permission **Patron registration: Override blocks to delete** for the patron's registered branch:

- **Patron record** - Library assigned block, free text block, patron note, associated patron records, link to a routing list, verify patron data block
- **Patron account** - Recent charge, amount due, credit, deposit

Some types of blocks prevent record deletion until the blocking condition is corrected. For example, if you attempt to delete a patron record that is associated with another patron record, a message is displayed, but you can continue to delete the record. However, if you attempt to delete a patron record that is linked to a hold request with a Held or Shipped status or an interlibrary loan request with a Received status, you must cancel the record deletion.

Delete a patron record manually

Follow these steps to remove a patron record from the Polaris database permanently.

Note:
You need appropriate permissions for the patron's registered branch to delete a patron record, because patron records are owned by the registered branch. For the list of permissions needed, see "Working with Patron Accounts" in the *Polaris Patron Services Administration Guide 4.1R2*.

1. Display the patron's record in the Patron Registration workform or Patron Status workform. See "Find patron services and related records" on page 14.

   Note:
   You can delete a patron record from the Find Tool results list. Right-click the record, and select **Delete** from the context menu. You can also delete a patron record from the Record Set workform. Select the record, then select **Tools, Delete**.

2. Select **File, Delete**.

   A message asks if you are sure you want to permanently delete the patron record.

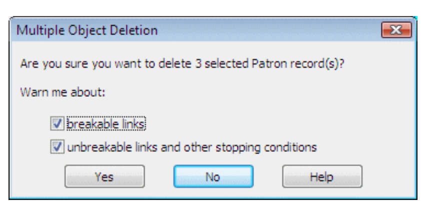
   Important:
   Doing the next step erases the barcode, password, name, address, e-mail address, and user-defined fields from the patron record, and the record does not appear in Find Tool search results; then it is permanently deleted during nightly processing. The record cannot be recovered.

3. Click **Yes** to confirm that you want to delete the record.

   The workform closes.

Related Information

- **Deleting multiple patron records** - If you have selected multiple patron records for deletion (for example, from a Find Tool results list), the confirmation message includes options for suppressing multiple warning messages regarding breakable and unbreakable links and other stopping conditions. If you have the permission **Suppress warnings for breakable links when deleting multiple patron records**, you can clear the **Warn me about breakable links** checkbox. If you have the permission **Suppress warnings for unbreakable links, and other stopping conditions, when deleting multiple patron records**, you can clear the **Warn me about unbreakable links and other stopping conditions** checkbox. If you select this option, all the records with unbreakable links are skipped and are not deleted, but you do not receive a warning.



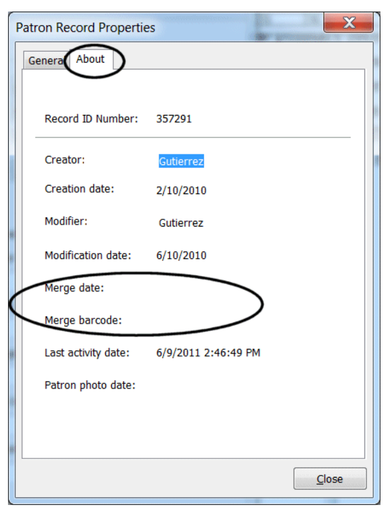
- **Links** - The Patron Record Links dialog box may appear during the deletion process if you are deleting a single record or if you do not suppress warning messages for multiple records. Click **Continue Deleting** to continue deleting the patron record, despite the links. Click **Cancel Deletion** to stop deleting the patron record. If the dialog box lists certain links as "unbreakable," you cannot override them, and you must cancel the deletion. See "Blocks to Deleting Records" on page 56.
- **Polaris Fusion** - Some information related to patron purchases of digital material is retained if your library has Polaris Fusion and you accept credit card payments through PayPal Payflow Pro. If the patron record is deleted for a patron who has been granted access and has a Fusion shopping cart, the information related to Polaris Fusion is still available for reporting purposes.

Merging Patron Records

Two records may exist for the same patron. For example, a patron may have a record under a new name but still have a record under a former name. You can merge the patron records to resolve the issue.

Note:
You need the system-level Circulation permission **Merge patrons: Allow** to merge patron records, a job typically handled by a supervisor, as well as permission to modify patron records for the patron's registered branch in the primary record.

To merge the records, you find and open the primary record (the record that will retain the data) and the secondary record to be merged with the primary record. The records can belong to different registration branches. The program combines information from both records. Patron registration information (patron code, registered branch, address, notification options, stat class, UDF values, and so forth) from the primary record is retained. Patron transaction summary information (such as items out, fines, holds, associations) is copied from the secondary record to the primary record. For details, see "Effects on Patron Record Information" on page 60. When the records are merged, the secondary record is deleted. The date of the merge and the barcode from the deleted record appear on the **About** tabbed page of the primary record's property sheet.



Blocks to Merging Records

Certain conditions block the merge:

- The **Do not delete** option is checked in the secondary record.
- The primary or secondary record has a collection agency block.
- The secondary record has Held or Shipped hold requests. The message indicates that the holds must be cleared before merging.
- The secondary record has ILL requests of any status. The message indicates that the requests must be cleared before merging.
- The secondary record is linked to a course reserve record. The message indicates that the patron record must be removed from all linked courses.

Effects on Patron Record Information

When the merge is successful, the records are affected as follows:

- **Registration Data** - The primary record's registration data (address, photo, and UDF values) remain. The secondary record's exemptions, preferences, photo, and UDF values are *not* copied to the merged record.
- **Barcode** - The patron barcode in the primary record does not change. The secondary record barcode appears in the **Former barcode** field of the primary record.
- **Patron Code** - The patron code in the primary record does not change.
- **Last Activity Date** - The most recent Last Activity Date, regardless of record, is used in the merged record. Last Activity Date is updated by the following activities:
    - **Payments made within the staff client** - All methods of payment (cash, check, or credit card) update the last activity date.
    - **Credit card payments made via third party software** - When a payment is taken, including payments made via CIP, the last activity date is updated on the patron record. If the payment process fails or the payment is not accepted, the date will not be updated.
    - **Waives** - If a charge was waived on the patron account, the date will be updated.
    - **Payments made from ExpressCheck, PAC, and Mobile PAC** - When the patron logs in to ExpressCheck, PAC, or Mobile PAC and makes a payment, the last activity date is updated.
- **Date of Original Registration** - The earliest Date of Original Registration, regardless of record, is used in the merged record.
- **YTD and Lifetime Use** - The YTD use and lifetime use counts of the secondary record are added to the counts for the primary record.
- **Blocks**

   - If the secondary record has a Verify Patron Data block, the block is ignored. If the primary record has a Verify Patron Data block, the block is retained. The block displays when the merged record is saved.
   - All free text blocks are copied from the secondary record to the primary record.
   - Library-assigned blocks are copied from the secondary record to the primary record. If there are duplicates, the blocks in the primary record are retained.
- **Items Out** - Copied to the primary record.

  Note:
  In the linked item records, the **Current borrower** field is updated to the primary record, and the **Last borrower** field is updated to the secondary record. All other item data remains unchanged.
- **Notice history** - The secondary notice history is added to the primary record.
- **Claimed items** - The secondary claimed item information is added to the primary record, and the current claim and/or lifetime claim count is updated in the primary record.
- **Lost items** - The secondary lost item information is added to the primary record, and the current lost item count is updated.
- **Patron account** - The secondary record's current charges, payments, and credit transactions are copied to the primary record, and the total charge, payment, and credit amounts are updated. All account summary transactions are also copied.
- **Hold requests** - If the secondary record has any attached hold requests with a status of Active, Inactive, Pending, Cancelled, or Not-supplied, the hold request is updated with the primary patron information, and the requests are added to the Holds view of the primary patron record. The requests maintain their queue positions, but the patron record linked to the request changes to the primary record.

  Note:
  If there are *duplicate* Inactive, Active, or Pending hold requests, the older one is retained and the other is canceled. A note is added to the canceled request.
- **Associations** - The primary record retains any associations it already has, but is not affected by any associations in the secondary record.
- **Patron messages** - Messages attached to the secondary record are not copied to the primary record.
- **Reading history** - The secondary reading history and any ratings (from Outreach Services patrons) are copied to the primary record, and the items are sorted by check-out date. Duplicate titles are not deleted.
- **Outreach services (ORS)** - ORS information from the secondary record (profile, delivery options, saved selection or pick lists, notes) is not copied to the primary record. If the Outreach Services option is checked in the secondary record, a message advises that the ORS profile of the secondary record will be lost. You can continue or cancel the merge.

- **Notes** - Secondary blocking and non-blocking notes are copied to the primary record. A blank line separates the copied notes and any existing notes in the primary record. The system adds the following note to the top of the primary record's **Non-blocking note** field: **Patron record was merged with [barcode], on [date]. The secondary record has been deleted.**
- **Notices** - Overdue notices initiated for the secondary record will be sent to the primary record in sequence. For example, if the secondary record received a first overdue notice before the merge, the primary record will receive the second overdue notice after the merge. If the secondary record exceeded the fine notice or collection agency threshold before the merge, the primary record will receive the notice after the merge.

  Note:
  If a hold request was associated with the secondary record and trapped for the secondary record, the notice will go to the secondary record because the records cannot be merged in this case. See "Blocks to Merging Records" on page 60.

- **Mailing labels** - If the secondary name and address are stored in the Mailing Label Manager, they are removed after the merge.
- **Record sets** - If the secondary record is a member of a record set, the record is removed from the record set after the merge. The primary record does not become a member of the record set.
- **Route lists** - Secondary membership is copied to the primary record.
- **Polaris Fusion access and shopping carts** - If your library offers Polaris Fusion e-commerce (the ability to purchase digital materials from the PAC with a credit card) and the secondary patron record has been granted access and has a shopping cart, the access permission and shopping cart are copied to the primary patron record.

Effects on the Transactions Database

When records are merged, a Modify Patron record transaction is created for the primary record. Older transactions involving the secondary record are not modified, so they are still available for reporting.

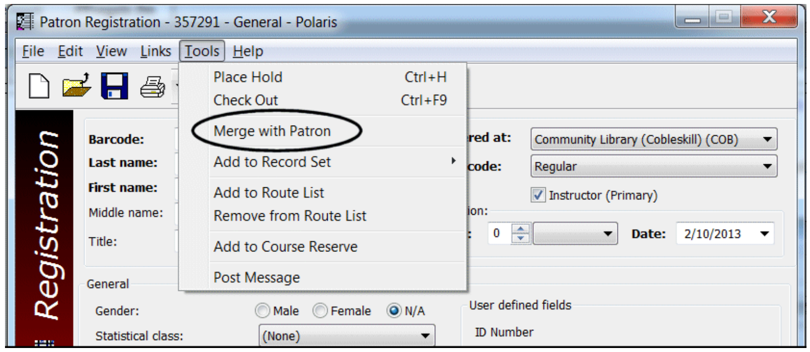
Merge patron records

Follow these steps to merge two patron records.

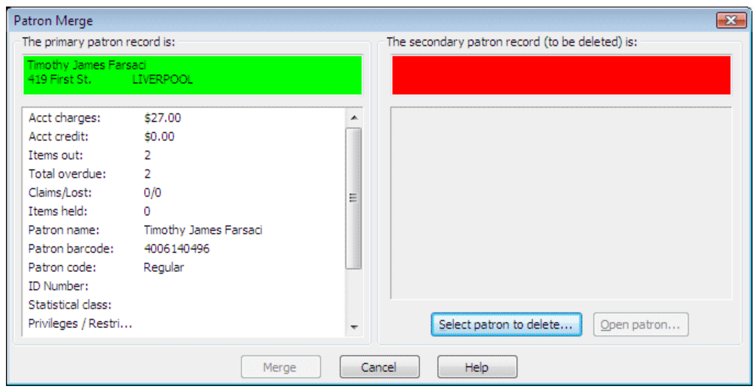
Note:
You need the system-level Circulation permission **Merge patrons: Allow** to do this procedure, as well as permission to modify patron records for the patron's registered branch in the primary record.

1. Display the primary patron record (the record you want to keep) in the Patron Registration workform. See "Find patron services and related records" on page 14.

2. On the Patron Registration workform, select **Tools, Merge with Patron**.



The Patron Merge dialog box opens.



3. Click **Select patron to delete**.

   The Polaris Find Tool opens.

4. Search for the secondary patron record.

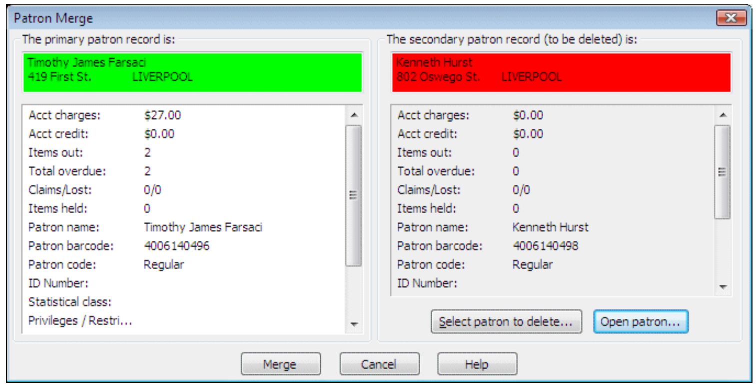
   This is the record that contains the information you want to transfer to the primary record. When the merge is complete, the secondary record will be deleted.

5. In the Find Tool results list, right-click the secondary patron record and choose **Select** from the context menu.

Note:
If the selected record cannot be merged, a message appears. See "Blocks to Merging Records" on page 60 for details.

Tip:
When the secondary record information is displayed in the Patron Merge dialog box, you can click **Open** to view the record.

If there are no blocks to merging the records, the Find Tool closes. Information from the record you selected is listed in the secondary patron record section of the Patron Merge dialog box.



6. Click **Merge** to merge the records.

The secondary patron record is deleted, and information is transferred to the primary record. See "Effects on Patron Record Information" on page 60 for details.

7. Select **File, Save** or click  to save the primary record.

Creating Patron Mailing Labels

With the Polaris Mailing Label Manager you can print patron mailing labels on Avery® 5161, Avery 5163, or Avery 5262 sheet labels, or export the addresses to another application, such as a word-processing application with mail merge or a shipping label application. The Mailing Label Manager collects the addresses as a set that you can save and export as a .csv file, the comma-delimited format accepted by most mail-merge and label programs.

The Mailing Label Manager uses dynamic font sizing to print Avery sheet labels. By default, labels are printed in 14 point Arial. If a label contains a line with more than 28 characters, the font size is automatically changed to 10 points, which allows approximately 40 characters per line.

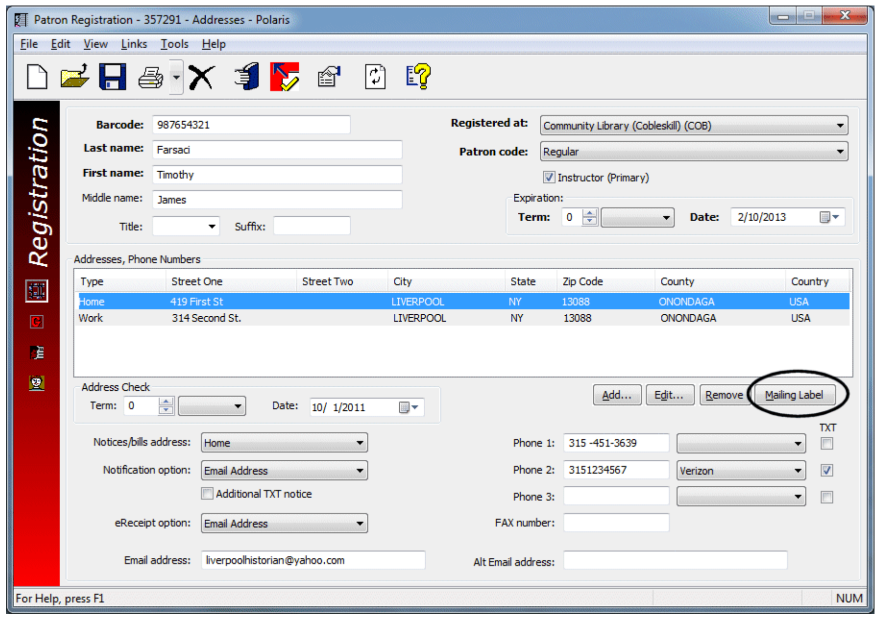
When the 10-point font is used and a line still exceeds about 40 characters, the following rules are applied:

- The city/state/Zip code line is never truncated.
- Avery 5161 (4” x 1”) - Street 1 may use two lines. Other lines may be truncated.
- Avery 5262 (4” x 1.33”) - Street 1 and Name may use two lines. Other lines may be truncated.
- Avery 5163 (4” x 2”) - All fields may use 2 lines.

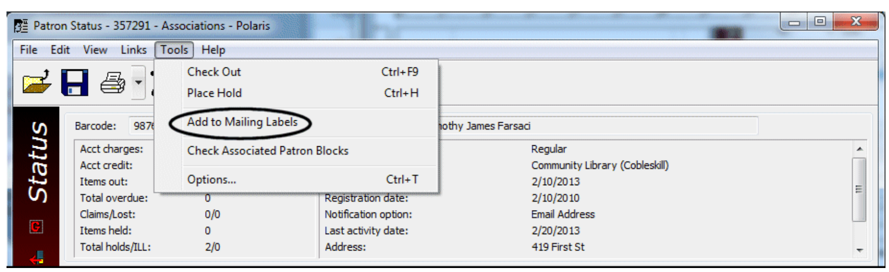
Generate patron mailing labels

Follow these steps to create a set of patron addresses, then print or export the set for mailing labels.

1. Add patron addresses to the address set using one of these methods:
   - On the Patron Registration workform - Addresses View, select the address and click **Mailing Label** (or right-click the address and select Mailing Label from the context menu).



   - On the Patron Status workform, select **Tools, Add to Mailing Labels**.

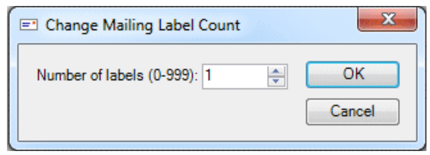


   - In a Find Tool results list of patron records, right-click the patron line item and select **Add to Mailing Labels** from the context menu.
   - In the Patron Record Set workform, right-click the patron line item and select **Add to Mailing Labels** from the context menu. To add all the patrons in the record set, select **Edit, Select All** or press **CTRL+A**. Then right-click in the list of patron records and select **Add to Mailing Labels** from the context menu. For more information about record sets, see "Creating and Using Record Sets" in the *Polaris Basics Guide 4.1R2*.

If a patron record contains multiple addresses, the Patron Addresses dialog box appears. Select the address in the list and click **OK**.

> **Note:**
> You can also add addresses to the set from the Mailing Label Manager workform. See step 3.

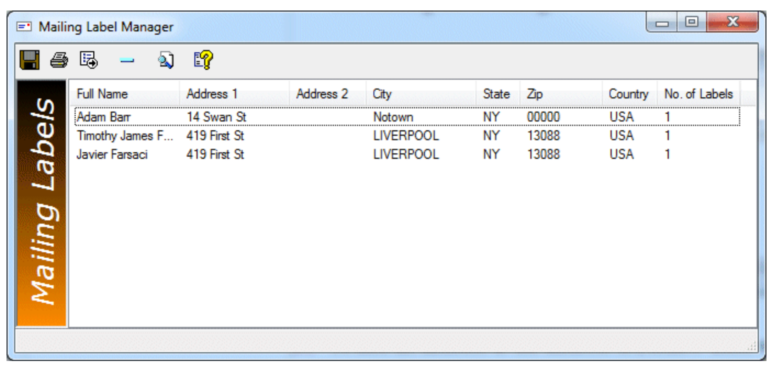
If the patron and address are already entered in the Mailing Label Manager, a message asks if you would like to produce more than one label for this patron and address. If you click **Yes**, the Change Mailing Label Count dialog box opens and you can set the number of labels to produce.



The status bar displays the message **Patron address added to mailing label manager**.

2. On the Polaris Shortcut bar, select **Utilities, Mailing Label Manager.**

   The Mailing Label Manager workform opens. Existing entries are sorted by last name. New entries are placed at the bottom of the list, but the list is resorted when you close and re-open the workform.



3. To add an address to the address set, follow these steps:

   a) Click  on the toolbar, and use the Find Tool to search for the patron record.

   b) Right-click the record in the results list, and choose **Select** from the context menu.

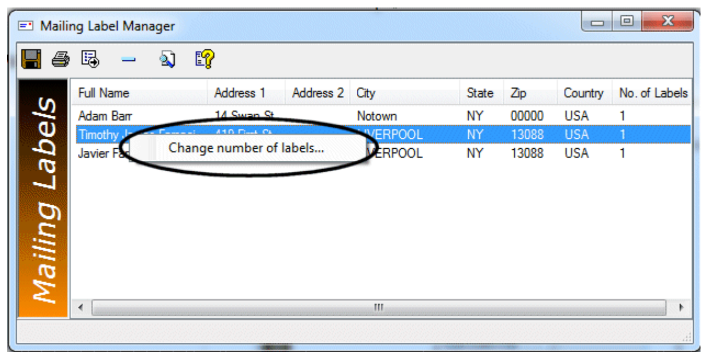
   If the record contains only one address, the address is added to the set. If the record contains multiple addresses, the Patron Addresses dialog box appears. Select the address in the list and click **OK**.

If the patron and address are already entered in the Mailing Label Manager, a message asks if you would like to produce more than one label for this patron and address. If you click **Yes**, the Change Mailing Label Count dialog box opens and you can set the number of labels to produce.

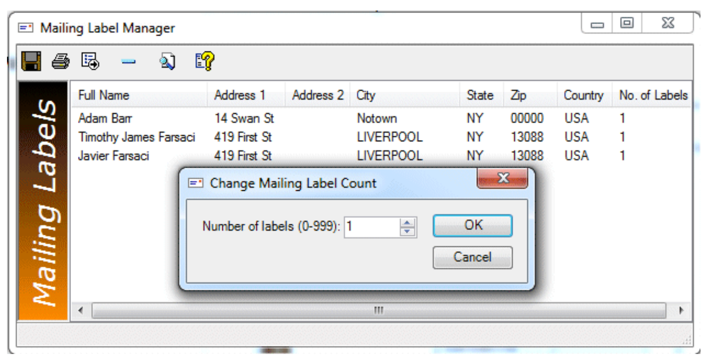
4. To remove an address from the address set, select the address in the list and click on the toolbar.

5. To change the number of labels to produce for a patron and address, follow these steps:

   a) Right-click the patron address and select **Change number of labels**.

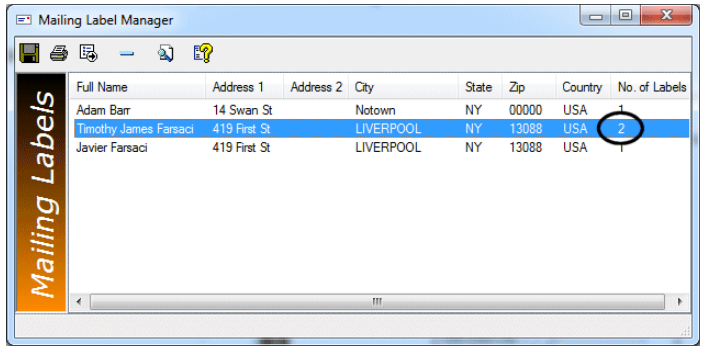


The Change Mailing Label Count dialog box opens.



   b) Set the number of labels and click **OK**.

   The **No. of Labels** column is updated, and the indicated number of labels will be produced for this patron and address after you save your changes.



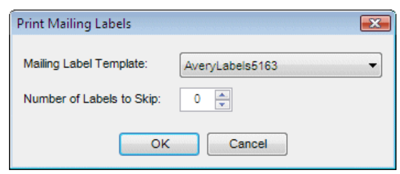
6. To print the address set on labels, follow these steps:

> **Important:**
> If you updated the number of labels to produce for a patron, you must click the Save icon before printing the labels.

a) Load the appropriate label stock in your default workstation printer.

b) Select **File, Print** from the Mailing Label Manager menu bar, or click the print icon on the toolbar.

The Print Mailing Labels dialog box opens.



c) Select the label type in the Mailing Label Template box:

- Avery 5161 labels are 4 inches x 1 inch.
- Avery 5262 labels are 4 inches x 1.33 inches.
- Avery 5163 labels are 4 inches x 2 inches.

d) If necessary, type or select the number of labels to skip. (Use this option to print on a partially used sheet of labels.)

e) Click **OK**.

The labels are displayed as an Adobe .pdf file.

f) Click the Adobe print icon.

The Print dialog box opens.

g) Set **Page Scaling** to **None** and select (check) **Auto-Rotate and Center**.

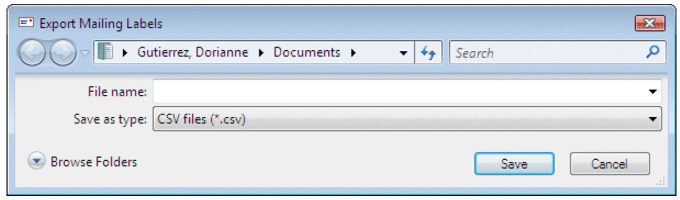
h) Click **OK**.

The labels are printed.

7. To export the address set for use by another application, follow these steps:

   a) Click  on the toolbar.

   The Export Mailing Labels dialog box appears.



   b) Browse to the location where you want to save the exported file.

   Choose a location that is available to your mailing label program.

   c) Type a filename for the file, leaving the **Save as type** box set to **CSV files**.

   d) Click **Save**.

   The file is saved, and the Export Mailing Labels dialog box closes.

8. If you want to save the set in the Mailing Label Manager so that it is displayed the next time you open the workform, click  on the toolbar.

Patron Registration Reports

Patron Services reports can help you gather statistics about the patrons registered in your system and at specific branches. For example, you can report how many patrons registered during a specific time period at a specific branch. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Patron Services** in the Polaris Reports dialog box.

- For information on generating reports, see "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*.
- For detailed descriptions of specific reports, see "Patron Services Reports" in the *Polaris Basics Guide 4.1R2*.

Bulk-Changing Patron Records

You can group patron records that need a common task or have a common condition into record sets. For detailed information about creating record sets, see "Creating and Using Record Sets" in the *Polaris Basics Guide 4.1R2*. With bulk change, you can make the same changes to all the patron records in a record set in one step, in real time (not as part of overnight processing).

Example:
Your library decides to place a longer expiration term on the accounts of volunteers. You can search for patron records by the **Volunteer** patron code, place all the records in the results list in a record set, and change the expiration term on all the records at once with bulk change.

You can make bulk changes to most fields on the Patron Registration workform, as well as the free-text and library-assigned blocks and notes fields on the Patron Status workform. More than one field may be changed in a single bulk change operation. You specify what changes to make to the selected fields, and the same changes are applied to the selected fields in all the records in the record set. For more information about patron record fields, see "Creating and Editing Patron Records" on page 18.

Bulk Changes to User-Defined Fields

Your library specifies the user-defined fields (UDFs) for patron records in Polaris Administration. These information fields are displayed on the Patron Registration workform - General view. They may be free-text fields or menus of predefined options.

When you apply bulk changes to free-text UDFs, the text is treated as a single unit. The whole text string can be deleted, replaced, or added, but you cannot replace parts of a text string. Bulk change affects only a free-text UDF's text string, not a UDF's definition. You can choose from the following actions:

- **Add** - Input text in *blank* UDFs.
- **Overwrite** - Replaces the existing text in UDFs with new text, and adds the new text to any blank UDFs.
- **Replace** - Replace the existing text in UDFs with new text. The new text is *not* added to any blank UDFs.
- **Delete** - Delete the text in UDFs. You can only delete an entire text string, and you must specify this entire text string.
- **Clear** - Delete the text in all UDFs, no matter what the text is.

For drop-menu UDFs, you can choose from the following actions:

- **Add** - Add the value only to *blank* UDFs.
- **Overwrite** - Replaces the existing value in UDFs with the new value, and adds the new value to any blank UDFs.
- **Delete** - Delete the selected value from UDFs.
- **Clear** - Delete all values from the selected UDF, no matter what the value is.

Note:
Because drop-menu options are branch-specific, if you select a value that is not valid for a selected Assigned Branch, the value is not changed and an error message is stored in the bulk change log file. See "View the Bulk Change Report" on page 77.

Bulk Changes to Blocks

The text of each library-assigned block is set in Polaris Administration; the text of each free-text block is manually entered when you create the block. Although records may have multiple blocks, you can change only one library-assigned block and one free-text block per bulk-change process. You can choose from the following actions:

- **Add** - Add a block to each record.
- **Delete** - Delete a block from each record. For free-text blocks, you must type the entire text string in the **Text to delete** box.
- **Replace** - For free-text blocks only, replace the existing text of the block with new text. You must type the entire existing text string in the **Find** box.

For library-assigned blocks, you must first choose a registration branch, because these blocks are branch-specific. If a patron has a library-assigned block that is not valid for the new branch, the block is removed from the patron record.

Note:
Blocks are displayed on the Patron Status workform - General view. See "Patron Services Records" on page 5. For information about working with individual patron record blocks, see "Working with Blocks (Stops)" on page 116.

Bulk Changes to eReceipt Options

You can set eReceipt options in bulk for a patron record set. The Bulk Change dialog box - General tabbed page includes a setting for **eReceipt option**. You can select **None** (default), **E-mail**, **TXT**, or **All**. The system changes a record in the record set if that change would be allowed for a single record. For example, if a branch has not enabled eReceipits, the bulk change does not affect records from that branch and an error is written to the bulk change report. If a branch has enabled one type of eReceipt but not both, no change is made for the receipt type that is not enabled. But in this case, if **All** is selected for bulk change, the system does set a record to the supported eReceipt type. For more information about setting eReceipt options for patrons, see "Add notification data to a patron record" on page 27. For more information about setting up eReceipts, see "Setting Up eReceipts" in the *Polaris Patron Services Administration Guide 4.1R2*.

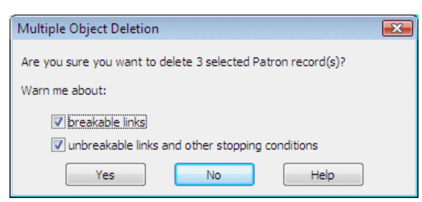
Bulk Changes to Notes

The Patron Status workform - Notes view includes two notes fields, one for non-blocking notes and one for blocking notes (those that block circulation). Each can contain one or more text strings, but each is a single field. You cannot bulk-change specific text within the field. When you bulk-change either note field, you can choose from the following actions:

- **Append** - Add text to the end of an existing note in each record.
- **Prepend** - Add text to the beginning of an existing note in each record.
- **Clear** - Delete the entire note.

Deleting Multiple Patron Records

You can select multiple patron records in the Record Set workform and delete them. Warning messages normally appear each time the system encounters a record with a breakable or unbreakable link during the deletion process. The deletion confirmation message includes options for suppressing these multiple warning messages. If you have the permission **Suppress warnings for breakable links when deleting multiple patron records**, you can clear the **Warn me about breakable links** checkbox. If you have the permission **Suppress warnings for unbreakable links, and other stopping conditions, when deleting multiple patron records**, you can clear the **Warn me about unbreakable links and other stopping conditions** checkbox.



For more information about setting the blocks that prevent patron record deletion, "Setting Options for Deleting Patron Records" in the *Polaris Patron Services Administration Guide 4.1R2*.

Bulk Change Reporting

When you bulk change records, the Bulk Change Report is automatically generated. It contains information about the number of records processed and the errors, if any, that occurred during the process. See "View the Bulk Change Report" on page 77.

You can also choose to have the bulk change process create an error record set containing the records that were not changed for some reason during processing. For example, if a record is locked by another user, it cannot be changed. The bulk change process makes a second attempt to change the item after completing the changes to the remaining records in the record set. If the second attempt to change the record fails, no further attempts are made. The record is added to the error record set and an error message is added to the Bulk Change Report log.

Bulk change patron records

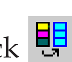
Follow these steps to edit all the patron records in a record set through bulk change.

Important:
You need the system-level permission **Access patron record bulk change** and the branch-level permission **Patron registration: Modify** to do this procedure. If the patron records in the record set have various **Registered at** branches and you do not have permission to modify the records for a specific branch, these records will not be changed and an appropriate error message will be written in the Bulk Change Report.

After the records are changed, they *cannot* be changed back to their original settings automatically.

1. Display a record set in the Record Set workform by one of the following methods:
   - Create a new record set. See "Creating and Using Record Sets" in the *Polaris Basics Guide 4.1R2*.
   - Select **Patron Services, Record Sets**. Use the Find Tool to search for an existing record set, and open it from the results list.
   - Select **Links, Existing, Records Sets** from an open patron record workform when the record is a member of the record set.

   The Record Set workform appears.

2. Select **Tools, Bulk Change** or click  to display the Bulk Change dialog box.
3. Click **Report/Record Set** to display the Report/Record Set tabbed page.
4. If you want to change the default destination for the bulk change report, type the folder and file name in the **Save to file** box, or click **Browse...** to locate a destination.

5. If you want to create an error record set, do these steps:

   a) Select the **Error Record Set** check box.

   b) Type a name for the error record set in the **Name** box.

   c) Type your user name or the library name as the owner of the error record set in the **Owner** box.

   Note:
   The error record set lists records that were not changed during processing due to errors. See "Bulk Change Reporting" on page 75.

6. Click the tab for the page that contains the field you want to change. The tabbed pages correspond to areas on the Patron Registration and Patron Status workforms:

   - **Registration** - Account information such as registered branch, expiration term and date, patron code, and statistical class

     Note:
     Statistical class codes are branch-specific. If you change the registered branch and a patron's statistical class code does not exist for the new branch, the statistical class code is changed to null.

   - **Address** - Address and notification options.
   - **General** - General information fields such as original registration date, eReceipt options, language, reading history, exclusion from overdue notices or collection agency reporting, additional text messaging, and "do not delete patron record."
   - **UDFs** - User-defined fields, as set up in Polaris Administration; see "Bulk Changes to User-Defined Fields" on page 72.
   - **Blocks/Notes** - Library-defined and free text blocks; patron record blocking and non-blocking notes. See "Bulk Changes to Blocks" on page 73 and "Bulk Changes to Notes" on page 74.

     Note:
     If you are changing library-assigned blocks, you must first choose a registration branch on the Registration tabbed page, because library-assigned blocks are branch-specific. If a patron has a library-assigned block that is not valid for the new branch, the block is removed from the patron record.

   The appropriate tabbed page appears.

7. Select the check box for the field you want to change.

   The companion box becomes available.

8. Select or type the new value for the field in the companion box.

9. Repeat steps 6-8 for each record field you want to change.

10. Click **OK** to start the bulk change process.

    The Summary of Changes message box appears. The message box lists the settings you made for the bulk change.

11. Click **Continue** to confirm your bulk change settings.

    The bulk change process applies all your changes to the records in the record set. You can do other tasks in Polaris while the bulk changes are being made. A message box appears when the bulk change process is finished.

12. Click **OK** on the message box. The Record Set workform appears.

    When the bulk change process is complete, review the Bulk Change Report for any errors in the process. See “View the Bulk Change Report” on page 77.

View the Bulk Change Report

When the bulk change process finishes, Polaris creates a Bulk Change Report. The Error Details section of the report contains basic record information and the reason for each error, if any. If this section of the report is blank, there were no errors. Follow these steps to display the Bulk Change report in a text editor or word processor.

1. Wait for the bulk change process to complete.
2. Start your text editor or word processor application.
3. Navigate to the report file and folder you specified on the Bulk Change dialog box, and open the Bulk Change Report file that you want to view.

   You can print the report from your text editor or word processor application.

Circulation Workstations: Receipts, Sounds, Smart Cards

To get ready for circulation, set each circulation workstation for receipt printing, audio alerts, and 3M™ smart card use if appropriate. Typically, you will need to do these procedures only once for each workstation.

This unit covers the following topics:

- “Setting Up Receipt Printing from Workforms” on page 79
- “Setting Circulation Audio Signals” on page 86
- “Setting the Workstation for Smart Card Use” on page 88

Setting Up Receipt Printing from Workforms

For each circulation workstation, you specify which receipts and slips should print from specific workforms, whether to use a page or receipt printer, and which printer should be used. Polaris provides the following kinds of circulation receipts and slips:

- **Check-out/renewal receipts** list the items checked out or renewed for a patron. Check-out receipts can be printed from the Check Out workform; renewal receipts can be printed from the Check Out workform and the Patron Status workform - Items Out view. You can print check-out receipts automatically or optionally (with a prompt for staff to print the receipt). Receipts for renewal will be printed automatically if enabled for the work form. If you want renewal receipts to be optional, disable the check-out receipt option for the workform and print the items out list if a receipt is desired. See "Renew items from the Patron Status workform" on page 108. For additional information on printing receipts from the Check Out workform, refer to "Check out an item" on page 94. You can also set bulk check-out receipts to print from the Outreach Services Manager workform, if your library uses Polaris Outreach Services. Polaris Administration settings control the specific information that appears on the receipt, and your library may set an option to print a receipt only when the patron asks for one. See "Set check-out receipt options" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Check-in receipts** can be manually printed from the Check In workform, Normal and Bulk views. When a patron's items have been checked in, you select one or more items in the list and select **File, Check in Receipt**. If items are selected from multiple patrons, the items are grouped by patrons, and three blank lines are added at the end of each group. If auto-cut receipt printing is enabled, the receipt is cut at the end of each patron's group of items. (Items with no patron information, for example those that went from In to In at check in, are also grouped together and separated from patron items.) Polaris Administration settings control the specific information that appears on the receipt. See "Set check-in receipt options" in the *Polaris Patron Services Administration Guide 4.1R2*.

- **Fine receipts** list the fines paid or waived for overdue items, replacement items, and other fees for a patron. Fine receipts are printed automatically from the following locations:
    - Check In workform - Normal view (Check In - Fine dialog box)
    - Patron Status workform - Items Out view (Overdue Fine dialog box)
    - Patron Status workform - Account view (Pay and Waive dialog boxes)
    - Declare lost item dialog box
    - Item Record workform

  Polaris Administration settings control the specific information that appears on the receipt, and whether the receipt is printed for waive transactions. Your library can also set Polaris to print duplicate fine receipts if accounting practices require them. See "Set fine receipt options" in the *Polaris Patron Services Administration Guide 4.1R2*.

- **Hold slips/hold call slips** are printed automatically when an item's status becomes Held at the Check In workform, Check Out workform, Item Record workform, Patron Status workform - Items Out view, Hold Request workform, or Receive Shipment workform. Polaris Administration settings control the specific information that appears on the hold slip, and which hold slips are available. Polaris provides four types of hold slips:
    - **Default hold slip** - Prints automatically when an item's status becomes **Held** at a circulation transaction. Libraries typically place the hold slip with the held material for identification purposes. See "Set hold slip options" in the *Polaris Patron Services Administration Guide 4.1R2*.
    - **Hold call slip -** For libraries that call their patrons for held items. It includes extended information and is laid out so that the title information is exposed when placed in a book. See "Enable hold call slips" in the *Polaris Patron Services Administration Guide 4.1R2*.
    - **Hold/ILL pick-up slip** - For libraries where patrons to pick up their own held items. The hold pick-up slip is inserted in the book so that the patron's name, partial name, and/or barcode and the pick-up date are visible on the shelf. This slip is printed horizontally or vertically on the receipt paper, and requires a line mode receipt printer such as a Star® TSP600, Star TSP700, or Dell™ T200. See "Set up hold pickup slips" in the *Polaris Patron Services Administration Guide 4.1R2*.
    - **Combined in-transit/ hold slip** - If configured in Polaris Administration, a combined in-transit/hold slip will print when the item is sent in-transit. Then, instead of the pickup library printing a hold slip when the item arrives, the same slip can be used as a wrapper for the held item. See "Set in-transit slip options" in the *Polaris Patron Services Administration Guide 4.1R2*.

- **In-transit slips** are printed automatically when an item's status changes to Transferred (because the item will fill a hold and needs to be sent to the pick-up library) or In Transit (because the item belongs to another branch), and when you transfer an item for a hold from the Hold Request workform. You can place the in-transit slip with the item to be sent to the other branch. You can also choose to print an in-transit slip *only* when the item status changes to Transferred because it will fill a hold. Polaris Administration settings control the information included on the slip. See "Set in-transit slip options" in the *Polaris Patron Services Administration Guide 4.1R2*.

  Note:
  When an item's status changes to Transferred to fill a request, the in-transit slip includes the text **FOR HOLD**. The text does not appear on in-transit slips printed when an item is checked in and just needs to be shipped back to its assigned branch.

- **ILL slips** are printed automatically when an interlibrary loan item is received on the Request Manager workform - ILL Requests view. Libraries typically place the ILL slip with the material for identification purposes. The information that appears on the ILL slip is controlled by the same Polaris Administration settings that control hold slips. See "Set hold slip options" in the *Polaris Patron Services Administration Guide 4.1R2*.

- **Offline receipts** record the items checked out or renewed for a patron offline. The offline Check In workform list view can also be printed on a receipt or page printer.

  Note:
  Polaris supports hold pickup and in-transit slip printing on Epson® ReStick™ printers. For information about enabling this feature, see "Epson® ReStick™ Printers - Hold and In-Transit Slips" in the *Polaris Patron Services Administration Guide 4.1R2*.

Set the workstation to print receipts and slips

This procedure needs to be done only once *for each workform* from which you want to print, unless you want to change your settings. Follow these steps on each workstation to set Polaris to print receipts and slips from one or more workforms.

1. Open the appropriate workform from the Polaris Shortcut Bar:
   - **Check Out workform** - Select **Circulation, Check Out**.
   - **Check In workform** - Select **Circulation, Check In**.

     Note:
     Check-in receipts that list the items checked in for a patron or group of patrons do not print automatically, but are available for manual printing from the workform. See "Do a normal check-in from the Check In workform" on page 126.

   - **Request Manager workform** - Select **Circulation, Request Manager**.
   - **Hold Request workform** - Select **Circulation, Hold Requests**. Find and open the hold request (see "Find hold requests" on page 219).

- **Patron Status workform** - Select **Circulation, Patron Status**. Find and open any patron record (see "Find patron services and related records" on page 14).
- **Item Record workform** - Select **Cataloging, Item Records**. Find and open any item record (see "Find cataloging records in your library's database" in the *Polaris Cataloging Guide 4.1R2*).
- **Outreach Services Manager workform** - Select **Patron Services, Outreach Services**.
- **Receive Shipment workform** - Select **Acquisitions, Receive Shipment**.

2. On the workform, select **Tools, Options...** to display the Tools Options dialog box.

   The Receipt/Slip tabbed page appears.

   Important:
   Complete the Tools Options dialog box from *each* workform where you want to print receipts or slips. For example, if you want to print fine receipts when you are checking in items and when you are renewing items at the Patron Status workform - Items Out view, do this step for both the Check In workform and the Patron Status workform.

3. Select one or more of the following receipt/slip check boxes:
   - **Check out receipt**
   - **Fine receipt** - Select **Fine receipt** to print fine receipts from this workform. If you check **only if no eReceipt**, fine receipts are printed only when the patron does not receive eReceipts. If **only if no eReceipt** is not checked, printed receipts are produced in addition to eReceipts for patrons who receive eReceipts. For more information about setting up eReceipts in Polaris Administration, see "Setting Up eReceipts" in the *Polaris Patron Services Administration Guide 4.1R2*.
   - **In-transit slip**

     Note:
     Select **In-transit slip** if you want to print the slip when an item's status changes to Transferred (because it will fill a hold and needs to be sent to the pick-up library) or In Transit (because it belongs to another library). If you want to print the slip only when an item's status changes to Transferred, select (check) **Holds only**.

     If your library has enabled the combined In-transit and pickup slip, if the item is going in transit to fill a hold, the combined slip—which includes the holds pickup slip—prints at this point and the pickup slip will not print when the item is received at the destination branch.
   - **Hold slip**
   - **Hold call slip** (available if this option is enabled for your library)
   - **Hold pickup slip** (available if this option is enabled for your library)
   - **Print ILL slip** (Request Manager workform - ILL view only)
   - **Print ILL pickup slip** (Request Manager workform - ILL view only; available if the hold pickup slip is enabled for your library)

4. Select one of the following printer **Style** options:
   - To use a receipt printer, click **Receipt**.

     Note:
     If you are using a receipt printer, you may be able to set automatic cutting and printing options. See "Set receipt printer control codes" in the *Polaris Patron Services Administration Guide 4.1R2*. You can also customize the message text that appears on all receipts. See "Set receipt printer message text" on page 84. If you have experienced a problem with hold pickup slips, where the paper is not cut properly, see "Correct an auto-cut problem for hold pickup slips" on page 84.
   - To use a page printer, click **Page**.
5. Select the appropriate network printer in the **Printer** box.

   Note:
   If you are working offline in a terminal server environment, you may need to set up receipt printing again if you switch terminal servers. Check the printer setting to be sure the appropriate printer is selected.
6. If you use a receipt printer, select the appropriate printer driver in the **Drivers** box.

   These options are set in Polaris Administration. See "Set receipt printer control codes" in the *Polaris Patron Services Administration Guide 4.1R2*.
7. Click **OK** on the dialog box.
8. Repeat this procedure for each workform from which you want to print receipts or slips.

Related Information

- **Optional check-out receipts** - To conserve resources, your library may opt to print a check-out receipt only when the patron requests one. If the library has set this option in Polaris Administration and you have set check-out receipt printing for the workform, instead of automatically printing a receipt at the end of the check out or renewal process, a prompt to print the receipt is displayed and you can ask the patron if he wants a printed receipt. For information about setting this option in Polaris Administration, see "Set check-out receipt options" in the *Polaris Patron Services Administration Guide 4.1R2*.

  Note:
  The receipt prompt is not displayed for renewals from the Patron Status workform - Items Out view. You can optionally print a "receipt" from this view by suppressing check-out receipt printing from the workform **Tools** options, and then printing receipts on demand by printing the Items Out list by selecting the printer icon on the listview or pressing **CTRL+ALT+P**. The library can specify the information included in the printed version of the Items Out list. See "Set Items Out receipt options" in the *Polaris Patron Services Administration Guide 4.1R2*.

- **eReceipts** - Your library may enable eReceipts (e-mail and/or text message receipts) for patrons who prefer these instead of printed receipts. Enabling eReceipts for a patron does not automatically disable printed receipts , as the patron may want both on some occasions. The prompt for a check-out receipt, if enabled, will still appear for patrons who have opted for eReceipts. For information about enabling eReceipts in Polaris Administration, see "Setting Up eReceipts" in the *Polaris Patron Services Administration Guide 4.1R2*. For information about eReceipt settings in the patron record, see "Add notification data to a patron record" on page 27.

Set receipt printer message text

This procedure only needs to be done once unless you want to change your settings. Follow these steps to set a standard message that appears on check-out and fine receipts generated from the Polaris staff client and check-out receipts from Polaris ExpressCheck.

> **Note:**
> To customize message text, you must have the Circulation permission **Modify receipt message text: Allow**. See "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*.

1. Select **Circulation, Options** from the Polaris Shortcut Bar, or click .

   The Circulation Options dialog box appears.

2. Select the **Receipt Printer Options** tab.

   The Receipt Printer Options tabbed page appears.

3. Type your custom message in the **Message text** area.

   The custom message will be used by all workstations registered to your current log-on branch in Polaris Administration.

4. Click **OK** on the dialog box.

> **Important:**
> You may need to reboot ExpressCheck workstations to see your changes.

Correct an auto-cut problem for hold pickup slips

This procedure corrects an issue with hold pick-up slips on certain EPSON® and other line printers, where the paper is not cut properly at the end of the slip.

1. Open your EPSON Printer Preferences - Document Settings, and set Paper Source to *no* automatic feed and *no* automatic cut.

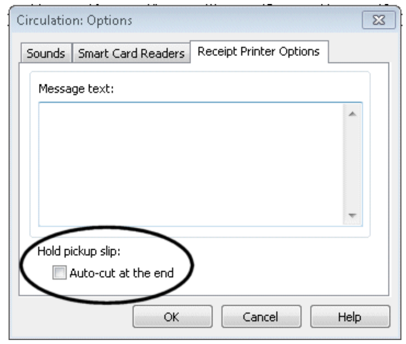
2. Select **Circulation, Options** from the Polaris Shortcut Bar, or click .

   The Circulation Options dialog box appears.

3. Select the **Receipt Printer Options** tab.

   The Receipt Printer Options tabbed page appears.

4. Select (check) **Auto-cut at the end**.



Important:
For line printers such as the Star® TSP series that cut the paper correctly, leave the **Auto-cut at the end** option unchecked.

Note:
This setting is also available in Polaris Administration (Patron Services parameters - **Hold slip pickup options**). See "Set up hold pickup slips" in the *Polaris Patron Services Administration Guide 4.1R2*.

5. Click **OK** on the dialog box.

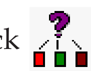
Setting Circulation Audio Signals

Audio signals at circulation alert you to processing events, messages, blocks, and other conditions. They are available during check-in and check-out transactions, and whenever circulation blocks appear. If your computer has a sound card and external speakers, you can specify different sounds to distinguish among the various circulation events. If you do not want to specify different sounds for audio alerts, each alert has the same low "beep" sound.

1-2-3

Set up audio circulation signals

Follow these steps to set sounds for the various audio alerts at circulation.

1. Select **Circulation, Options** from the Polaris Shortcut Bar, or click .

   The Circulation: Options dialog box appears.

2. Choose one of the following options:
   - If you want to specify sound types other than the default low beep, click **Use Windows Sounds**. Your computer must have a sound card and external speakers for this option.
   - If you do not want to specify sound types, click **Use Default Beep**.

3. Click **OK** on the dialog box.

4. If you clicked **Use Windows Sounds** in step 2, follow these steps to set up the sound for each message type:

   a) Select **Sounds and Audio Devices** (Windows XP) or **Sound** (Windows Vista, Windows 7) from the Windows Control Panel.

   The Sound dialog box appears.

   b) Click the **Sounds** tab.

   The Sounds tabbed page appears.

c) In the **Program** list, under **Windows**, select the event type to which you want to assign a sound. Polaris uses the following sound events (their Polaris message icons are in parentheses):

- **Asterisk (i)** - Polaris informational messages that do not require action, such as "Item was created on the fly"
- **Critical Stop (X)** - Polaris program errors, such as incorrect barcode or illegal operation
- **Default beep (no associated icon)** - The Special Loan dialog box, calendar controls, and scanning barcodes
- **Exclamation (!)** - Dialog boxes that are similar to errors or warnings, such as blocks and fines
- **Question (?)** - Error messages that present the user with options, such as renewal limits or holds

d) In the **Sounds** list, choose a sound for the selected event.

e) Repeat to assign a sound to each of the five Polaris event types.

f) Click **OK** on the dialog box.

5. Exit from the staff client and log back in to see the effects of your changes.

Related Information

Barcode scan signals - A Polaris Administration setting controls an audio alert for correctly reading patron and item barcode labels at check-in and check-out. The default setting is *off* because most barcode readers are programmed to beep for correct scans. To change the setting in Polaris if your scanner is not programmed for sound, see "Audio feedback for barcode scan (Workstation)" in the *Polaris Patron Services Administration Guide 4.1R2*.

Setting the Workstation for Smart Card Use

If your workstation uses a 3M™ smart card reader to read patron smart cards, you need to set the workstation to use the reader.

Set the workstation for smart card use

This procedure needs to be done only once. Follow these steps to set the workstation for smart card use.

1. Select **Circulation, Options** from the Polaris Shortcut Bar.

   The Circulation Options dialog box appears.

2. Select the **Smart Card Readers** tab.

   The Smart Card Reader tabbed page appears.

3. Select (check) **Smart card reader installed**.
4. Click **OK** on the dialog box.
5. Exit from the staff client and log back in to see the effects of your changes.

Related Information

Using the smart card reader at check-out - See “Check out an item” on page 94.

Check-Out and Renewal

Circulation transactions such as checking out an item record pare recorded in both the patron record and the item record, and information from both records is readily available. You can typically link to and work with these records without leaving your basic process, so you can readily resume checking out items or other circulation activities.

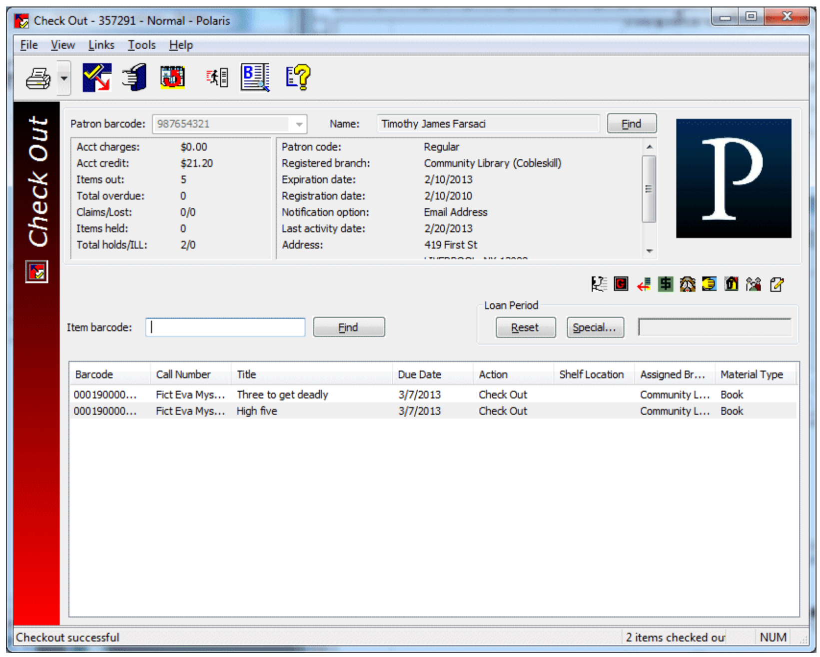
Your library has likely developed its own policies and procedures for circulation operations. This unit covers the basic check-out and renewal workflows that are the foundation for your library's procedures.

Note:
3M ebooks cannot be checked out or renewed from the staff client. Patrons can check out this econtent from the PAC patron account or the 3M Cloud application. For more information about these processes, see "Integrated Econtent in PAC" in the *Polaris Public Access Administration Guide 4.1R2*.

This unit covers the following topics:

Checking Out Items to Patrons

You check out items to a patron using the Check Out workform. As you work, the workform lists all the items checked out to a patron during the current session. The upper right portion to the Check Out workform summarizes the patron's registration information, and the upper left portion of the Check Out workform shows current patron status information and displays updates to the patron's status as changes occur during checkout.



Check-Out Blocks and Messages

Messages and blocks may appear during check-out and renewal:

Note:
Specific permissions are required to override many types of circulation blocks. See "Circulation and Patron Services Workflow Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*.

Patron and Item Blocks

- **Patron blocks** - You may see the Patron Blocks dialog box during check-out. Patron blocks relate to patron record conditions, such as overdue fines or the need to verify patron data. The Patron Blocks dialog box may also list blocks on associated patron records. See "Manage patron blocks at circulation" on page 117.

- **Patron has unread messages** - If a patron has unread messages, an alert message appears in the Patron Blocks dialog box. You can continue the check-out operation or cancel it, and you can also click the block text to open the Patron Status workform - Notes view. The alert message does not place any blocks on patron activity in the PAC. For more information about patron messages, see "Posting Patron Messages" on page 47.
- **Item blocks** - During check-out, you may see the Item Blocks dialog box. An item block may indicate that an item should not be checked out, or that it requires special handling. See "Manage item blocks at circulation" on page 121.
- **Non-circulating items** - You may see a message regarding restricted circulation. Your library may designate some items as non-circulating to all patrons, or may allow some items to circulate only to certain patrons. You can override the library policy and continue the check-out, or cancel the check-out for this item.

Overdue Fines

- **Overdue Fine dialog box** - This dialog box appears if there is a fine on an item that has already been checked out. You can accept payment and renew, waive the fine and renew, charge the patron's account and renew, or cancel the transaction. For details, see "Resolve a fine at renewal" on page 109. If the fine is on another patron's account, the Pay option is not available.
- **Automatic fine waivers** - Your library may choose to automatically waive overdue fines at check-out. For example, a patron may check out an item, and a message indicates the item is already checked out to another patron. If the item is also overdue, the library may want to simply forgive the fine. If Polaris is set to waive the fines, the Overdue Fine dialog box does *not* appear during check-out. For information on setting Polaris to waive fines, see "Set Polaris to waive fines at check-out or renewal" in the *Polaris Patron Services Administration Guide 4.1R2*.

Checkout Charge

The Patron checkout charge dialog box appears when you scan an item at checkout or renewal, the item's assigned branch has placed a charge on the item for checkout or renewal, and your library has set this dialog box to appear. You can accept payment and continue the transaction, waive the charge and continue the transaction, charge the patron's account and continue the transaction, or cancel the transaction. For more information about Polaris Administration settings for checkout and renewal charges, see "Charging for Checkout and Renewal" in the *Polaris Patron Services Administration Guide 4.1R2*.

Item Belongs to Another Library

You may see the following messages regarding an item's assigned branch:

- **This item is assigned to *library*. Do you want to continue with this transaction?** - The item does not belong to your branch. You can continue or cancel the check-out. If you cancel the check-out, a message asks if you want to put the item in-transit to the assigned branch. You can put the item in-transit to the item's assigned branch, or you can keep the item at your branch.
- **This item is in transit to *library*.** - The item's status indicates that it has been put in-transit to its assigned branch. However, you can still continue the check-out, or cancel it.

Holds Messages

During check-out or renewal, the following messages may appear relating to holds (see "Working with Hold Requests" on page 206):

- **This item satisfies a hold...Do you want to hold the item?** - The item satisfies a hold request for another patron. You can designate the item to fill the request (and stop the check-out), or override the request and continue with check-out. If you override the hold, a message asks if you want to reactivate the hold request for the patron whose hold request was overridden. This message will only display if the hold request option "Trap at check-out" is set for your branch. If your library has not set this option, the item will check out to the patron and the hold request will remain as it was for the requesting patron.

  Note:
  If you trap the item to fill the request, and hold slips are printed from the Check Out workform, a hold slip prints at the end of the check-out session. For information on setting your workstation to print hold slips, see "Setting Up Receipt Printing from Workforms" on page 79.

- **This item cannot be checked out, because it is being held** - The item is being held for another patron. You can override the hold and continue with check-out, or stop the check-out process. If you override the hold, a message asks if you want to reactivate the hold request for the patron whose hold request was overridden.
- **Transfer this item to *library* for hold?** - The item fills a hold request for a patron at another library. You can override the hold and continue with check-out, or stop the check-out process and transfer the item. If you override the hold, a message asks if you want to reactivate the hold request for the patron whose hold request was overridden. This message will only display if the hold request option "Trap at check-out" is set for your branch. If your library has not set this option, the item will check out to the patron and the hold request will remain as it was for the requesting patron.

  Note:
  If you transfer the item, and in-transit slips are printed from the Check Out workform, an in-transit slip prints at the end of the check-out session. For information on setting your workstation to print in-transit slips, see "Setting Up Receipt Printing from Workforms" on page 79.

Circulation Messages

You may see the following messages related to item circulation:

- **Item is over the renewal limit** - Renew the item anyway, or cancel the renewal.
- **The item is already checked out to this patron** - Renew the item, or cancel the renewal.
- **This item is already checked out to another patron** - Check in the item and then check it out to the current patron, or cancel the check-out. For information about check-in, see "Doing Normal Item Check-Ins" on page 123.
- **Item has an unexpected status** - Items with a status such as Withdrawn must be checked in before checking out.
- **Item is due at library closing time** - Allow the item to circulate overnight, or make the item due at closing time.
- **Item is on reserve for two or more courses** - Select the course for which the item is being checked out, or select no course.
- **Routed serial item** - If you try to check out a routed serial item, you receive an error message. Check the item in to change its circulation status from Routed to In (see "Doing Normal Item Check-Ins" on page 123), and then check it out. Or, go to the Notes view on the linked Issue record and change the issue's status to Returned or blank (see "Return a routed issue" in the *Polaris Serials Guide 4.1R2*). The item record's circulation status will be changed to In.
- **Dispensing unit** - If your library circulates certain items from a media dispenser, you may see an alert message (**Please retrieve items from the dispensing unit** or a similar message) when a dispenser item is checked out. Click **OK** to acknowledge the message, remind the patron to go to the dispenser unit to pick up the item, and continue. For more information about dispenser unit circulation, see "ITG DiscXpress II™ Circulation" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Resolve lost/billed item dialog box** - This dialog box appears when an item has been declared lost, but the item is found at circulation. See "Resolve a lost-and-unpaid item at circulation" on page 162 and "Resolve a lost-and-paid item at circulation" on page 163.

Outreach Services Patrons

You may see the following messages related to Outreach Services patrons:

- If a specific item has been checked out to an active outreach services patron in the past, a message appears. You can continue to check out the item, or cancel the check-out. See "Outreach Services Processing" on page 274.
- Your library may display a prompt to update an active Outreach Services patron's next service date if the item is not on the patron's pick list. If you choose to update the next service date from the prompt, the patron's Next Service Date and Last Service Date are updated based on the Outreach Services delivery schedule set for that patron. See "Outreach Services Processing" on page 274. If no prompt is displayed, or if you choose not to update the service date, the patron's next service date is not affected. For information about setting the prompt to be displayed, see "Prompt - update next service date at normal check out" in the *Polaris Patron Services Administration Guide 4.1R2*.

Check out an item

Follow these steps to check out items. The procedure is the same when you are working offline, although the workform differs somewhat. (For information on messages that may appear, see "Check-Out Blocks and Messages" on page 90.)

Note:
Your library may use Polaris Quick-Circ to circulate uncataloged items that will never be fully cataloged. You can create quick-circ item records directly at check-out. See "Circulating Ephemeral Items" on page 143.

1. Select **Circulation, Check Out** from the Polaris Shortcut Bar, click  on the Shortcut Bar, or press **F3**.

   The Check Out workform opens.

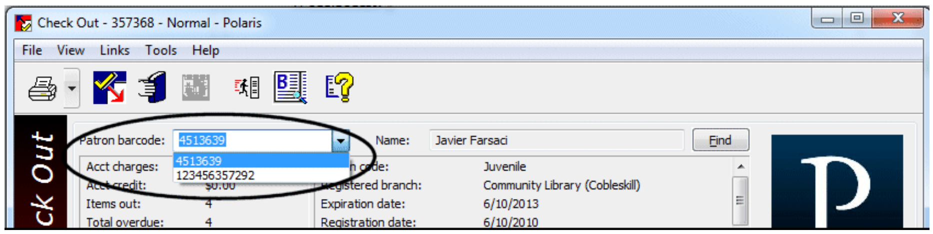
Tip:
From a Find Tool results list of patron records, you can right-click a patron record and select **Check Out** from the context menu. The Check Out workform opens with the patron information filled in.

2. Enter patron information using one of the following methods:
   - Scan the patron barcode in the **Patron barcode** box, or type the barcode and press **ENTER**.

     If your library system allows you to use just the significant digits (the last unique portion) of a patron barcode, you can type just this part of the barcode. If the unique part of the barcode begins with one or more zeroes, you do not need to type these. The system supplies the complete barcode, including any leading zeros. For more information about setting Polaris to use significant digits, see "Significant Digits in Patron Barcodes" in the *Polaris Administration Guide 4.1R2*.
   - Click the **Find** button next to the **Patron name** box to display the Polaris Find Tool and search for the patron's record.

Note:
If no matching patron record is found, Polaris displays a message. You can express-register a patron at check-out. See “Express-register a new patron at check-out” on page 102.

- If the patron is checking out more materials after completing one transaction, select the arrow by the **Patron barcode** box or press **F4** and select the patron’s barcode from the list. The list contains up to two patron barcodes—the last patron, and the one before that patron. The list is cleared when you close the Check Out workform.



- If your library uses 3M™ smart cards, select **Tools, Read Smart Card** (or press **CTRL+ALT+S**), and place the patron’s card in the reader.

  Note:
  To use the smart card reader on this workstation for the first time, you need to enable the smart card reader for the workstation. See “Set the workstation for smart card use” on page 88.

The **Patron barcode**, **Patron name**, and other patron information are filled in. The specific patron fields on the workform are determined by Polaris Administration settings. See “Setting Up the Check Out Workform” in the *Polaris Patron Services Administration Guide 4.1R2*.

Note:
If your library uses patron photos in patron records, and your workstation is set to display the photos, the patron’s photo is displayed on the Check Out workform.

3. If you want to assign a loan period that is different from the standard one, create a special loan period. See “Assign a special loan period” on page 99.

   All daily and weekly loans are due at 11:59 P.M. on the due date.

Tip:
If you are checking out a number of items for a patron, some with barcodes and some with RFID tags, group the items so that you check out all of one type, then all of the other. This method is faster than repeatedly switching between the barcode scanner and the RFID reader.

4. Enter item information using one of the following methods:
   - Scan the item barcode in the **Item barcode** box, or type the barcode and press **ENTER**. If you use RFID tags as well as barcodes, this method does not clear the security bit for RFID items.
   - Select **Tools, RFID Checkout** (or press **F9**), and place up to 10 items on the antenna tray. This method clears the security bit for each item.

     You must select **Tools, RFID Checkout** or press **F9** for each batch of items you place on the RFID antenna tray.

     Important:
     Verify the item record is *not* open before pressing **F9**, as failure to do so could re-initialize the RFID tag.

Tip:
To see more information about an item, you can view an item record from the list of items checked out. Right-click an item in the list, and select **Open** from the context menu. Or select **Links** from the context menu to see choices related to circulation, holds, bibliographic, and other information.

Tip:
If your library includes a title column in the list of items checked out, and a checked-out item is a serial, the serial designation (enumeration and chronology) is added to the title. You may need to expand the title column to see the designation.

- To find an item without the barcode, click the **Find** button next to the **Item barcode** box to display the Polaris Find Tool and search for the item record.

  If no item record exists, you can create an interim (on-the-fly) item record at check-out, provided an on-the-fly template exists. See "Create an on-the-fly item at checkout" on page 105. Use this method for items that will be fully cataloged eventually. If you are dealing with an item with no barcode that will never be fully cataloged, see "Checking Out Quick-Circ Items" on page 148.

When the item information has been entered, the status bar indicates that the check-out was successful. The item information appears in the list of items checked out. The specific data columns in the list are determined by Polaris Administration settings. See "Setting Up the Check Out Workform" in the *Polaris Patron Services Administration Guide 4.1R2*.

5. Repeat the previous step until you have checked out all the patron's items.

   The total number of items checked out appears in the status bar at the bottom of the workform.

   Note:
   Your library may allow you to reset the due dates of the items listed in the Check Out workform. See "Reset due dates of checked-out items" on page 100.

6. To complete this patron's session, verify that the **Item barcode** box is blank and press **ENTER.**

   Check-out receipt printing:

   - If it is the library's policy to always print check-out receipts and the workform is set up to print check-out receipts, a receipt is printed automatically.

     Note:
     For the first time after installation only, you need to set up Polaris to print receipts and slips. See "Setting Up Receipt Printing from Workforms" on page 79.

   - To conserve resources, your library may opt to print a check-out receipt only when the patron requests one. If so, and you have set check-out receipt printing for the workform, instead of automatically printing a receipt, a prompt to print the receipt is displayed and you can ask the patron if he wants a printed receipt. This option applies only to online staff client operations; a checkout receipt with limited data is always printed during offline circulation. For information about setting this option in Polaris Administration, see "Set check-out receipt options" in the *Polaris Patron Services Administration Guide 4.1R2*.

- Your library may provide eReceipts (e-mail and/or text message receipts) for patrons who prefer these instead of printed receipts. If so, and this patron receives an eReceipt, no receipt is printed and no prompt is displayed. For information about enabling eReceipts in Polaris Administration, see "Setting Up eReceipts" in the *Polaris Patron Services Administration Guide 4.1R2*. For information about eReceipt settings in the patron record, see "Add notification data to a patron record" on page 27.

  Note:
  You can view and print a list of all the items a patron has currently checked out, regardless of when the items were checked out. See "Displaying All Items Out" on page 166.

Related Information

- **Finding bibliographic records** - If a patron wants more information about a title, you can search for bibliographic records without leaving the Check Out workform. Click  in the toolbar or press **CTRL+B**. From the Find Tool results list, you can open the bibliographic record. This feature is also convenient for finding an item's missing barcode. Right-click the bibliographic record in the results list, and select **Links, Item Records**.
- **Finding any item record** - You can search for any item record without leaving the Check Out workform and without entering patron information. Click  in the toolbar or press **CTRL+B**. and select **Item Records** from the Object list in the Find Tool. You can set the Find Tool so the results list is retained even after you select an item in the results list and open it. Select the Find Tool **Options** menu and be sure **Close on Open** is unchecked.
- **Opening patron workforms** - On the Check Out workform, you can select the buttons above the list of items to open the Patron Registration workform and specific Patron Status views. When you move the cursor over a button, you see a tooltip that identifies the button, and an equivalent shortcut key.

  Note:
  The Patron Status workform - Items Out view lists items the patron currently has checked out. See "Displaying All Items Out" on page 166. You can print the complete list and estimate fines on overdue items from this view.
- **Changing due dates**
  - **Before check-out** - See "Assign a special loan period" on page 99.
  - **After check-out** - See "Reset due dates of checked-out items" on page 100.

- **Automatic shortened loan periods** - Your library may choose to shorten an item's loan period automatically under the following circumstances:
  - A specified number of hold requests are placed for the item. See "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*.
  - The due date is past an end-of-term due date. See "Setting End-of-Term Due Dates" in the *Polaris Patron Services Administration Guide 4.1R2*.

  In either case, you may see a message that the loan period has been shortened.
- **Renewing items with hold requests** - When you attempt renew an item with a hold request on it, you may see a block message. Withe the appropriate permission, you can continue the renewal or cancel the renewal and trap the item to fill the hold request. See "Renewing Items with Hold Requests" on page 107.
- **Offline checkout** - For offline circulation, the system always uses the workstation branch's setting for the Patron Services parameter **Standard loan period** to calculate the due date. This is because there is no access to the database during offline circulation. However, the Loaning Branch recorded in the transaction and in the item record is the logged-on user's branch. This allows libraries to gather statistics for different bookmobile stops based on user log-on, while maintaining a consistent loan period for the bookmobile (the workstation branch). For more information about offline circulation, see "Managing Offline Circulation" in the *Polaris Patron Services Administration Guide 4.1R2*.

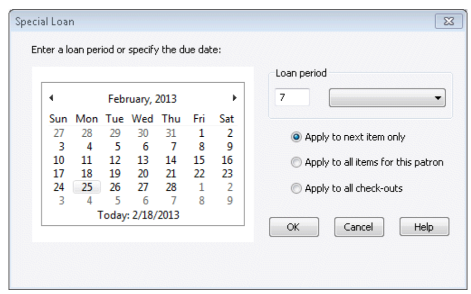
Assign a special loan period

The usual loan period for an item type is specified through Polaris Administration. However, sometimes you need to change an item's loan period at check-out or renewal. Perhaps a patron is going on vacation, or you want to override an end-of-term due date. At check-out or renewal, you can create a special loan period for items assigned to your branch if you have the appropriate permission (see "Checking Out" in the *Polaris Patron Services Administration Guide 4.1R2*). Follow these steps to change the standard loan period before the items are checked out or renewed.

> **Note:**
> Your library may allow you to reset due dates *after* items have been checked out. See "Reset due dates of checked-out items" on page 100.

1. Display the Check Out workform and input the patron's barcode. See "Check out an item" on page 94.
2. Click **Special** in the Loan Period area of the workform.

   The Special Loan dialog box appears.



3. Set the due date by one of these methods:
   - To specify the exact date, select a date on the calendar.

     The loan period appears in the **Loan period** boxes to the right of the calendar.
   - To specify the loan period, type the number of minutes, hours, or days in the **Loan period** value box, and select the loan interval (minutes, hours, or days) in the **Loan period** interval box. These boxes are located to the right of the calendar.

     The due date is calculated and highlighted on the calendar. The system takes closed days and dates into account when calculating the due date.
4. Choose one of the following options to specify the application of the special loan period:

   > **Important:**
   > The special loan period must be set *before* you scan the affected items.

   - To apply the loan period to the patron's next item only, select **Apply to next item only**.
   - To apply the loan period to all the items for this patron, select **Apply to all items for this patron**.

- To apply the loan period to all items being checked out during the current session, select **Apply to all checkouts**. If you select this option, the setting remains in effect until you click **Reset** on the Checkout workform or close the workform.

5. Click **OK** on the dialog box.

   The Check Out workform appears, and the loan period or due date (depending on the selection method) appears in the **Loan Period** box.

6. Scan the item barcode in the Item barcode box, or type the barcode and press **ENTER**.

   The status bar indicates that the checkout was successful. The item information appears in the Items Checked Out list.

Related Information

- **Special loan periods at renewal -** You can also assign special loan periods when you are renewing items from the Patron Status workform. See "Renew items from the Patron Status workform" on page 108.
- **Automatic shortened loan periods** - Your library may choose to shorten an item's loan period automatically under the following circumstances:
  - A specified number of hold requests are placed for the item. See "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*.
  - The due date is past an end-of-term due date. See "Setting End-of-Term Due Dates" in the *Polaris Patron Services Administration Guide 4.1R2*.

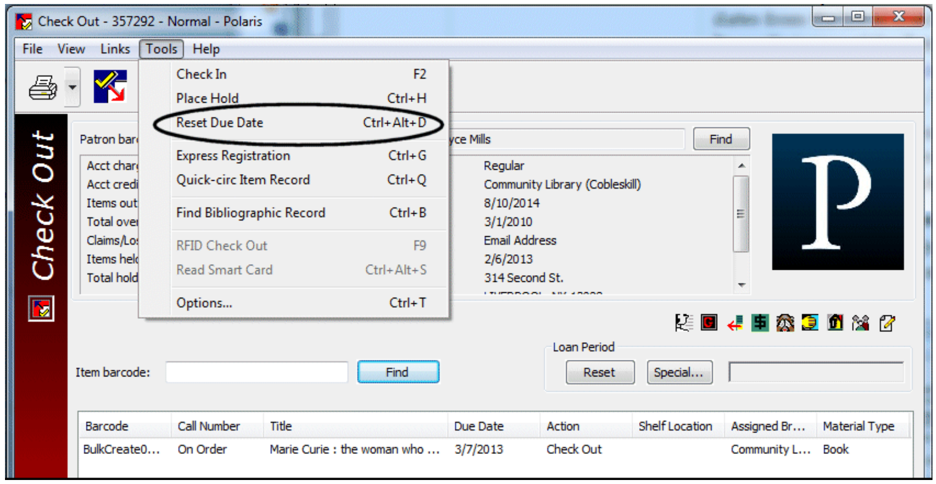
  You may see a message that the loan period has been shortened.
- **Hourly loans** - Your library determines whether hourly loans of 23 hours or less are due at closing time or due on the next day the library is open. Whether your library allows automatic overnight loans or blocks overnight hourly loans, your library can also set additional time so that items do not become overdue immediately upon the library's opening. See "Hourly Loans" in the *Polaris Patron Services Administration Guide 4.1R2*.

Reset due dates of checked-out items

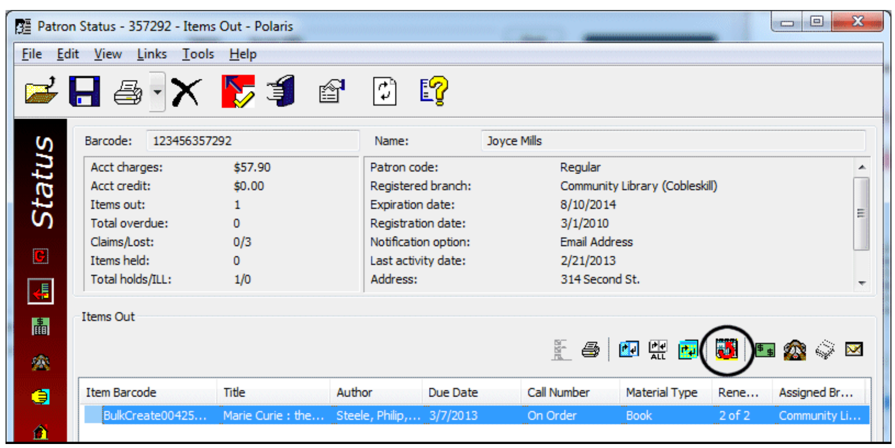
Your library may allow you to change the due dates of selected items after they have been checked out. (The items must have a status of Out.) For example, a patron may realize that she will be out of town on the original due date, so you make the item due a few days later. You can reset the due dates from the list of checked-out items in the Check Out workform or the Items Out view of the Patron Status workform if you have the appropriate permissions (see "Checking Out" in the *Polaris Patron Services Administration Guide 4.1R2*). Follow these steps to reset due dates.

1. Select the item or items in the item list of the Check Out workform or the Patron Status workform:

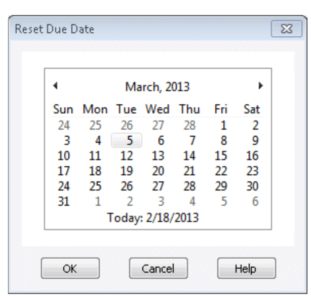
- **Check Out workform** - Select the items in the list view, then select **Tools, Reset Due Date,** click on the toolbar, or press **CTRL+ALT+D**. (You can also right-click a selected item and select **Reset Due Date** from the context menu.)



- **Patron Status workform - Items out View** - Select the items in the list view and select the Reset Due Date icon above the list view (or press **CTRL+ALT+D**). You can also right-click a selected item and select **Reset Due Date** from the context menu.



The Reset Due Date calendar control opens.



2. Select the new date on the calendar, and click **OK**.

   The new date must be in the future. If the selected date is a closed date or day, the system displays a message, and you can accept the new date or cancel the operation. You may also see messages for the following item blocks: system-assigned blocks; library-assigned blocks; free text blocks; non-circulating item blocks; ILL items. See "Manage item blocks at circulation" on page 121.

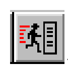
   When you click **OK**, the calendar closes and the new due date for the item or items is displayed in the item list view.

   Note:
   When you reset due dates from the Check Out workform, the check-out receipt lists each item with the original due date, with a note at the end stating the new due date. If the date has been changed more than once, the last date chosen is noted. If different dates have been set for multiple items, the date of the last item changed is printed.

Express-register a new patron at check-out

With the appropriate permission, and if express registration is enabled for your branch, you can register a patron from the Check Out workform. The new patron can check out items immediately upon registering, but your library may have a block placed automatically on the new patron record so that the registration information is reviewed and the block cleared before further circulation transactions occur. Follow these steps to register a patron at check-out.

1. Select **Circulation, Check Out** to display the Check Out workform.

2. Select **Tools, Express Registration**, click , or press **CTRL+G.**

   The Express Registration workform appears. The Express Registration workform has the same fields as the Patron Registration workform, but your library specifies values that automatically appear on the Express Registration workform and required fields. See "Setting Express Registration Defaults and Requirements" in the *Polaris Patron Services Administration Guide 4.1R2*.

Tip:
Tab between boxes on the workform to speed data entry. In each drop-down box, you can type the first letter of an option, rather than selecting it from the list.

3. Fill in the workform with the appropriate data (see "Create a patron record" on page 21).

   Note:
   These fields are always required: **Barcode**; **Last name**; **First name**; **Registered at**; **Patron code**; **Expiration** term/date; **Address check** term/date; **Notification option** and corresponding notification field (for example, **Voice phone 1** and the telephone number).Your library may require additional fields. Required fields are displayed in bold type.

4. Select **File, Save** or press **CTRL+S** to save the record.

   The Check Out workform appears with the **Patron barcode**, **Name**, and **Registered at** boxes filled in, and you can continue checking out the item.

Related Information

Express registration blocks - A Polaris Administration setting controls whether a Verify Patron block is placed on a patron record created through express registration. See “Setting Express Registration Defaults and Requirements” in the *Polaris Patron Services Administration Guide 4.1R2*. For information about clearing the block, see “Resolve a Verify Patron block” on page 118.

Checking Out Uncataloged Items

Using the on-the-fly (OTF) function, you create minimal-level item and bibliographic records, according to the template the library has previously defined. This allows the uncataloged items to be checked out before they are fully cataloged.

Note:
Your library may circulate materials that are never intended for full cataloging (ephemeral items). These do not require an on-the-fly template. See "Circulating Ephemeral Items" on page 143.

Create on-the-fly item templates

If you will circulate on-the-fly items, you must first create an on-the-fly template. Follow these steps to create the template for uncataloged on-the-fly items.

Notes:

Each branch that allows uncataloged items to be checked out needs an on-the-fly template as described here. You need to do this procedure only once for each branch.

You need a separate template for ILL items. See "Receiving Interlibrary Loans" on page 255.

1. Select **File, New** from the Polaris Shortcut Bar to display the New dialog box.
2. Select **Item Template** from the Objects list, and click **OK**.

   The Item Template workform - Cataloging view appears.
3. Type **On the fly** in the **Name** box.

   Important:
   Name the template exactly as it appears here.
4. Select *your branch* (not yourself) in the **Template owner** box.
5. In the **Circ status** box (**Identification** section of the workform), select **In**.
6. Make the following settings in the **Circulation parameters** section of the workform:
   a) Select the material code in the **Material type** box.
   b) Select the loan period code in the **Loan period** box.
   c) Select the fine code in the **Fine code** box.
   d) Set the number of times an item can be renewed in the **Renewal limit** box.
7. Make the following settings in the **Call number** section of the workform:
   a) Select the shelving system in the **Scheme** box.

b) (Optional) To track on-the-fly records more easily, type **OTF** in the **Class** box. **OTF** is then automatically inserted in the item's call number when the item record is created.

8. If you want to input or change information in other boxes (such as **Assigned** [branch] or **Collection**), type or select the information.

9. Select a branch in the **Home branch** field.

   This field is used in floating collections processing. If your system does not use floating collections, set the **Home** branch to the same organization as the **Assigned** branch. For more information about floating collections, see "Setting Up Floating Collections" in the *Polaris Patron Services Administration Guide 4.1R2*.

10. If your system uses floating collections, and your branch does not float OTF items, select (check) **Do not float**.

11. Select **File, Save** to save the template.

    Once you have created the appropriate template, you can check out on-the-fly items. See "Create an on-the-fly item at checkout" on page 105.

Create an on-the-fly item at checkout

Follow these steps to create an item record on-the-fly for uncataloged items as you check them out.

Important:
You must have an on-the-fly item template already created to do this procedure. See "Create on-the-fly item templates" on page 104. Also, the Polaris permission **Create an on-the-fly item at checkout: Allow** must be set for your user name and workstation.

1. If you scan or type an item barcode at the Check Out workform and Polaris alerts you that the item is not linked to a record, confirm that you want to create a record on-the-fly by clicking **Yes**.

   On-the-fly item barcodes cannot begin or end with spaces.

   Note:
   If you click **No**, the Check Out workform appears with the Item barcode box cleared, allowing you to check out other items.

   The Brief Item Entry dialog box appears with the new barcode in the **Barcode** box.

Tip:
To make items easier to search for and find, type **OTF** in the **Title** or **Call number** boxes or add **OTF** to the call number field in the template.

2. Type the title in the **Title** box.

   Note:
   Initial articles, such as *A*, *An*, or *The*, are not observed when OTF titles are indexed. It may be advisable not to enter initial articles when typing a title.

3. Type a call number in the **Call number** box, if appropriate.

4. Type an author in the **Author** box (optional).

5. If you want to type a note, type the information in the **Free text** block.

6. Review the default settings in the remaining boxes and change them, if necessary.

   Note:
   By default, **Set OTF Block** is checked. When this option is selected, and a previously uncataloged OTF item is checked in, a block message notifies you that it requires full cataloging. You can override the block to check in the item and allow it to circulate. However, the item will be blocked at circulation until it is fully cataloged, or until you save the item record and choose to stop blocking the item. When the bock is cleared, the First Available Date fields for the item and linked bibliographic records are set.

7. Click **OK** to submit your settings.

   If **Set OTF Block** is checked, you see a message indicating that the item was created on-the-fly and requires full cataloging. Click **OK** to continue. The item is created with the Polaris-assigned block.

   Note:
   If **Set OTF Block** was checked, the item will be blocked at circulation until it is fully cataloged, or until you save the item record. Upon saving the record, a prompt appears. Click **No** to stop blocking the item.

   The Check Out workform appears with the item information in the Items Checked Out list. The status bar indicates that the checkout was successful.

Renewing Items

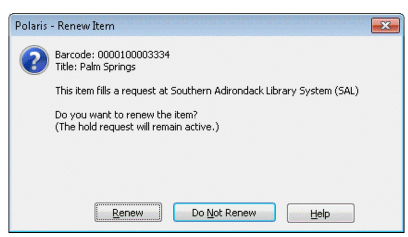
When you renew an item for a patron, the new due date is calculated automatically, based on the library's standard policies. However, you can also assign a special loan period for the renewal (see "Assign a special loan period" on page 99). You can do a renewal from the following locations in Polaris:

- **Check Out workform** - When you attempt to check out an item that has already been checked out to the selected patron, Polaris prompts you for renewal confirmation. See "Check out an item" on page 94 for this method.
- **Patron Status workform - Items Out view** - If you want to renew one or several items checked out to a patron, you can do the renewal from this location. This method is convenient because you can select and renew multiple items without scanning the barcodes. See "Renew items from the Patron Status workform" on page 108 for this method.

Note:
Your library may allow patrons to renew items from the PAC or by telephone. If so, the library may set special conditions for these patron-initiated renewals. See "Defining Patron-Initiated Circulation Blocks" in the *Polaris Patron Services Administration Guide 4.1R2*.

Renewing Items with Hold Requests

If you try to renew an item with Active, Inactive, or Pending requests for that title, the renewal may be blocked and a message displayed.



Your library may set the Polaris so that this block message appears when the item being renewed is the only item available to fill the request. If other holdable and potentially eligible items are In, no dialog box appears and the item can be renewed. (The other In items could be identified by the next round of RTF processing and pulled to fill the request.) For more information, see "Blocking Holds at Renewal" in the *Polaris Patron Services Administration Guide 4.1R2*.

When you see the block message, with the appropriate permission you can renew the item or cancel the renewal and trap the item to fill the hold request.

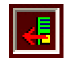
Renew items from the Patron Status workform

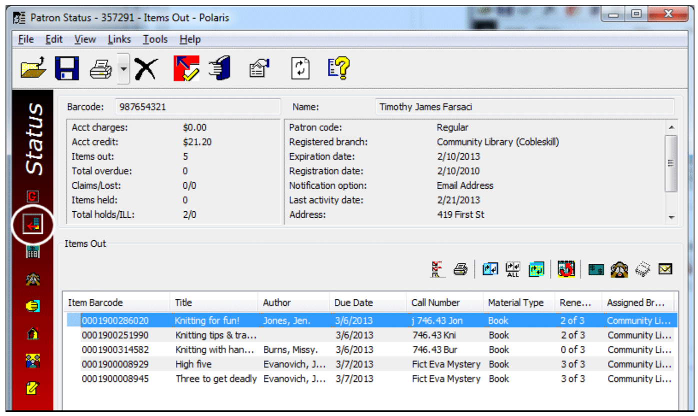
Follow these steps to renew items from the Patron Status workform.

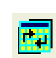
Note:
For information on messages and dialog boxes that may appear while you are renewing items, see "Check-Out Blocks and Messages" on page 90.

Tip:
If a checked-out item is a serial, the serial designation (enumeration and chronology) is added to the title. You may need to expand the title column to see the designation.

1. Open the patron's record in the Patron Status workform. See "Find patron services and related records" on page 14.

2. Select **View, Items Out** or click  to display the Items Out view.



3. Choose one of the following options:
   - If you are renewing one or multiple items, select the items in the Items Out list, and click  or press **CTRL+R.**
   - If you are renewing all items, click  or press **CTRL+A**.
   - If you are doing a special renewal, select the appropriate items in the Items Out list, and click  or press **CTRL+E**.

     The Special Loan dialog box appears. See "Assign a special loan period" on page 99.

     The permission of "Modify renewal period" is required to select this option.

   The new due dates are displayed.

Receipt printing:

- A receipt prints automatically if it is the library's policy to always print the check-out receipt and you have set this workform to print check-out receipts.

  Note:
  For the first time after installation only, you need to set up Polaris to print receipts and slips. See "Setting Up Receipt Printing from Workforms" on page 79.

- If it is your library's policy to print a check-out receipt only when the patron requests one, select **Tools, Options** and uncheck the **Check out receipt** option. If the patron requires a printed receipt, print the Items Out list by clicking the printer icon above the list (or press **CTRL+ALT+P**).

  Note:
  The library can specify the information included on the printed Items Out list. See "Set Items Out receipt options" in the *Polaris Patron Services Administration Guide 4.1R2*.

- Your library may provide eReceipts (e-mail and/or text message receipts) for patrons who prefer these instead of printed receipts. For information about enabling eReceipts in Polaris Administration, see "Setting Up eReceipts" in the *Polaris Patron Services Administration Guide 4.1R2*. For information about eReceipt settings in the patron record, see "Add notification data to a patron record" on page 27.

Related Information

Change due dates without renewal - See "Reset due dates of checked-out items" on page 100.

Resolve a fine at renewal

If your library charges fines for overdues, Polaris automatically calculates the fine amount. When you attempt to renew an overdue item at the Check Out workform or the Patron Status workform - Items Out view, a message indicates that the patron owes a fine for the item. You need permission to renew overdue items to renew the items and resolve the charge. Follow these steps to pay, waive, or charge a fine when you renew an overdue item.

Important:
If your library uses Active Payment Manager (Class Point of Sale) to manage payments, you cannot pay a fine from the Check Out workform or the Patron Status workform - Items out view. Instead, you must charge the fine to the patron's account, then pay it from the Patron Status workform - Account view.

1. Renew an overdue item from one of the following workforms:
   - Check Out workform (see "Check out an item" on page 94)

- Patron Status workform - Items Out view (see "Renew items from the Patron Status workform" on page 108)

The Overdue Fine dialog box appears.

Note:
If your library automatically waives overdue fines at renewal, the Overdue Fine dialog box does *not* appear. However, an auto-waive transaction line item appears in the patron's account in the Transaction Summary dialog box. See "Display completed account transactions" on page 176.

Tip:
To cancel the renewal, click **Cancel**.

2. If you want to *pay* the fine and allow the renewal, follow these steps:

a) Click **Pay**.

The Pay dialog box appears.

b) Type the amount to pay in the **Amount** box (maximum $2,000,000.00), if you are paying an amount other than the exact amount of the fine:

- **Partial payment** (less than the fine) - The payment will be recorded as a partial payment on the fine, and the Account Transaction list in the patron's record will show a balance for the charge. See "Pay charges from the Account view" on page 180.
- **Overpayment** (more than the fine) - If your library allows overpayments to be recorded as account credits, a dialog box appears that alerts you to the overpayment and provides the choice of crediting the account or not. Click **Yes** to credit the patron's account. Click **No** to pay the charge without recording a credit. (Click **Cancel** if you entered the wrong amount.)

  If your library does not allow overpayments to be recorded as credits, a message indicates how much change you should give the patron. Click **OK** on the message box.

c) Select a payment method in the **Method** box, and click **OK**.

Note:
If your library accepts credit card payments, and the patron wants to pay with a credit card, select **Credit card** in the method box. For more information about taking credit card payments, see "Take credit card payments for fines and fees - PayPal Payflow Pro" on page 188 or "Take payments for fines and fees - Comprise SmartPAY" on page 190

A record of the charge and payment appears in the Transaction Summary dialog box for the patron account. If the fine was only partially paid, or if an overpayment was credited, the transactions appear in the Account Transaction list for the patron account. See "Viewing Patron Financial Accounts" on page 174 and "Processing Charges and Payments" on page 179.

3. If you want to *waive* the fine and allow the renewal, click **Waive**.

   The dialog box closes. A record of the waiver appears in the Transaction Summary dialog box for the patron account.

4. If you want to *charge* the fine to the patron's account and allow the renewal, click **Charge Account**.

The charge appears on the Patron Status workform - Account view. To resolve the charge later, you must pay or waive the fine from the Account view. See "Pay charges from the Account view" on page 180.

If you set Polaris for fine receipt printing at this workform, a fine receipt prints (see "Setting Up Receipt Printing from Workforms" on page 79).

Note:
Your library may suppress fine receipts for waive transactions. See "Set fine receipt options" in the *Polaris Patron Services Administration Guide 4.1R2*.

Related Information

- **Fine calculation** - Polaris Administration settings control how fines are calculated. See "Defining Fines and Fees" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Setting Polaris to auto-waive fines at renewal** - See "Set Polaris to waive fines at check-out or renewal" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Overdue blocks** - See "Working with Blocks (Stops)" on page 116.
- **Active Payment Manager (Class Point of Sale)** - See "Using Class Point of Sale with Polaris" in the *Polaris Patron Services Administration Guide 4.1R2*.

Viewing Item Records

As you do circulation transactions, information in the affected item records is updated. This information appears on the Item Record workform. From the Item Record workform, you can link to relevant patron records, hold requests, and other information.

This section is a summary of item record features. For more information about item records, see “Maintaining Item Records” in the *Polaris Cataloging Guide 4.1R2*. Your Polaris administrator can set a preferred opening view for the item record workform. See “Setting Preferred Workform Views” in the *Polaris Administration Guide 4.1R2*.

Display item record information

Follow these steps to display the Item Record workform.

Note:
You need specific permission to access item records, and to modify the various Item Record workform views.

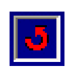
1. Right-click an item in the Patron Status workform - Items Out view, the Check Out workform, or the Check In workform, and select **Open** from the context menu.

   The Item Record workform opens.

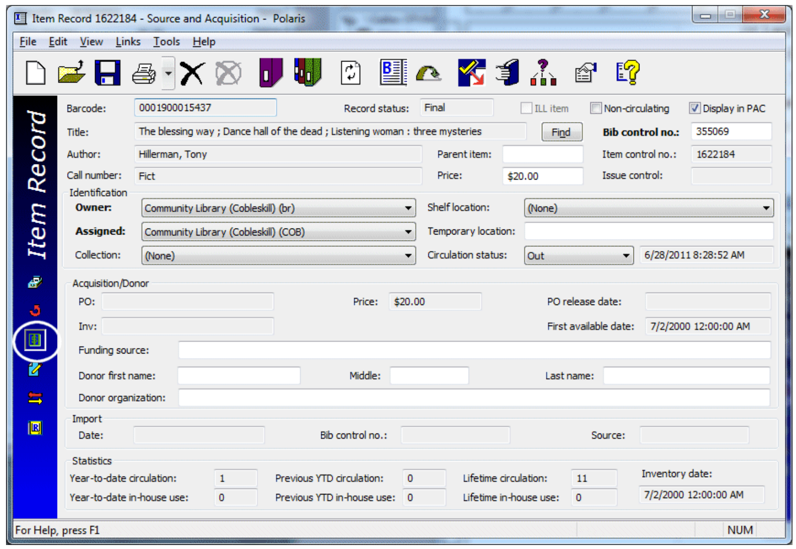
   Note:
   You can also open an item record by searching for it with the Find Tool. Select **Cataloging, Item Records** on the Polaris Shortcut Bar.

Tip:
You can see a summary of useful circulation and other information in the item record’s property sheet. In a Find Tool results list, right-click the item record and select **Properties** from the context menu. On the item Record workform, click .

2. Select a view:

   - Select **View, Cataloging** or click  to see circulation and request settings, and call number details.
   - Select **View, Circulation** or click  to see current and past circulation data, hold information, and details about In Transit and Transferred transactions. To open the current or last borrower’s record in the Patron Status workform - Items Out view, select **Links, Borrower**, or double-click the patron barcode in the **Current borrower** or **Last borrower** field. If the item is being held for a patron, you can open the patron’s record in the Patron Status workform - Requests view. Select **Links, Held For**, or double-click the patron barcode in the **Held for patron** field. The **Held at** field shows the pickup branch when the request status is Held, Unclaimed, or Shipped. See “Working with Hold Requests” on page 206.

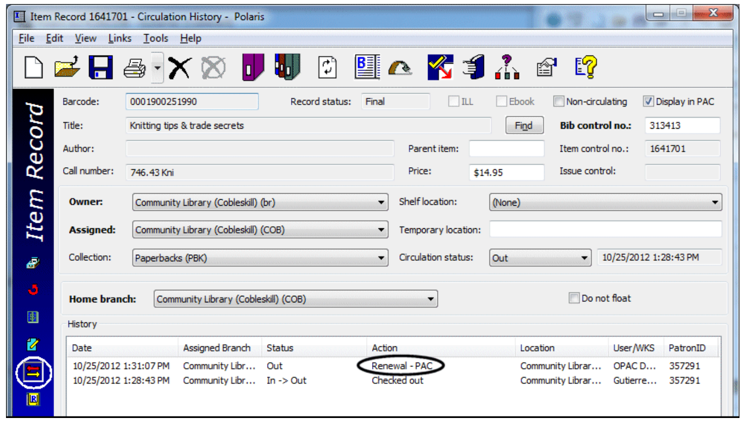
- Select **View, Source and Acquisition** or click to see acquisition information such as price, funding, and order details, information about the imported bibliographic record, if any, and donor information, if any. For more information about acquisitions processing, see "Getting Started in Acquisitions" in the *Polaris Acquisitions Guide 4.1R2*. This view also shows circulation statistics, the item's first available date, and the item's last inventory date.

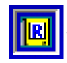


- Select **View, Notes and Notices** or click to see an item's notice history, notes, and blocks. When an item has a note, the Notes and Notices icon changes to yellow. When an item has a block, the Notes and Notices icon changes to red. See "Working with Blocks (Stops)" on page 116.

- Select **View, History** or click to see the circulation history of an item as it circulates, including the method by which the item was checked out or renewed. This view also shows the item's home branch and whether it is allowed to float, information that is useful if your system uses floating collections. For more information, see "Setting Up Floating Collections" in the *Polaris Patron Services Administration Guide 4.1R2*.

  Note:
  Your library may choose to remove patron ID information from the item record history after a specified period of time. See "Removing Patron ID Information from Transaction Files" in the *Polaris Patron Services Administration Guide 4.1R2*.



- Select **View, Reserves** or click  to see circulation settings that apply to the item if it is placed on reserve for a course, and a list of the linked course records. If the item is on reserve, this view opens first. See "Managing Course Reserves" on page 304.

Circulation Reports

Circulation reports help you track circulation, overdue items, and delinquent patrons. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Circulation** in the Polaris Reports window.

- For information on generating reports, see “Using Polaris Standard Reports” in the *Polaris Basics Guide 4.1R2*.
- For detailed descriptions of specific Circulation reports, see “PAC Reports” in the *Polaris Basics Guide 4.1R2*.

Working with Blocks (Stops)

Blocks on patron or item records may interrupt check-out or renewal. When a patron or item is blocked, a block notification message appears. Authorized library staff can override the block and continue with the transaction. System-generated blocks are applied and removed automatically by Polaris. Staff-generated blocks are applied by a staff member and must be manually removed by a staff member. Staff-generated blocks may be library-assigned or free-text blocks. You can also place a blocking note in a patron record.

Blocks may be associated with a patron record or an item record. Patron blocks that a patron my not check out at all or that special conditions, such as a held item, require attention. For example, a block may indicate that a patron’s account is delinquent according to library policies, that the patron requires special services, or that checking out an item would exceed a library-defined limit on certain materials, groups of materials, or reserve items.

Polaris automatically blocks patron records for held items, overdue and long overdue items, money owed over a library-specified amount, accounts in collection, and an excessive number of items claimed. If your library allows self-registration and account updates from the PAC, Polaris blocks patrons with a Verify Patron block, which flags the record for staff review. This block is also placed on patron records created offline. Your library may also place Verify Patron blocks on express registrations created at check-out. To work with patron blocks, see these topics:

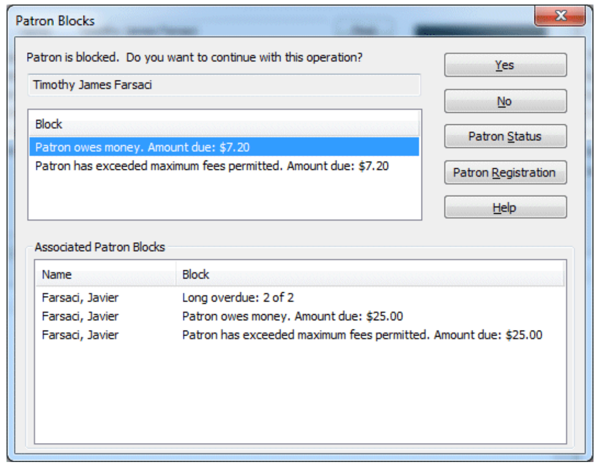
- “Manage patron blocks at circulation” on page 117
- “Resolve a Verify Patron block” on page 118
- “Add a patron block” on page 119
- “Delete a patron block” on page 120

Item blocks, like patron blocks, may indicate that an item should not be checked out at all, or that it requires special handling. These include blocks for non-circulating items and items that are being held for another patron, belong to another library, or have a status other than In, such as On Order, In-transit, Missing, Lost, or Withdrawn. Polaris also blocks items that have notes, are chargeable, or items that were created on-the-fly. To work with item blocks, see these topics:

- “Manage item blocks at circulation” on page 121
- To add blocks to an item record, see “Creating Item Records” in the *Polaris Cataloging Guide 4.1R2*.
- To charge for checking out specified material types and optionally charge for renewing them, see “Charging for Checkout and Renewal” in the *Polaris Patron Services Administration Guide 4.1R2*.

Manage patron blocks at circulation

When you check out or renew items for a patron, the Patron Blocks dialog box appears if there are one or more blocks on the patron record or on associated records with a blocking relationship. You must take action before you check out the next patron. Follow these steps to manage patron blocks at circulation.



1. Do one of the following actions:
   - To override the blocks and continue the transaction, click **Yes** (or press **Y**).

     You must have the appropriate permissions to override blocks. See "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*.

     Note:
     If the patron account has been sent to a collection agency and you do not have permission to override the block, the block is marked by a yellow alert icon . To override this block, you must have the specific permission **Override collection agency block: Allow**. (In this case, the icon is not displayed.)

     If the only block is for a held item, you can override the block without special permission.
   - To stop the transaction, click **No** (or press **N**).
   - Select a block to manage and go to step 2. You can use the up and down arrow keys to select a block.

Tip:
You can click **Patron Status** or **Patron Registration** on the Patron Blocks dialog box to open these workforms, regardless of which block is selected.

2. With the block selected, press **Enter**.

   The appropriate workform opens. For example, if the block is **Patron owes money**, the Patron Status workform - Account view opens. For Verify Patron blocks, the Patron Registration workform opens. For associated patron blocks, the Patron Status workform for the associated patron opens.

3. Resolve the block as necessary (or exit the workform and click **No** on the Patron Blocks dialog box to stop the transaction):
   - For overdue or long overdue blocks, check in the items, make claims, or declare the items lost. See “Doing Normal Item Check-Ins” on page 123, “Working with Claims” on page 153, or “Managing Lost Items” on page 158.
   - For amounts owed, resolve the charges. See “Processing Charges and Payments” on page 179.
   - For Verify Patron blocks, verify the patron’s account information and save the patron record. See “Resolve a Verify Patron block” on page 118.
   - For unread patron messages, an alert message appears in the Patron Blocks dialog box. You can continue the check-out operation or cancel it, and you can also click the block text to open the Patron Status workform - Notes view. The alert message does not place any blocks on patron activity in the PAC. For more information about patron messages, see “Posting Patron Messages” on page 47.
   - Delete staff-generated blocks or blocking notes if appropriate. See “Delete a patron block” on page 120.

Resolve a Verify Patron block

Your library may allow patrons to register online through the PAC. The patron receives a temporary barcode to use for placing requests, and a new patron record is created with a Verify Patron block. This block alerts staff that the record needs to be reviewed and a permanent barcode assigned. An automatic e-mail message alerts designated library staff members that a patron has self-registered. A similar process occurs if your library allows patrons to update their account information through the PAC. Your library may also place a Verify Patron block on patron records created through express registration, and on registrations renewed through Polaris ExpressCheck. Patron records created offline also receive a Verify Patron block. Follow these steps to review a new or updated record, modify it if necessary, and resolve the block.

1. Display the patron’s record in the Patron Registration workform, using one of the following methods:
   - Highlight the **Verify patron** message in the Patron Blocks dialog box, and press **Enter**.
   - On the Polaris Shortcut bar, select **Patron Services**, **Patron Records** to find and open the record. See “Find patron services and related records” on page 14.

     Note:
     The temporary barcodes that are created when patrons self-register begin with **PACREG**.

2. If necessary, type or scan a valid patron barcode in the **Barcode** box.

3. If you want to change the patron code, select another code in the **Patron code** box.
4. If you want to change the statistical code, select another code in the **Statistical class** box.
5. Make any additional settings, such as **Expiration Date**, that your library may require.
6. Select **File, Save** to save the record.

   The Verify Patron block message appears.
7. Click **Remove Block**.

   The record is saved, and the block is removed.

> **Note:**
> You can also delete the Verify Patron block from the Patron Status workform - General view at any time. See "Delete a patron block" on page 120.

Related Information

- **Verify Patron Data report** - Run the Verify patron Data report to list patrons with Verify Patron blocks. See "Patron Services Reports" in the *Polaris Basics Guide 4.1R2*.
- **Express registration block** - A Polaris Administration setting controls whether a Verify Patron block is placed on a patron record created through express registration. See "Setting Express Registration Defaults and Requirements" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Setting Polaris to permit patron self-registration and updates** - See "Setting Up Patron Account Access" in the *Polaris Public Access Administration Guide 4.1R2*.

Add a patron block

You can manually add library-defined blocks to a patron record. Authorized staff can also create free-text blocks. Follow these steps to add a block to a patron's record.

> **Note:**
> You can also add a blocking note to a patron record. Blocking notes block the patron at normal check-out and renewal. See "Create or edit a patron status note" on page 33.

1. Display the patron's record in the Patron Status workform - General view. See "Find patron services and related records" on page 14.

   The General view includes a list of current blocks. The blocks may be staff-generated or system-generated, such as those for overdues.
2. Click **Add** to display the Patron Block dialog box.

3. Add a library-assigned or free-text block:
   - To add a library-assigned block, such as **Address Correction Required** or **See Supervisor**, click **Library assigned** and select a block in the **Library assigned** box.

     Note:
     The available blocks and the order in which they are listed are defined for the library in Polaris Administration. See "Defining Patron Block Descriptions" in the *Polaris Patron Services Administration Guide 4.1R2*.

   - To add a free-text block, click **Free text** and type a block description in the **Free text** box (255 characters maximum).

4. Click **OK** on the dialog box.

   The General view appears, and the new block appears in the Block Description list.

   Note:
   The Block Description list shows only one line of a free-text block. If the block text is too long to display on one line, you can place the cursor over the line. The entire block text is displayed in a tooltip.

Delete a patron block

You cannot edit blocks. However, authorized library staff can manually delete staff-generated blocks. You must select and delete one block at a time. You can also delete a blocking note from the patron record. Follow these steps to delete a patron block from a patron's record.

Note:
Polaris automatically deletes system-generated blocks when the particular blocking conditions are no longer met. For example, when an overdue item is checked in, the overdue block is deleted.

1. Display the patron's record in the Patron Status workform - General view. See "Find patron services and related records" on page 14.
2. For staff-generated blocks, follow these steps:

   a) Select the block that you want to delete in the Block Description list.

   You cannot delete system-generated blocks, such as for overdues.

   b) Click **Delete Block**.

   The block is removed from the list.

3. To delete a blocking note, follow these steps:

   a) Select **View, Notes**, or click  .

   b) Select the text in the **Blocking** note field, and press **DELETE**.

Manage item blocks at circulation

At check-out, renewal, or check-in, the Item Blocks dialog box appears if there are any blocks on the item record. You must take action before you can enter the next item barcode.

Occasionally you may encounter an item with a status of On-Order at circulation. If an item has a status of On-Order and it is linked to a purchase order or invoice line item, a message is displayed. You cannot override the block, and you cannot manually change the status in the item record. The item must be received through Polaris Acquisitions before it can circulate.

Note:
If an item has a status of On-Order, but it is not linked to a purchase order or invoice line item, no block message is displayed. This may occur in libraries that do not use the Polaris Acquisitions subsystem. You can check the item in, then circulate the item in the usual way. In addition, in the item record, you can change the item from On-Order to certain selected statuses. For information about opening item records, see "Display item record information" on page 112.

Some circulation item statuses, such as Unavailable or Withdrawn, will prevent an item check-out. In this case you receive an error message, and you must check the item in before you can continue. Follow these steps to manage item blocks at circulation.

1. Do one of the following actions:
   - To override the blocks and continue the transaction, click **Yes** or press **ENTER**.

     Note:
     At checkout or renewal, you must have the appropriate permissions to override blocks. See "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*.
   - To stop the transaction, click **No**.
   - To open the item record workform, double-click the block text or click **Item Record** and go to step 2.
2. Resolve the block as necessary (or exit the workform and click **No** on the Item Blocks dialog box to stop the transaction):

   a) Select **View, Notes and Notices** on the Item Record workform to see an item's notes and blocks.

   Note:
   You must have the permission **Item record: Modify notes and notices** to open this view and delete blocks.

   b) Remove **Library assigned** or **Free text** blocks if appropriate, and save the record.

   Item records with a record status of Deleted or Provisional will also prevent a check-out. In this case a special error message will display. The item should probably not be checked out in any case, and may require special handling. it is best to take appropriate steps to manage the item record.

Check-In

You can check in items by various methods, depending on the situation. For example, you can do a normal check-in for a few items left at the desk, or a bulk check-in of all the items left in a book drop. You can also use the Check In workform to count the number of items that have been used in the library but not checked out.

Note:
3M ebooks cannot be checked in from the staff client. Patrons can check in this econtent from the PAC patron account or the 3M Cloud application, and they are automatically checked in when they expire. For more information about these processes, see "Integrated Econtent in PAC" in the *Polaris Public Access Administration Guide 4.1R2*.

This unit covers the following topics:

Doing Normal Item Check-Ins

When a patron returns an item to the front desk, you typically check in the item in normal mode, using the Check In workform - Normal view. In certain situations, such as when an item does not have a barcode label, you do not have the item in front of you, or the item record was created with a status other than In, you can check it in from the Item Record workform. If you are working with a patron record, you can also check in an item from the Patron Status workform - Items Out view. Whether you check in an item in normal mode, from the item record, or from the Patron Status workform, alerts may appear during processing. For example, an item may have a block on it, or an item may be overdue. When alerts appear, you must decide how the item should be processed.

Note:
If you want to do a quick check-in of many items, such as a load of materials from the book drop, do a bulk check-in. This process eliminates most alerts. See "Doing Bulk Item Check-Ins" on page 134. If you are working with Polaris offline, you can *only* do a bulk check-in.

Shelving Status

If there are no special circumstances, the item's circulation status changes immediately to In when you check it in, although it may not be returned to the shelf for several hours. This can be confusing for a patron who finds the item in PAC, notes that it is In, but cannot find it because it is still on the book truck. Your library can set a period during which the checked-in item's In status is displayed as Shelving, or another description. See "Setting Shelving Status" in the *Polaris Patron Services Administration Guide 4.1R2*. For that period, the shelving status description is displayed for the item in the PAC, Find Tool search results, the PAC preview in the bibliographic record, and the list of linked items available from the bibliographic record or any linked item record. You can limit Find Tool item searches by shelving status.

Free Days at Check-In

When an overdue item is checked in, free days are days omitted from the overdue fine calculation so that patrons are not charged for overdues when the library is closed. You can set special free days for normal and bulk check-in. For example, if the library was unexpectedly closed for a day due to a storm, you might permit one or two free days. The default values for normal and bulk free days are set in Polaris Administration. When you set a different number of free days for check-in, it applies *only* to your current check-in session. To set free days, you must have the Circulation permission **Modify free days: Allow**. See “Setting Circulation Permissions” in the *Polaris Patron Services Administration Guide 4.1R2*.

Floating Collections and Check-In

Your library system or certain branches within the system may use floating collections, where certain items remain at the branch where they were last checked in. If an item is called to another branch, for example to fill a hold request, the item will stay at that branch when it is returned. The items move among branches as they are used, not according to a rotation schedule.

Floating collection processing takes place at check-in. The process happens automatically; no message is displayed to the staff member when the item floats to its new assigned branch, the check-in branch. The item takes on the circulation parameters of its new assigned branch and remains there until it is checked in at (“floats” to) another branch.

For detailed information about floating collections, see “Setting Up Floating Collections” in the *Polaris Patron Services Administration Guide 4.1R2*.

Check-In Messages and Blocks

The following messages and blocks may appear during check-in.

Check In - Fine dialog box

The Fine dialog box may appear during check-in if there is a fine on the item. See “Resolve a fine at check-in” on page 128.

In Polaris Administration, the Patron Services parameter **Check in: auto-charge fine from item work form and find tool context menu** controls whether overdue fines are automatically charged to the patron account when overdue items are checked in from the Item workform, the Find Tool context menu, or the Patron Status workform - Items Out view. If the parameter is set to **Yes**, the Fine dialog box does not appear. See “Charging

Fines Automatically at Check In" in the *Polaris Patron Services Administration Guide 4.1R2*.

Item Blocks

The Item Blocks dialog box appears during check-in if there are blocks on an item. See "Manage item blocks at circulation" on page 121.

Holds Messages

The following messages related to holds may appear during check-in (refer to "Working with Hold Requests" on page 206):

- **This item satisfies a hold...Do you want to hold the item?** - You can designate the item to fill the request, or override the request. See "Filling Holds at Circulation" on page 241. If you fill the hold, and you have set up printing for hold slips from this workform, the slip is automatically printed. See "Setting Up Receipt Printing from Workforms" on page 79. You can reprint a hold slip for a held item by checking in the held item a second time, keeping the Held status for the item.
- **Transfer this item to *library* for hold?** - The item fills a hold request for a patron at another library. You can override the hold, or transfer the item. See "Filling Holds at Circulation" on page 241. If you transfer the item, and you have set up printing for in-transit slips from this workform, the slip is automatically printed. See "Setting Up Receipt Printing from Workforms" on page 79.

Resolve Lost/Billed Item Dialog Box

Your library may set this dialog box to appear when an item has been declared lost, but the item is found at circulation. See "Resolve a lost-and-unpaid item at circulation" on page 162 and "Resolve a lost-and-paid item at circulation" on page 163.

Circulation Messages

You may see the following messages related to item circulation:

- **Item does not belong to this branch** - Your library may set this message to appear when an item does not belong to your branch. If you choose to put the item in-transit to the item's assigned branch, and you have set up printing for in-transit slips from this workform, the slip is automatically printed. See "Setting Up Receipt Printing from Workforms" on page 79. If you choose to change the item's status to In and keep the item at your branch, the item's assigned branch does not change to your branch.
- **Item is over your suggested limit** - If your system uses floating collections, this message may appear when you check in a floating item from another branch that exceeds your branch's limits for floating items of this material type associated with the same bibliographic record. You can continue to check in the item and override the limit, if that is your

branch's policy. Alternatively, you choose to put the item in-transit to its home branch, or you can cancel the check-in. For detailed information about floating collections, see "Setting Up Floating Collections" in the *Polaris Patron Services Administration Guide 4.1R2*.

- **Item was withdrawn message** - Displayed when the item has been withdrawn from circulation. You can continue to check in the item, or you can cancel the check-in.
- **Course reserve messages** - If your library uses Polaris course reserves, and an item is on reserve for a course, a message informs you that the item is on reserve. You may also see a message if the reserve item is intended for use in the library only. Click **OK** and put the items in the appropriate areas for reserve items. See "Managing Course Reserves" on page 304.

Do a normal check-in from the Check In workform

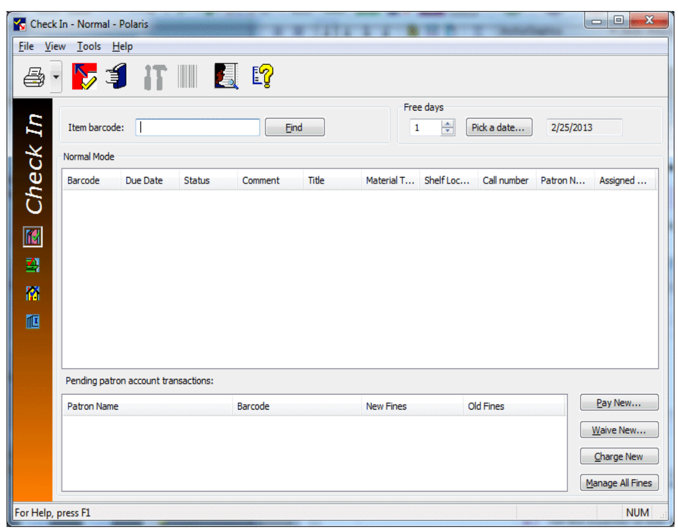
You typically use this method when a patron returns items to the circulation desk. Follow these steps to check in items from the Check In workform - Normal view. (For information on messages or dialog boxes that may appear during check-in, see "Check-In Messages and Blocks" on page 124.)

Important:
For the first time after installation only, you need to set up Polaris to print receipts and slips from the current workform. See "Setting Up Receipt Printing from Workforms" on page 79.

Tip:
If your library includes a title column in the list of items checked in, and a checked-in item is a serial, the serial designation (enumeration and chronology) is added to the title. You may need to expand the title column to see the designation.

1. Select **Circulation, Check In** on the Polaris Shortcut Bar, click , or press **F2**.

   The Check In workform - Normal view opens.



2. Set the number of free days in the **Free days** box or click **Pick a date** and select a date from the calendar, if you want to use a value different from that shown. See "Free Days at Check-In" on page 124.

When you select a date from the calendar, the system automatically calculates the number of free days. The date box shows the effective date of the check in with free days applied.

Tip:
If you are checking in a number of items, some with barcodes and some with RFID tags, group the items so that you check in all of one type, then all of the other. This method is faster than repeatedly switching between the barcode scanner and the RFID reader.

3. Enter item information using one of the following methods:
   - Scan the item barcode in the **Item barcode** box, or type the barcode and press **ENTER**. If you use RFID tags as well as barcodes, this method does not set the security bit for RFID items.
   - Select **Tools, RFID Check In** (or press **F9),** and place up to 10 items on the antenna tray. This method sets the security bit for each item.

     Note:
     You must select **Tools, RFID Check In** or press **F9** for each batch of items you place on the RFID antenna tray.
   - To find an item without a working barcode, click the **Find** button next to the **Item barcode** box to display the Polaris Find Tool and search for the item record.

   The item barcode, due date, status, and comments appear in the list of items checked in. Through settings in Polaris Administration, your library may also choose to display the item's title, material type, shelf location, call number, assigned branch, and/or the borrower's name. See "Setting Up the Check In Workform" in the *Polaris Patron Services Administration Guide 4.1R2*.

4. Repeat the previous step until you have checked in all the items.

   Note:
   Your library may allow you to view the item's last or current borrower. Right-click the item, and select **Links, Last borrower** or **Current borrower** from the context menu. The Patron Status workform for the patron's record appears. The Polaris Administration setting **Last use patron display** controls this function. See "Displaying an Item's Last Borrower" in the *Polaris Patron Services Administration Guide 4.1R2*.

   The status bar displays the total number of items checked in.

5. If you want to print a check-in receipt, follow these steps:

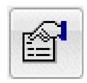
   a) Select the items that should appear on the receipt.

   b) Select **File, Print, Check in Receipt**.

   If items are selected from multiple patrons, the items are grouped by patrons, and three blank lines are added at the end of each group. If auto-cut receipt printing is enabled, the receipt is cut at the end of each patron's group of items. (Items with no patron information, for example those that went from In to In at check in, are also grouped together and separated from patron items.) The information that appears on the receipt is set in Polaris Administration. See "Set check-in receipt options" in the *Polaris Patron Services Administration Guide 4.1R2*.

   Note:
   The requesting patron's name is not printed on the receipt when an item becomes held at check in.

Related Information

- **Check-in from the Patron Status workform** - You can check in an item from the Items Out view of the Patron Status workform. Right-click the item, and select **Check In** from the context menu.
- **Check-in from the Item Record workform** - Select **Tools**, **Check In**, click , or press **CTRL+I**.
- **Modifying a checked-in item** - See "Change item information or barcode at check-in" on page 132.
- **Viewing check-in data for an item** - The Item Record property sheet displays check-in data, including the transaction time, workstation, and logged-in user. Right-click the item in a list view (such as the Find Tool results list), and select **Properties** from the context menu. Or, on the Item Record workform, select  on the toolbar.

Resolve a fine at check-in

Fines for overdues, if any, are calculated automatically. When you attempt to check in an overdue item, a Fine dialog box indicates that a fine is being charged. The fine amount in the dialog box shows an amount related to the item you are checking in. The dialog box also warns you if the patron owes additional money not related to this item.

Follow these steps to pay, waive, or charge a fine to a patron's account when you check in an overdue item.

Note:
In Polaris Administration, the Patron Services parameter **Check in: auto-charge fine from item work form and find tool context menu** controls whether overdue fines are automatically charged to the patron account when overdue items are checked in from the Item workform, the Find Tool context menu, or the Patron Status workform - Items Out view. If the parameter is set to **Yes**, the Fine dialog box does not appear. See "Charging Fines Automatically at Check In" in the *Polaris Patron Services Administration Guide 4.1R2*.

1. (Optional) Change the amount of the fine, if necessary, by typing a new amount in the **Fine** box (maximum $2,000,000.00).

   Note:
   To change the fine amount, you must have the Circulation permission **Modify fine amount: Allow**. See "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*.

2. Choose one of the following options:
   - To check in the item and confirm that the patron owes money, but you will process the fine later, click **Continue**.

     The fine appears in the **Pending patron account transactions** list. Each entry in this list displays the total amount of all fines for that patron. (If one patron has returned several overdue items, it does *not* list each individual fine.) Before you can close the Check In workform, you must resolve each patron's fine by paying, waiving, or charging the patron's account (see step 4).

- To check in the item and waive the fine, click **Waive**.

  A record of the waiver appears in the Transaction Summary box for the patron account (see "Display a transaction's history" on page 177). If you set Polaris for fine receipt printing at the Check In workform, a fine receipt prints (see "Setting Up Receipt Printing from Workforms" on page 79).

  Note:
  Your library may suppress fine receipts for waive transactions. See "Set fine receipt options" in the *Polaris Patron Services Administration Guide 4.1R2*.

- To check in the item and charge the fine to the patron's account, click **Charge Account**.

  The charge is listed on the Patron Status workform - Account view, where you can pay or waive the charge later. See "Processing Charges and Payments" on page 179.

Tip:
To resolve all charges on the patron account, both old and new, click **Manage All Fines**. See step 7.

3. If you clicked **Continue**, and you are ready to process the fine, select the patron line item in the **Pending patron account transactions** list.

4. If you want to *charge* the selected line item to the patron's account, click **Charge New** on the right side of the **Pending patron account transactions** list.

   The line item no longer appears in the list. The charge appears on the Patron Status workform - Account view, where you can resolve the charge later. See "Pay charges from the Account view" on page 180.

5. If you want to *pay* the selected line item, follow these steps:

   a) Click **Pay New** on the right side of the **Pending patron account transactions** list.

   Note:
   If your library uses Active Payment Manager (Class Point of Sale) to manage payments, the Class Point of Sale window opens. Follow your library's procedures to process the payment.

   The Pay dialog box appears.

   b) Type the amount to pay in the **Amount** box (maximum $2,000,000.00), if you are paying an amount other than the exact amount of the line item:

   - **Partial payment** (less than the line item amount) - If the line item represents a single charge, the payment will be recorded as a partial payment on the charge, and the Account Transaction list in the patron's record will show a balance for the charge. If you are making a partial payment on multiple charges, the payment amount is applied to the oldest charges first. See "Pay charges from the Account view" on page 180.

- **Overpayment** (more than the line item amount) - If your library allows overpayments to be recorded as account credits, a dialog box appears that alerts you to the overpayment and provides the choice of crediting the account or not. Click **Yes** to credit the patron's account. Click **No** to pay the charge without recording a credit. (Click **Cancel** if you entered the wrong amount.) If your library does not allow overpayments to be recorded as credits, a message indicates how much change you should give the patron. Click **OK** on the message box.

c) Select a payment method in the **Method** box, and click **OK**.

> **Note:**
> If your library accepts credit card payments, and the patron wants to pay with a credit card, select **Credit card** in the method box. For more information about taking credit card payments, see "Take credit card payments for fines and fees - PayPal Payflow Pro" on page 188 or "Take payments for fines and fees - Comprise SmartPAY" on page 190.

The line item no longer appears in the list. However, a record of the charge and payment appears in the Transaction Summary dialog box for the patron account. If any charges were only partially paid, or if an overpayment was credited, the transactions appear in the Account Transaction list for the patron account. See "Viewing Patron Financial Accounts" on page 174 and "Processing Charges and Payments" on page 179.

If you set Polaris for fine receipt printing at the Check In workform, a fine receipt prints. You can also opt to print the fine receipt only for patrons who do not receive eReceipts. See "Setting Up Receipt Printing from Workforms" on page 79.

6. If you want to waive the selected line item, follow these steps:

a) Click **Waive New** on the right side of the **Pending patron account transactions** list.

The Waive dialog box appears.

b) Type the amount to waive in the **Amount** box (maximum $2,000,000.00), if you are waiving an amount other than the exact amount of the line item:

- **Partial waive** (less than the line item amount) - For a partial waive on a single charge, the transaction will be recorded as a partial waive on the charge, and the Account Transaction list in the patron account will show a balance for the charge. If you are making a partial waive on multiple or all charges, the waived amount will be applied to the oldest charges first. See "Waive charges from the Account view" on page 182.
- **Distributed waive** - If you want to apply the same waived amount to *each* of multiple charges, select (check) the **Distributed Waive** check box, and type an amount to waive. If your library does not allow distributed waives, this option is not available for selection.

Note:
If the distributed waive amount is identical to a charge, the charge is cleared. Charges less than the distributed waive amount are not affected.

The line item no longer appears in the list. However, a record of the waiver appears in the Transaction Summary dialog box for the patron account.

c) Click **OK** on the dialog box.

If you set Polaris for fine receipt printing at the Check In workform, a fine receipt prints. You can also opt to print the fine receipt only for patrons who do not receive eReceipts. See “Setting Up Receipt Printing from Workforms” on page 79.

Note:
Your library may suppress fine receipts for waive transactions. See “Set fine receipt options” in the *Polaris Patron Services Administration Guide 4.1R2*.

7. To resolve other charges on this patron’s record, click **Manage All Fines** on the right side of the **Pending patron account transactions** list.

   The Patron Status workform - Account view opens. For information about working with patron accounts, see “Patron Status and Accounting” on page 165.

Related Information

- **Fine calculation** - Polaris Administration settings control how fines are calculated. See “Defining Fines and Fees” in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Fine receipt information** - The information printed on fine receipts is determined by Polaris Administration settings. See “Set fine receipt options” in the *Polaris Patron Services Administration Guide 4.1R2*. With the appropriate permission, you can also modify the message printed on check-out and fine receipts. See “Set receipt printer message text” on page 84.
- **Working with patron accounts** - See “Patron Status and Accounting” on page 165.
- **Active Payment Manager (Class Point of Sale)** - See “Using Class Point of Sale with Polaris” in the *Polaris Patron Services Administration Guide 4.1R2*.

Change item information or barcode at check-in

Your library may allow you to change an item’s collection, shelf location, material type, circulation status, blocks, non-public note, or barcode from the Check In workform. To be eligible for these changes, the item’s circulation status must be In, and the item’s assigned branch must the same as your workstation’s logged-in branch. Follow these steps to make these changes.

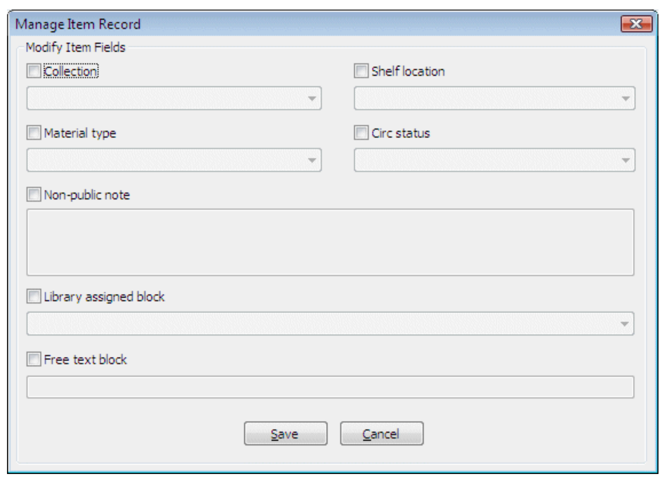
Note:
You cannot change ILL items, course reserve items, quick circ items, or items whose records are locked (open). You can change on-the-fly (OTF) items, but the OTF block remains on the item.

Tip:
You can also change a new shelf-ready item’s information from the Receive Shipment workform. See "Checking In New Shelf-Ready Items" on page 137.

1. In the Check In workform list view, select the item or items you need to change.
2. To change the circulation status, shelf location, library-assigned block, free-text block, non-public note, material type, or collection, follow these steps:

   a) Select **Tools, Manage Item**, click , or press **CTRL+M**.

   The Manage Item Record dialog box opens.



   b) Select the check boxes for the fields you want to change, and select the new options from the lists. You can type information in the **Non-public note** and **Free text block** fields.

   Note:
   For the **Non-public note** and **Free text block** fields, you can select only one item at a time.

   Example:
   You can change the circulation status to **Bindery**, **In-repair**, **Unavailable, Missing,** or **Withdrawn**. If an item is damaged and you want to put it aside for repairs, you can select **In-repair**.

3. Click **Save**.

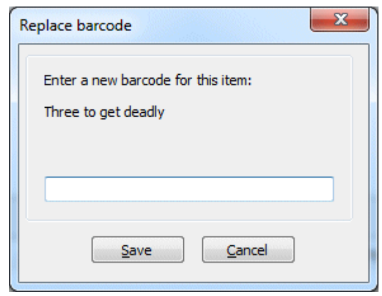
The dialog box closes, and the item record is updated with your changes.

4. To change the barcode, follow these steps:

Note:
You can select only one item at a time to change the barcode.

a) Select **Tools**, **Replace Barcode**, click , or press **CTRL+B**.

The Replace Barcode dialog box opens.



b) Type or scan the new barcode in the box.

The new barcode cannot be blank.

c) Click **Save**.

The dialog box closes, and the item record is updated with your change.

Doing Bulk Item Check-Ins

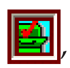
Use the bulk check-in process when you want to do a fast check-in of many items, such as those left in the book drop. Items are processed more quickly because most blocks and dialog boxes do not appear. For example, overdue fines are charged automatically to patron accounts. However, your library can set Polaris to generate alert messages for hold requests, held items, and ILL items during bulk check-in. See "Set Holds options: Alerts, blocks, due dates" in the *Polaris Patron Services Administration Guide 4.1R2*. You may also see an alert message if an item does not belong to your branch. See the procedure "Check in items in bulk" on page 134.

Note:
Offline check-in is also a bulk check-in process. Patron accounts are automatically charged for overdue fines. For more information about offline circulation, see "Managing Offline Circulation" in the *Polaris Patron Services Administration Guide 4.1R2*.

Check in items in bulk

Follow these steps to check in many items quickly, in bulk mode.

1. Select **Circulation, Check In** from the Polaris Shortcut Bar to display the Check In workform.

2. Click , or select **View, Bulk Mode**.

   The Check In workform - Bulk view appears.

Tip:
You can make the Check In workform open to this view by default. Select **View, Save Current View as User Default**.

Tip:
If your library includes a title column in the list of items checked in, and a checked-in item is a serial, the serial designation (enumeration and chronology) is added to the title. You may need to expand the title column to see the designation.

Tip:
If you are checking in a number of items, some with barcodes and some with RFID tags, group the items so that you check in all of one type, then all of the other. This method is faster than repeatedly switching between the barcode scanner and the RFID reader.

3. Set the number of free days in the **Free days** box or click **Pick a date** and select a date from the calendar, if you want to use a value different from that shown. See "Free Days at Check-In" on page 124.

   When you select a date from the calendar, the system automatically calculates the number of free days. The date box shows the effective date of the check in with free days applied.

4. Enter item information using one of the following methods:
   - Scan the item barcode in the **Item barcode** box, or type the barcode and press **ENTER**. If you use RFID tags as well as barcodes, this method does not set the security bit for RFID items.
   - Select **Tools, RFID Check In** (or press **F9**), and place up to 10 items on the antenna tray. This method sets the security bit for each item. You must select **Tools, RFID Check In** or press **F9** for each batch of items you place on the RFID antenna tray.

- To find an item without a working barcode, click the **Find** button next to the **Item barcode** box to display the Polaris Find Tool and search for the item record.

  Note:
  A Polaris Administration setting (Patron Services parameters - **Check-in: Prompt for in-transit in bulk mode**) controls whether a prompt appears when you check in an item that belongs to another branch. If the parameter setting is **No**, no prompt appears and the item's status automatically changes to In-transit to the other branch. (If you set Polaris for in-transit slip printing at the Check In workform, then an in-transit slip prints. See "Setting Up Receipt Printing from Workforms" on page 79.) If the parameter setting is **Yes**, you can choose to change the item's status to In-transit or In. However, if you choose to change the item's status to In and keep the item at your branch, the item's assigned branch is *not* changed to your branch.

The item barcode, due date, status, comments, and fine charged to the borrowing patron, if applicable, appear in the list of items checked in. Your library may also choose to display the item's title, material type, and/or the borrower's name. See "Setting Up the Check In Workform" in the *Polaris Patron Services Administration Guide 4.1R2*.

5. Repeat the previous step until you have checked in all the items.
6. If you want to print a check-in receipt, follow these steps:

a) Select the items that should appear on the receipt.

b) Select **File, File, Check in Receipt**.

If items are selected from multiple patrons, the items are grouped by patrons, and three blank lines are added at the end of each group. If auto-cut receipt printing is enabled, the receipt is cut at the end of each patron's group of items. The information that appears on the receipt is set in Polaris Administration. See "Set check-in receipt options" in the *Polaris Patron Services Administration Guide 4.1R2*. This option is not available for offline check-in.

Related Information

- **Resolving fines** - To work with a patron's fines, you must use the Patron Status workform - Account view. See "Viewing Patron Financial Accounts" on page 174.
- **Bulk Check In workform columns** - See "Setting Up the Check In Workform" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Messages** - During bulk check-in you may see the following:
  - **This item satisfies a hold...Do you want to hold the item?** - A Polaris Administration setting controls whether this message displays, or whether holds are trapped automatically. You can fill or override the request. If you override it, a message asks if you want to reactivate the hold request for the patron whose hold request was overridden. If you fill the hold, and you have set up printing for hold slips from this workform, the slip is automatically printed. See "Setting Up Receipt Printing from Workforms" on page 79.
  - **Resolve lost/billed item dialog box** - This dialog box appears when an item has been declared lost, but the item is found at circulation. See "Managing Lost Items" on page 158.
- **Modifying selected check-in items** - See "Change item information or barcode at check-in" on page 132.

Checking In New Shelf-Ready Items

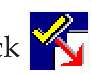
If your library sends enriched EDI orders using Polaris Acquisitions and receives shipments of shelf-ready barcoded materials, you can scan the items when they are received at the loading dock to check them in so they can be circulated, and update the linked purchase orders at the same time. Your library system may check in and receive new items by this method at a central location, or each branch may process its own new shelf-ready items.

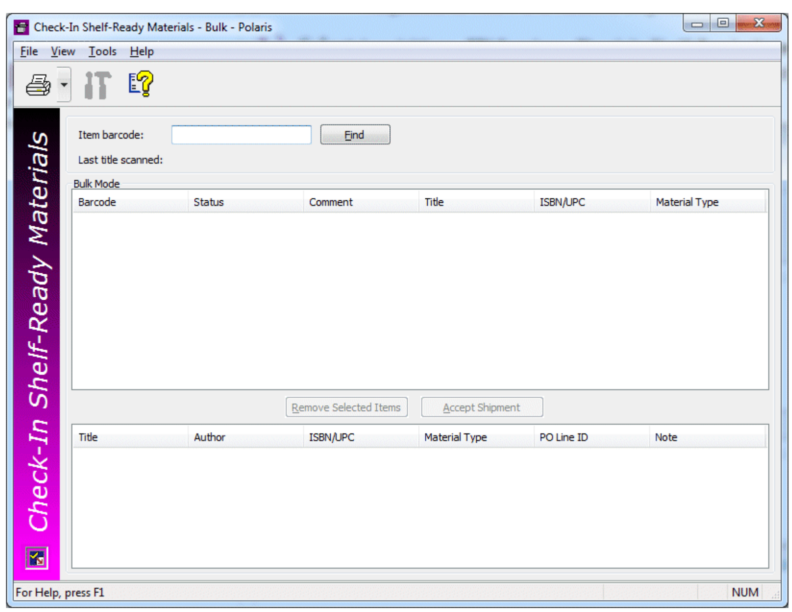
To check in a shelf-ready item by this method, the matching on-order item record must have a barcode, and it must be linked to a purchase order line item segment. On-order items are created when the purchase order is released and are updated with embedded holdings data when full bibliographic records are imported using the Enriched EDI Orders import profile. For more information about these processes, see "Acquisitions Topics" in the *Polaris Acquisitions Guide 4.1R2*.

Check in new shelf-ready items

Follow these steps to check in new items when a shipment of shelf-ready items arrives at your processing location.

> **Note:**
> To do this procedure, you need the Acquisitions permissions **Access Acquisitions: Allow** and **Receive Shipment: Allow**.

1. Select **Acquisitions, EDI Services, Check In Shelf-Ready Materials** or click  on the Polaris Shortcut Bar to display the Check-In Shelf-Ready Materials workform.



2. If you will print hold or in-transit slips from this workform, select **Tools, Options** and set up receipt printing. See “Setting Up Receipt Printing from Workforms” on page 79.

   You need to do this step only once for this workform. If receipt printing has already been set up, skip this step.

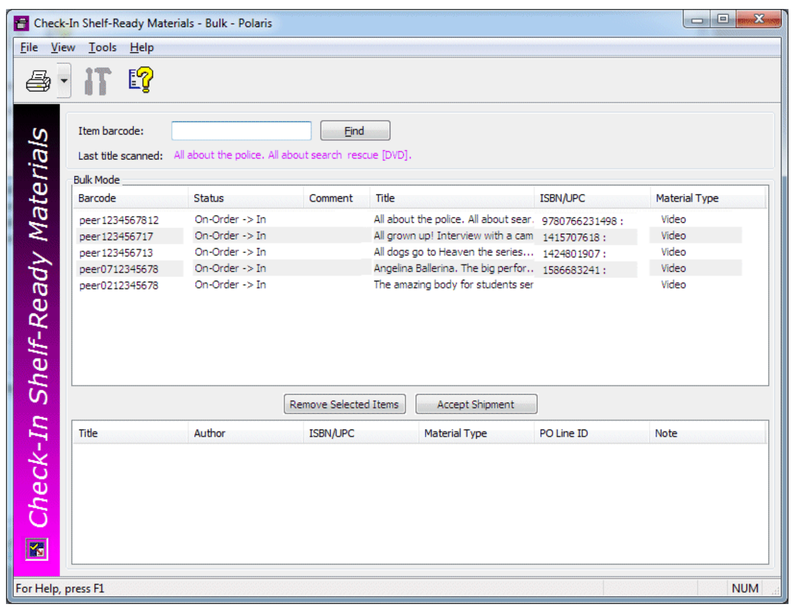
3. Scan or type the barcode of the first item in the **Item barcode** box and press **ENTER**.

   The system automatically finds the barcode of the matching on-order item record, and the item is listed in the top section of the workform.

   Note:
   If the item’s barcode label is damaged, you can also click **Find** to search for the on-order item record, but the record must have a barcode to be checked in on this workform.

4. Continue to scan items in the shipment.

   As the items are scanned and checked in, they are listed in the top section of the workform.



As the items are checked in, each item’s circulation status is updated appropriately (for example, to In, In Transit, or Held). If you have the appropriate permissions, you can change item information (collection, shelf location, material type, blocks, or non-public note) while it is displayed in the top part of the workform. See “Change item information at Shelf-Ready Materials check-in” on page 141.

If items that fill hold requests or items that belong at another branch are checked in, and you have set receipt printing (see step 2), the appropriate holds slips or in-transit slips are printed. Depending on your library’s settings in Polaris Administration, you may also see messages alerting you that an item has holds, or that it should go to another branch. Click **OK** to acknowledge the message and continue scanning items.

If you receive error messages for no matching item records or other conditions, set the problem items aside and alert the technical services staff.

Note:

If you have entered barcodes in error, you can select the item or items in the list and click **Remove Selected Items**. The items are removed from the list. At this point the items have been checked in but not received. Technical Services staff can run the Acquisitions report Shelf Ready Items Not Received in Acquisitions to identify these items and resolve their status.

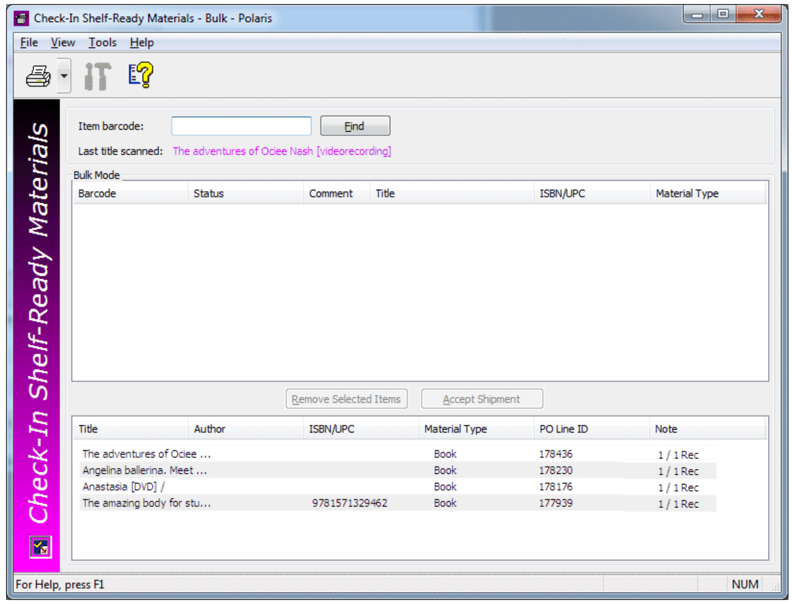
If you have scanned the same item twice, you can ignore the error. The item is checked in only once.

5. After the barcodes for all the items in the shipment have been scanned or entered, click the **Accept Shipment** button.

Important:
Try to scan all the barcodes for all the items in a single shipment before clicking **Accept Shipment**. This reduces the number of purchase order line item segments that are split into two segments—one for the copies received and one for the copies still on-order—and therefore makes further processing easier.

The scanned items appear in the bottom portion of the workform and the status of the linked purchase order line item segments is changed to Received. The **Note** column indicates how many copies were ordered and received.

Note:
You may notice that the ISBN/UPC number for an item differs in the top and bottom part of the workform. This is because the number in the top view comes from the linked bibliographic record, but the information in the bottom portion comes from the purchase order line item. The data in the purchase order line item reflects the material ordered from the vendor, so the ISBN or UPC number in this column should match what is on the physical item.



A log report is saved in the database when the shipment is received. Your library's technical services staff reviews the report for problems. See "Acquisitions Reports" in the *Polaris Basics Guide 4.1R2*.

Related Information

- **Alert messages** - Checking in shelf-ready materials is a bulk check-in process. Alert messages for hold requests during bulk check-in are set in Polaris Administration. See "Set Holds options: Alerts, blocks, due dates" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Check-In Shelf-Ready Materials columns** - Some columns are optional, and your library can set what information should be displayed. These are the same settings used by the Bulk Check In workform. See "Setting Up the Check In Workform" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **EDI ordering** - See "Ordering" in the *Polaris Acquisitions Guide 4.1R2*.
- **Enriched EDI orders** - See "Enriched EDI Orders and Shelf-Ready Items" in the *Polaris Acquisitions Guide 4.1R2*.

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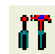
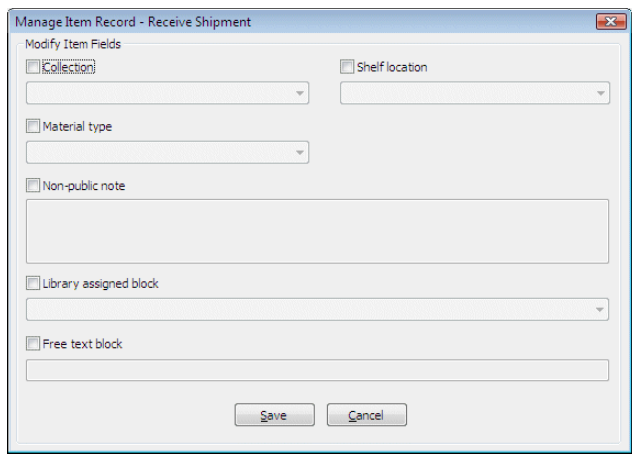
Change item information at Shelf-Ready Materials check-in

Your library may allow you to change an item's collection, shelf location, material type, blocks, or non-public note from the Check-In Shelf-Ready Materials workform. To be eligible for these changes, the item's circulation status must be In, the item's assigned branch must the same as your workstation's logged-in branch, and the item must be be listed in the top part of the workform (that is, it has been checked in but you have not clicked **Accept Shipment**). Follow these steps to make these changes.

1. In the top part of the Receive Shipment workform, select the item or items you need to change.

2. Select **Tools**, **Manage Item**, click , or press **CTRL+M**.

   The Manage Item Record dialog box opens.



3. Select the check boxes for the fields you want to change, and select the new options from the lists. You can type information in the **Non-public note** and **Free text block** fields.

   Note:
   For the **Non-public note** and **Free text block** fields, you can select only one item at a time.

4. Click **Save**.

   The dialog box closes, and the item record is updated with your changes.

Tracking In-House Item Use

If your library tracks statistics for materials that do not circulate, but are used by patrons in the library, you check the items in after use with an in-house check-in process. (The Year-to-date and Lifetime statistics for in-house usage are updated in each item record, but the circulation statistics are not updated.)

Check in items that were used in-house

Follow these steps to check in items that did not circulate, but were used by patrons in the library.

1. Select **Circulation, Check In** from the Polaris Shortcut Bar to display the Check In workform.

Tip:
You can make the Check In workform open to this view by default. Select View, Save Current View as User Default.

2. Click , or select **View, InHouse Mode**.

   The Check In workform - InHouse view appears.

Tip:
If you are working with a number of items, some with barcodes and some with RFID tags, group the items so that you process all of one type, then all of the other. This method is faster than repeatedly switching between the barcode scanner and the RFID reader.

3. Enter item information using one of the following methods:
   - Scan the item barcode in the **Item barcode** box, or type the barcode and press **ENTER**.
   - Select **Tools, RFID Check In** (or press **F9**), and place up to 10 items on the antenna tray. In check-in InHouse mode, security bits are not affected.

     Note:
     You must select **Tools, RFID Check In** or press **F9** for each batch of items you place on the RFID antenna tray.

   Information about the checked-in item appears in the Items Checked In list.

4. Repeat the previous step until you have checked in all the items.

Related Information

- **Viewing item statistics** - To view year-to-date and lifetime in-house usage statistics for an item, open the Item Record workform - Statistics view. The Item Record workform - History view also shows when the item was scanned at in-house check-in.
- **Reporting in-house use statistics** - Run the In-House Use report to see year-to-date and lifetime in-house use statistics for all items, organized by material type. For more information about circulation reports, see "PAC Reports" in the *Polaris Basics Guide 4.1R2*. For more information about running reports, see "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*.

Circulating Ephemeral Items

Using Polaris Quick-Circ, you can circulate items that are not intended for full cataloging and generate circulation statistics for these items. For example, items suitable for quick-circ circulation might include old mass-market paperbacks or pamphlets.

Quick-circ items differ from regular items in that they have no conventional Polaris item records. They circulate with no due dates, no fines, and no overdue processing. They cannot fill hold requests. They do not count against any patron borrowing limits, and they are not displayed in the patron's items out list or in a patron's reading history. A quick-circ item is identified only by a barcode, assigned branch and collection, and material type. The primary advantage of Polaris Quick-Circ is in tracking and reporting circulation of these kinds of items. Quick-circ item circulation is included in many Polaris circulation reports.

This unit covers the following topics:

Creating Quick-Circ Items

You can create quick-circ item records from several locations, including the Polaris Shortcut Bar (**File, New** or **Utilities, Quick-circ Item Records**), the Check Out workform, or an existing quick-circ item record, depending on your workflow. Although quick-circ item records use several of the same data fields as conventional Polaris item records, there are important differences. If a quick-circ item barcode is scanned or entered into the item Find Tool, the search produces no results. The system responds as it does when no matching barcode is found. You cannot bulk-change quick-circ item records, although you can modify individual records.

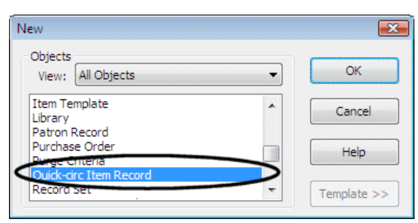
Note:
If a quick-circ item barcode is scanned into the barcode field of a conventional item record, the system displays a message that the barcode is assigned to quick-circ items and cannot be used.

A convenient workflow is to reserve a sheet of barcodes or several barcode labels and create quick-circ item records for the barcodes in advance. Then you can apply the barcodes as needed at check-out. Each physical item needs a unique barcode. However, during staff check-out, you need to scan only one of the barcodes, and specify how many quick circ items are being checked out. (If your patrons use Polaris ExpressCheck, each item needs to be scanned at the Polaris ExpressCheck station.)

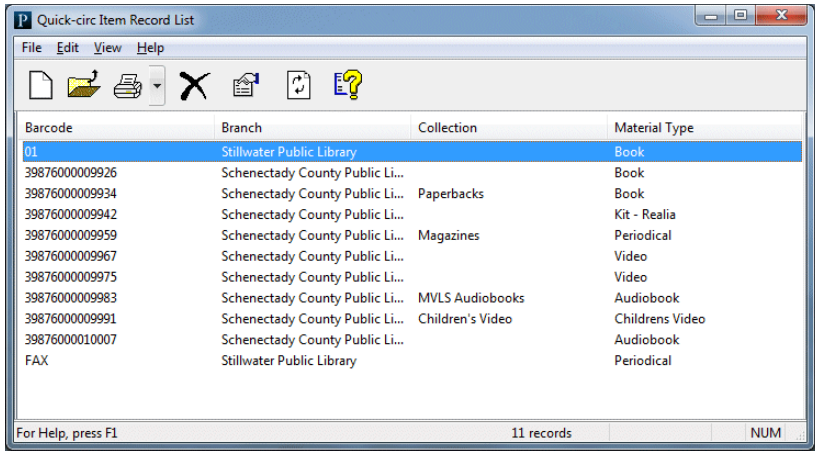
Create a quick-circ item

Follow these steps to create a quick-circ item for circulation.

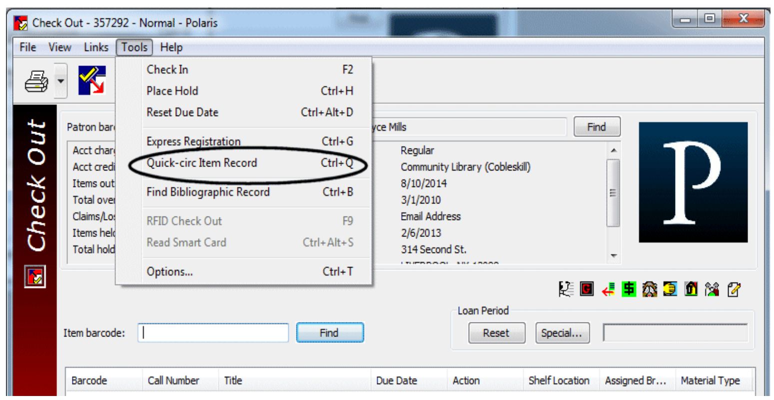
1. Open the Quick Circ Item workform using one of the following methods:
   - From the Polaris Shortcut Bar, select **File, New**, and select **Quick-circ Item Record** from the list of objects.



   - From the Polaris Shortcut Bar, select **Utilities, Quick-circ Item Records**, and select **File, New** from the Quick-circ Item Record List.

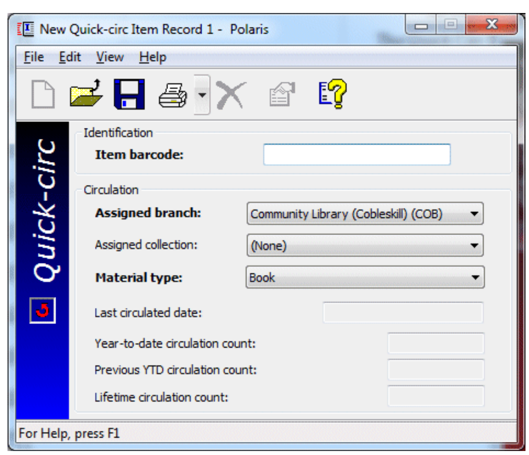


- From the Check Out workform, select **Tools, Quick-circ Item Record** or press **CTRL+Q**.



Note:
From an existing Quick-circ Item workform, select **File, New**. You can copy the existing record exactly, or open a new record with a blank barcode.

The Quick Circ Item workform opens.



2. Scan or type the barcode in the **Item barcode** box.

   For quick-circ items, the system does not check the item barcode format definitions set in Polaris Administration (**Profiles, Staff client**). However, you cannot use a barcode that is already assigned to another quick-circ item or to a conventional item.

3. Select the item's assigned branch.

   The default value is the workstation log-on branch. The available options are the same as those available in the conventional item record. They depend on your branch's settings and your permissions.

4. If your library uses collections, select a collection from the **Assigned collection** list.

   Your library may use specific collections for quick-circ items. For information on setting up collections, see "Working with Collections" in the *Polaris Administration Guide 4.1R2*.

5. Select a material type.

   The default value is set in Polaris Administration. Your policy may be to use any available and appropriate material type for quick-circ items, or you may use one material type for all quick-circ items. You can set up a material type specifically for this use. See "Defining Material Types" in the *Polaris Patron Services Administration Guide 4.1R2*.

6. Select **File, Save**.

Related Information

"Checking Out Quick-Circ Items" on page 148

View, modify, or delete quick-circ items

You cannot search for quick-circ item records with the Polaris Find Tool. However, you can view a list of all the existing quick-circ items and select them from the list to modify or delete them. Follow these steps to work with the list of quick-circ items.

Tip:
You can sort the list by branch. Click the **Branch** column head.

1. Select **Utilities, Quick-circ Item Records** from the Polaris Shortcut Bar.

   The Quick-circ Item Records List opens. The list displays all the quick-circ items in the system.

2. To print the list of items, select the printer icon  on the workform toolbar.
3. To modify an item, double-click the item in the list.

   The Quick-circ Item Record workform opens. You can edit the barcode, assigned branch, assigned collection, and material type of the item. Select **File, Save** when you have made the changes.

4. To delete an item, right-click the item in the list, and select **Delete** from the context menu.

Checking Out Quick-Circ Items

When a quick-circ item barcode is scanned during normal check-out, offline check-out, or check-out from Polaris ExpressCheck, the transaction is recorded as a quick-circ transaction. The system does not check the patron total item limit or item limit by material type, and the patron record is not updated in any way to reflect the transaction. The items do not display in the patron's Items Out list on the Patron Status workform, in the patron's account as viewed in PAC, or in the patron's reading history. However, if the quick-circ items are the *only* items scanned for check-out, the patron's **Last activity date** is updated to the date of the transaction.

Quick-circ items cannot be checked out from an Outreach Services pick list. Also, quick-circ items cannot be *renewed* from the staff client, PAC, Polaris ExpressCheck, or by telephone, because they are not displayed or recorded on the patron's Items Out view.

1-2-3

Check out quick-circ items (staff client)

Follow these steps to check out quick-circ items during normal check-out.

Note:
You can create quick-circ items directly from the Check Out workform. See "Creating Quick-Circ Items" on page 144.

1. Select **Circulation, Check Out** from the Polaris Shortcut Bar to display the Check Out workform.

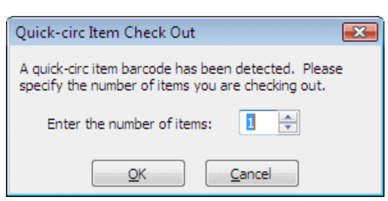
   The Check Out workform is displayed.

2. Enter patron information using one of the following methods:
   - Scan the patron barcode in the **Patron barcode** box, or type the barcode and press **ENTER**.
   - Click the **Find** button next to the **Patron name** box to display the Polaris Find Tool and search for the patron's record.

   The **Patron barcode**, **Patron name**, and other patron information are filled in.

3. Scan a quick-circ item barcode in the **Item barcode** box, or type the barcode and press **ENTER**.

   The Quick-Circ Item Checkout dialog box appears.



4. Type or select the number of quick-circ items to check out.

   The default value is **1**. You can scan each quick-circ barcode individually, or type a greater number to allow one barcode to represent multiple items for statistical purposes.

5. Click **OK**, press **ALT+O**, or tab to the **OK** box and then press **ENTER**.

   Note:
   To cancel, click **Cancel**, press **ALT+C**, or tab to the **Cancel** box and then press **ENTER**.

   The status bar indicates that the check-out was successful. The quick-circ item information appears in the list of items checked out. Each quick-circ item barcode is a separate line item. For each quick-circ line item, the Action column displays the number of items you specified to associate with the quick-circ item barcode.

6. Repeat the previous steps until you have checked out all the patron's items.

   The total number of items checked out appears in the status bar at the bottom of the workform.

7. If you want to print a check-out receipt, follow these steps:

   a) Verify that the **Item barcode** box is blank.

   b) Do one of the following actions:

   - To print a receipt for *all* the items the patron has checked out in this session, press **ENTER**.
   - To print a receipt for *selected* items, select the item or items in the list of items checked out and select **File, Print Receipt, Print Selection**.

   For quick-circ items, one line is printed for each quick-circ barcode scanned. The line text is **X uncataloged items**, where **X** is the number of items you specified to associate with the quick-circ item barcode.

Related Information

- **Offline check-out** - During offline check-out, a barcode must be scanned for each physical quick-circ item. Quick-circ items are logged in the normal offline check-out process. When the offline file is uploaded, each transaction is entered as a quick-circ item check-out, and the offline upload report records the transaction. See "Managing Offline Circulation" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Polaris ExpressCheck check-out** - When a patron checks out a quick-circ item, the screen displays the item material type and **Uncataloged material** in the line item display, with no due date or additional information. The receipt prints one line for each quick-circ item barcode scanned. The library can edit the display text **Uncataloged material**. For more information about customizing Polaris ExpressCheck, see the *Polaris ExpressCheck Administration Guide.*

Checking In Quick-Circ Items

It is not necessary to check in quick-circ items. However, if you want to track quick-circ item check-ins for reporting purposes, you can check them in through normal and bulk check-in, just like conventional items. When a quick-circ item is checked in, the Comments column on the Normal or Bulk Check In workform notes that the item is a quick-circ item. For more information about check-in procedures, see "Check-In" on page 122.

Note:
The status of quick-circ items belonging to other branches does not change to In-Transit at check-in.

Quick-circ items can also be checked in offline. They are logged in the normal offline check-in process. The transaction is recognized as a single quick-circ item check-in during the offline file upload, and the offline upload report records the transaction. For more information about offline circulation, see "Managing Offline Circulation" in the *Polaris Patron Services Administration Guide 4.1R2*.

Quick-circ items are not recognized during in-house or inventory check-in. If a quick-circ item barcode is scanned during these operations, the system displays a message that the item record cannot be found.

Taking an Item Inventory

When you want to take an inventory of items on the shelf, use the Check In workform - Update InventoryDate view. You can inventory items by scanning item barcodes, reading RFID tags, or loading a file of item barcodes generated by another device. After you take the inventory, you can print a shelf list of the inventoried items.

Items are *not* checked in through the Update InventoryDate view. If an item has any status other than In, the workform indicates the problem. You must check in the item through the Check In Normal or Bulk view.

This unit covers the following topic:

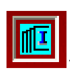
- "Take an inventory" on page 151

Take an inventory

When you scan items during an inventory, the **Last inventory date** field in the item record (Statistics view) is updated. Follow these steps to do an inventory of your items.

Note:
You can also take an inventory while working offline. The offline Update InventoryDate view differs slightly from the online workform view.

1. Select **Circulation, Check In** from the Polaris Shortcut Bar to display the Check In workform.

2. Click , or select **View, Update Inventory Date** to display the Update Inventory Date view.

Tip:
You can make the Check In workform open to this view by default. Select **View, Save Current View as User Default.**

Tip:
If you are working with a number of items, some with barcodes and some with RFID tags, group the items so that you process all of one type, then all of the other. This method is faster than repeatedly switching between the barcode scanner and the RFID reader.

3. Enter item information using one of the following methods:
   - **Scanning barcodes** - Scan the item barcode in the **Item barcode** box, or type the barcode and press **ENTER**.
   - **Reading RFID tags** - Select **Tools, RFID Check In** (or press **F9**), and place up to 10 items on the antenna tray. In check-in Inventory mode, security bits are not affected. You must select **Tools, RFID Check In** or press **F9** for each batch of items you place on the RFID antenna tray.
   - **Loading a file of barcodes** - Select **Tools, Load barcode file**, or press **CTRL+ALT+I**. An explorer window opens, where you can browse to and select the file of barcodes.

Note:
Use this method to load a barcode file generated by another device.

If the item has a status of In, the item barcode, status, title and comments appear in the Update Inventory Date list. If the item has a status other than In, a message appears. When you click **OK**, the Comment column displays the status. You can check in the item through the Normal or Bulk view, or right-click the item in the list and open the item record.

4. Repeat step 3 until you have completed your inventory of items.
5. Run the following reports immediately after the inventory:
   - **Inventory Exception Incorrect Status** - Lists items that had a status other than In during inventory. You specify a call number range and a cut-off date. Set the cut-off date to the day before the inventory date. You can filter the report by organization.
   - **Inventory Exception Misshelved** - Lists items with a status of In that should have been in the inventory sequence but were not. You specify a call number range and a cut-off date. Set the cut-off date to the date you started the inventory. You can filter the report by organization.

     Note:
     To access these reports, select **Utilities, Reports and Notices** on the Polaris Shortcut Bar. In the Report Manager, select **Cataloging, Item**, and double-click the appropriate report. For more information on generating reports, see "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*.

Related Information

- **Inventory Shelf List report** - After you take inventory, you can run this report to list items inventoried. You specify a call number range and an inventory date range. You can filter the report by organization.
- **Last inventory date** - To view the last inventory date for an item, open the Item Record workform - Statistics view. See "Display item record information" on page 112. You can also see when the item was scanned for inventory on the Item Record workform - History view.
- **Polaris Inventory Manager** - You can also take an inventory quickly and conveniently with Polaris Inventory Manager, using a wireless tablet PC and working at the shelves. For more information, contact your Polaris Customer Account Manager.

Working with Claims

You assign a claim status to an item when Polaris shows that an item is out, but the patron claims that she returned the item (Claim Returned) or never had the item (Claim Never Had). Polaris keeps track of a patron's current claims and the total number of claims the patron has ever had.

In Polaris Administration, the library sets limits for current and total claims. If a patron exceeds these limits, circulation is blocked for that patron. See "Set up blocks for claims" in the *Polaris Patron Services Administration Guide 4.1R2*. If you have the appropriate permission, you can reset a patron's total claim count so that the patron record is not permanently blocked. See "Reset a patron's total claims count" on page 155.

A Polaris Administration setting also controls whether fines are charged when an overdue claimed item is checked in or checked out. See "Fines for Claimed Items" in the *Polaris Patron Services Administration Guide 4.1R2*.

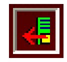
If your library includes items that are declared or billed lost but the overdue fine has not yet been charged, and/or claimed items in the estimated overdue fine calculation on checked-out items, you can estimate these from the Patron Status workform - Claims view. The library may also choose to include these estimated fines in the threshold calculation that determines if a patron should be blocked for overdue fines. For more information about Polaris Administration settings for estimating , see "Calculating and Blocking for Estimated Accrued Fines" in the *Polaris Patron Services Administration Guide 4.1R2*.

This unit covers the following topics:

Make a claim

Follow these steps to assign a claim status to a patron's checked-out item.

Tip:
If an item in the list is a serial, the serial designation (enumeration and chronology) is added to the title. You may need to expand the title column to see the designation.

1. Display the patron's record in the Patron Status workform (refer to "Find patron services and related records" on page 14).
2. Select **View, Items Out** or click  to display the Items Out view.
3. Select the appropriate item or items from the Items Out list, and click  above the list (or press **CTRL+M**). To select more than one item, press **CTRL** and click the items.

   The Make Claim dialog box opens.
4. Select a claim status (**Claim Returned** or **Claim Never Had**) in the **Status** box and click **OK**.

   The Items Out view appears. The item or items no longer appear in the Items Out list because the item status has changed.

   Note:

   To view claimed and lost items, select **View**, **Claims** or click  to display the Patron Status workform - Claims view. You can link to an item record from the Claims view. Right-click the item in the Claims list, and select **Links**, **Item Record**.
5. If a message appears asking if you want to apply the claim status to all selected items, click **OK** to confirm that you want to apply the status.

   Note:
   To resolve a claim, you must check in the item. After the claimed item is checked in, the item no longer appears in the Claims list.

Related Information

- **Claimed Items report -** The Claimed Items report lists Claimed Never Had and Claim Returned items, grouped by the items' assigned branches. Patron information is included for each item. You can filter the report by organization. To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Cataloging** in the Polaris Reports dialog box. For information on generating reports, see "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*.
- **Declare an item lost** - See "Managing Lost Items" on page 158.
- **Including claimed items in estimated fines** - "Calculating and Blocking for Estimated Accrued Fines" in the *Polaris Patron Services Administration Guide 4.1R2*

Reset a patron’s total claims count

Staff members with the appropriate permission can reset a patron’s total (lifetime) claim count to 0. This prevents the situation where a patron record might be permanently blocked for exceeding the total claim limit even when claims have been resolved satisfactorily. Follow these steps to reset a patron’s total claim count.

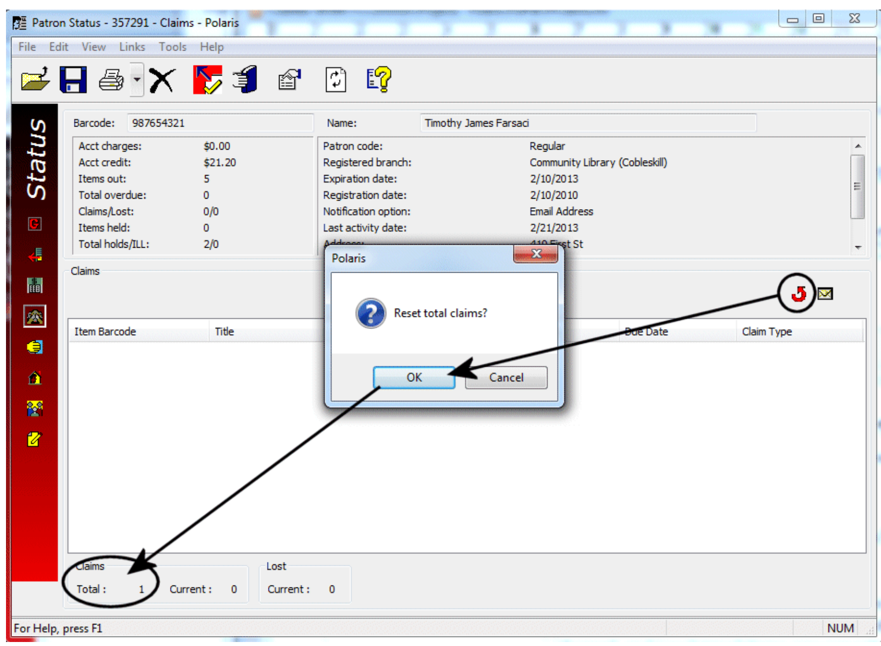
Note:
You need the system-level Circulation permission **Patron claims: Reset total claim count: Allow** to do this procedure.

1. Display the patron’s record in the Patron Status workform (refer to “Find patron services and related records” on page 14).

2. Select **View, Claims** or click  to display the Claims view.

3. Click the Reset total claims icon  above the claims list or press **ALT+C.** The option is not available if the total claims count is 0. The total claims count does not include current claims.

   A confirmation message appears.



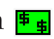
4. Click **OK** on the confirmation message.

   The total claims counter is set to 0. (The current claims count is not affected.)

Estimate fines from the Patron Status workform - Claims view

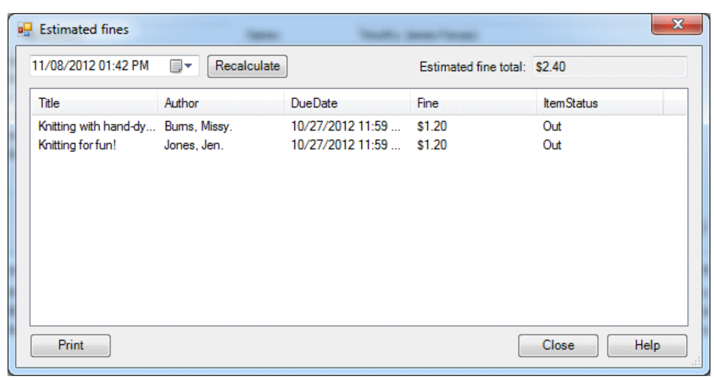
If your library has opted to include items in the estimated fine calculation that are declared or billed lost but the overdue fine has not yet been charged, and/or claimed items, you can estimate for a patron on these items as well as others currently checked out. (The library may also choose to include estimated fines in the threshold calculation that determines if a patron should be blocked for overdue fines. See "Calculating and Blocking for Estimated Accrued Fines" in the *Polaris Patron Services Administration Guide 4.1R2*.) You can estimate for a patron on items that are currently checked out, calculating the fines if the items were returned today or on a date you select.

Follow these steps to estimate fines for a patron from the Patron Status workform - Claims view.

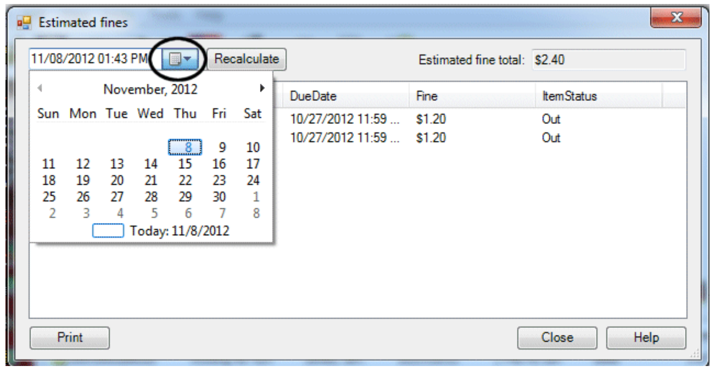
1. Display the patron's record in the Patron Status workform (refer to "Find patron services and related records" on page 14).
2. Select **View, Claims** or click  to display the Claims view.
3. Click the Estimated Fines icon  above the Claims list.

   The Estimated Fines dialog box opens. The dialog box shows the fine on each item and the total estimated fines if the items are returned today.

   Note:
   The displayed amount never exceeds the maximum fine limit per material type set up in Polaris Administration, even if the calculated amount is greater. That is, the patron is never charged more that the maximum fine limit.



4. To view the estimated fines if the items are returned at a future date, click the calendar icon and use the calendar control to set the date; then click **Recalculate**.



5. Click **Print** to print the information on the printer specified for the workstation.

   The information is formatted for a receipt printer and includes the title, author, due date, and estimated fine. Claimed (and lost items, if included in the calculation) are included in the printed information.

Related Information

You can also estimate fines from the Patron Status workform - Items Out view. See "Estimate fines on currently checked out items" on page 168.

Managing Lost Items

You can declare an item lost in the following situations:

- A patron notifies the library that a checked-out item is lost. A bill has not been sent, and the account has not been charged.
- A patron has received a bill for an overdue item, and the patron notifies the library that the item is lost. The patron's account has already been charged, but the charges have not been resolved (paid or waived).

Note:
Your library system may automatically declare billed items lost through a Polaris Administration setting. See "Overdue Fines on Lost Items" in the *Polaris Patron Services Administration Guide 4.1R2*.

Charges for lost items may include the replacement charge, a processing fee, and overdue charge, if any. Your library may or may not place overdue charges on lost items, according to Polaris Administration settings. For more information on setting up policies for overdue charges and replacement charges, see "Defining Fines and Fees" in the *Polaris Patron Services Administration Guide 4.1R2*.

If an item was declared lost, but is later found at check-in, check-out, or renewal, you may resolve any charges connected with the item, or your library may set up automatic processing to manage the charges. See "Setting Lost Item Recovery Defaults" in the *Polaris Patron Services Administration Guide 4.1R2*.

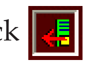
Note:
Lost item reports provide useful statistics about lost items. For information on generating reports, see "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*. For information about specific reports, see "PAC Reports" in the *Polaris Basics Guide 4.1R2*.

This unit covers the following topics:

Declare an item lost

You can manage charges at the time you declare the item lost. Follow these steps to assign a Lost status to a patron's checked-out item.

> **Important:**
> For billed items, if your library system does not automatically declare them lost, use the following procedure to declare the billed item lost and handle the charge at the same time. Although you can pay a billed item from the Patron Status workform -Account view, it is preferable to use the Declare lost item dialog box as described in this procedure, so that you are handling the charge *and* the item. If you simply pay the billed item from the Patron Status workform -Account view, then the item is not removed from the Items Out list, and the item status is not changed to Lost.

1. Display the patron's record in the Patron Status workform. See "Find patron services and related records" on page 14.
2. Select **View, Items Out** or click  to display the Items Out view.
3. Select the appropriate line item in the Items Out list.
4. Click  or press **CTRL+L** to display the Declare lost item dialog box.

   The Declare lost item dialog box appears.

   If the patron has already received a bill for the item, the **Billed** check box is selected. If the item is not overdue, or your library does not charge for overdues, all the **Overdue** boxes are unavailable.
5. Manage the replacement charge by following these steps:

   > **Important:**
   > If your library uses Active Payment Manager (Class Point of Sale) to manage payments, you cannot pay the charge from this dialog box. Instead, you must charge the patron's account, then pay the charge from the Patron Status workform - Account view.

   - To change the replacement amount, type the new amount in the Replacement **Amount** box.

     This allows you to process a partial payment. It does not change the amount of the charge.
   - Select **Charge**, **Pay**, or **Waive** in the Replacement **Actions** box. (**Charge** places the charge on the patron's account.) If you selected **Pay**, then select a payment type in the **Payment method** box. If your library accepts credit card payments, and the patron wants to pay with a credit card, select **Credit card** in the method box. For more information about taking credit card payments, see "Take credit card payments for fines and fees - PayPal Payflow Pro" on page 188.

   > **Note:**
   > For a billed item, the options are **Leave as is**, **Pay** or **Waive**. The charge has already been posted to the patron's account.

6. Manage the processing fee, if any, by following these steps:
   - If you want to change the amount, type the new amount in the Processing **Amount** box.

     This allows you to process a partial payment. It does not change the amount of the charge.
   - Select **Charge**, **Pay**, or **Waive** in the Processing **Actions** box. (**Charge** places the charge on the patron's account.) If you selected **Pay**, then select a payment type in the **Payment method** box. If your library accepts credit card payments, and the patron wants to pay with a credit card, select **Credit card** in the method box. For more information about taking credit card payments, see "Take credit card payments for fines and fees - PayPal Payflow Pro" on page 188.
7. If there is an overdue charge, manage the charge by following these steps:
   - If you want to change the overdue amount, type the new amount in the Overdue **Amount** box.

     This allows you to process a partial payment. It does not change the amount of the charge.
   - Select **Charge**, **Pay**, or **Waive** in the Overdue **Actions** box. (**Charge** places the charge on the patron's account. This option may be unavailable if your library charges the overdue fine only when a lost item is recovered.) If you selected **Pay**, then select a payment type in the **Payment method** box. If your library accepts credit card payments, and the patron wants to pay with a credit card, select **Credit card** in the method box. For more information about taking credit card payments, see "Take credit card payments for fines and fees - PayPal Payflow Pro" on page 188.
8. Click **OK** on the dialog box.

   The Items Out view appears, but the item declared lost no longer appears in the Items Out list. If you paid or waived an amount and you set Polaris to print fine receipts from the Patron Status workform, a receipt prints. See "Setting Up Receipt Printing from Workforms" on page 79.

   Note:
   Your library may suppress fine receipts for waive transactions. See "Set fine receipt options" in the *Polaris Patron Services Administration Guide 4.1R2*.

After an item is declared lost, patron and item records are automatically updated:

Tip:
You can open the item record for a lost item from the Patron Status workform - Claims view. Right-click the item in the Claims list, and select **Links**, **Item Record**.

- The item is removed from the patron's Items Out view and moves to the Claims view.
- The transaction is displayed on the Patron Status workform - Account view or the Transaction Summary dialog box.

- If the patron's account was charged a replacement cost, and the cost was not paid or waived, the Lost item counter is incremented on the Patron Status workform - General view and the Patron Status workform - Claims view. You may need to refresh the view (press **F5**) to see the change.
- The patron barcode is moved to the **Previous borrower** box on the Item Record workform - Circulation view, if the Patron Services parameter **Last use patron display** is set to **Yes** in Polaris Administration.
- The item circulation status changes to Lost.
- Any hold request status for the item changes to Not-supplied.

Related Information

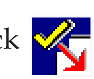
- **Reconciling charges** - If you charged an amount for the lost item, you pay or waive the charge from the Patron Status workform - Account view. See "Pay charges from the Account view" on page 180.

  Important:
  If an item is found at circulation after it has been declared lost, the item status and patron account need to be resolved. Your library may set certain automatic actions that are taken in this situation, or you may manually manage the item and patron record through the Resolve lost item dialog box. If you manage recovered items manually, see "Resolve a lost-and-unpaid item at circulation" on page 162 and "Resolve a lost-and-paid item at circulation" on page 163.

- **Lost item counter** - The count in the Lost item counter on the Patron Status workform - General view and the Patron Status workform - Claims view increases when a replacement cost for an item is charged to the patron's account. When the charges related to the item are paid, waived, or otherwise resolved, the count decreases.

Manage a billed item that is not Lost

If an item's status is *not* Lost, but the patron's account has been charged, follow these steps to resolve the charge and the item.

1. Open the patron's record in the Patron Status workform - Account view. See "Access the account data for a patron record" on page 175.
2. Pay or waive the charges for the billed item.
3. Check in the item:
   - From the Check In workform - See "Do a normal check-in from the Check In workform" on page 126
   - From the item record - Select **Tools, Check In**, or click .

   The item's status changes to In. If your library does not include overdue charges on bills, the overdue fine may be calculated and charged to the patron's account at this point.

Resolve a lost-and-unpaid item at circulation

During check-in, check-out, or renewal, the Resolve lost item dialog box may appear if the item has been declared lost. Follow these steps if an item has been declared lost, the item has been charged (but not paid for or waived), and the item is found at circulation.

> **Note:**
> Your library may set automatic processing options to resolve lost items that are recovered at circulation. See "Setting Lost Item Recovery Defaults" in the *Polaris Patron Services Administration Guide 4.1R2*. If these are in effect, the Resolve lost item dialog box does not appear.

1. Select a payment action in the Replacement **Actions** box:
   - **Waive** - Select this to waive or partially waive the replacement amount.
   - **Leave as is** - Select this to do nothing with the patron's account.
2. If there is a processing fee, select a payment action in the Processing **Actions** box:
   - **Waive** - Select this to waive or partially waive the processing amount.
   - **Leave as is** - Select this to do nothing with the patron's account.
3. If there is an overdue charge, select a payment action in the Overdue **Actions** box:
   - **Pay** - Select this to pay or partially pay the overdue amount. You must select a payment method in the **Payment Method** box. If your library accepts credit card payments, and the patron wants to pay with a credit card, select **Credit card** in the method box. For more information about taking credit card payments, see "Take credit card payments for fines and fees - PayPal Payflow Pro" on page 188.

     > **Important:**
     > If your library uses Active Payment Manager (Class Point of Sale) to manage payments, you cannot pay a fine from the Resolve Lost Item dialog box. Select **Waive** or **Leave as is** instead. If you choose to leave the charge on the patron's account, you can pay it from the Patron Status workform - Account view using Class Point of Sale.
   - **Waive** - Select this to waive or partially waive the overdue amount.
   - **Leave as is** - Select this to do nothing with the patron's account. The circulation process (check in, check out, or renewal) is completed.
4. Click **OK** on the dialog box.

   > **Note:**
   > If you click **Cancel**, the circulation process stops and the Resolve lost/billed item dialog box closes. The next time you attempt to check in, check out, or renew the item, the Resolve lost item dialog box appears.

   - The item circulation status changes from Lost to In.

- On the Patron Status workform, paid and waived amounts appear in the Transaction Summary dialog box (Account view), and the lost item counter decrements (General view and Claims view). The item is removed from the claimed items list (Claims view).
- If you set Polaris for fine receipt printing at the current workform, then a receipt prints. See "Setting Up Receipt Printing from Workforms" on page 79.

Resolve a lost-and-paid item at circulation

Follow these steps if an item has been declared lost, the item has been paid for, and the item is later found at circulation.

> **Note:**
> If an item has been declared lost and billed, follow this procedure to refund or credit the patron account.

> **Note:**
> Your library may set automatic processing options to resolve lost items that are recovered at circulation. See "Setting Lost Item Recovery Defaults" in the *Polaris Patron Services Administration Guide 4.1R2*. If these are in effect, the Resolve lost item dialog box does not appear.

1. Select one of the following options in the Replacement **Actions** box:
   - **Credit** - Select this to credit the patron's account. The credit can be applied to current or future charges. Use this option if the patron is not present when the item is found, and then notify the patron.

     > **Note:**
     > **Credit** and **Refund** are not available options if the payment was made by credit card. However, depending on your library's e-commerce provider, you may be able to issue a refund to the patron's credit card account. See "Managing Credit Card Orders" on page 193.

   - **Refund** - Select this to refund the patron's money.
   - **Leave as is** - Select this to do nothing with the patron's account. The circulation process (check-in, check-out, or renewal) is completed.

     > **Note:**
     > For billed items, the options are **Credit** and **Refund**.

2. Select one of the following options in the Processing **Actions** box:
   - **Credit** - Select this to credit the patron's account. The credit can be applied to current or future charges. Use this option if the patron is not present when the item is found, and then notify the patron.
   - **Refund** - Select this to refund the patron's money.

     > **Note:**
     > **Credit** and **Refund** are not available options if the payment was made by credit card. However, depending on your library's e-commerce provider, you may be able to issue a refund to the patron's credit card account. See "Managing Credit Card Orders" on page 193.

   - **Leave as is** - Select this to do nothing with the patron's account. The circulation process (check-in, check-out, or renewal) is completed.

     > **Note:**
     > For billed items, the options are **Credit** and **Refund**.

3. If there is an overdue charge, select a payment action in the Overdue **Actions** box:
   - **Pay** - Select this to pay or partially pay the overdue amount. You must select a payment method in the **Payment Method** box. If your library accepts credit card payments, and the patron wants to pay with a credit card, select **Credit card** in the method box. For more information about taking credit card payments, see "Take credit card payments for fines and fees - PayPal Payflow Pro" on page 188.

     Important:
     If your library uses Active Payment Manager (Class Point of Sale) to manage payments, you cannot pay a fine from the Resolve Lost Item dialog box. Select **Waive** or **Leave as is** instead. If you choose to leave the charge on the patron's account, you can pay it from the Patron Status workform - Account view using Class Point of Sale.
   - **Waive** - Select this to waive or partially waive the overdue amount.
   - **Leave as is** - Select this to do nothing with the patron's account. The circulation process (check in, check out, or renewal) is completed.
4. Click **OK** on the dialog box.

   Note:
   If you click **Cancel**, the circulation process stops and the Resolve lost/billed item dialog box closes. The next time you attempt to check in, check out, or renew the item, the Resolve lost item dialog box appears.

   - The item circulation status changes from Lost to In.
   - On the Patron Status workform, paid, waived, and credited amounts appear in the Transaction Summary dialog box (Account view).

Patron Status and Accounting

The Patron Status workform is the first place to look when patrons have questions about their accounts. You can view and print the patron's current items out, estimate fines, and confirm the notices a patron has received regarding an item. This workform is also the central point for patron accounting. It tracks the patron's financial transactions with the library, including charges, payments, deposits, and credits. You can also view a history of the patron's account activity.

This unit covers the following topics:

Displaying All Items Out

From the Patron Status workform - Items Out view, you can view and print all the items that a patron currently has checked out. The Items Out list displays each item's basic information and includes the due date and time, call number, material type, and assigned branch. By default, the list is sorted and prints by due date (oldest to most recent). You can sort the list on other fields by clicking the column headers. See "Display and print the Items Out list" on page 166.

You can also estimate fines on currently overdue items from this view. See "Estimate fines on currently checked out items" on page 168.

Display and print the Items Out list

Printing the Items Out list provides the patron with a verification of all the items he or she has currently checked out, or a receipt for renewal if printed receipts are not set to print automatically for the Patron Status workform. Follow these steps to display and print the Items Out list from the Patron Status workform.

Tip:
From the Patron Registration workform, press **F9** to open the Patron Status workform.

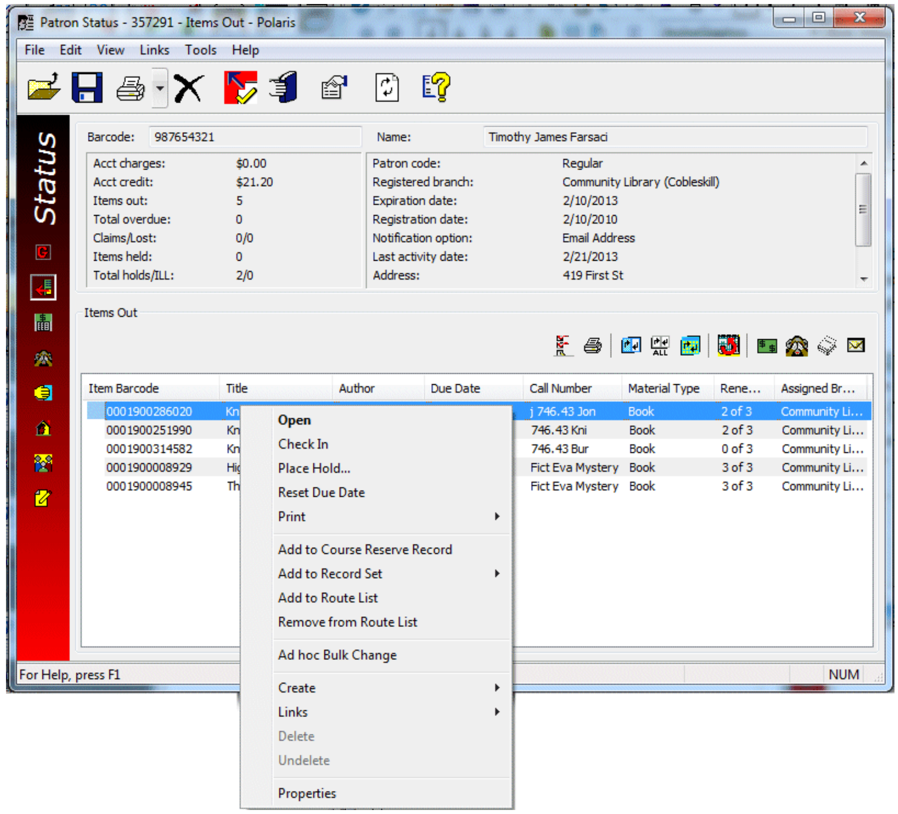
1. Open the patron's record in the Patron Status workform. See "Find patron services and related records" on page 14.

   Note:
   From the Check Out workform, select **Links, Existing, Patron Status**.

2. Select **View, Items Out** or click to display the Items Out view.

   Overdue items are marked with a yellow Alert icon. Billed items are marked with a red Alert icon. You can see more information about any item in the Items Out list. Right-click the item and select **Open** from the context menu to open the item record. Or select **Links** from the context menu to see choices related to circulation, holds, bibliographic, and other information.

Tip:
If a checked-out item is a serial, the serial designation (enumeration and chronology) is added to the title. You may need to expand the title column to see the designation.



3. To set up printing from the Patron Status workform, follow these steps:

   Important:
   Steps a-c only have to be done the first time after installation or whenever you want to change the default printer.

   a) Select **Tools**, **Options...**. to display the Patron status: Tools Options dialog box.

   b) Set the receipt/slip options for your printer and the types of receipts and slips you print from the Patron Status workform. See “Set the workstation to print receipts and slips” on page 81.

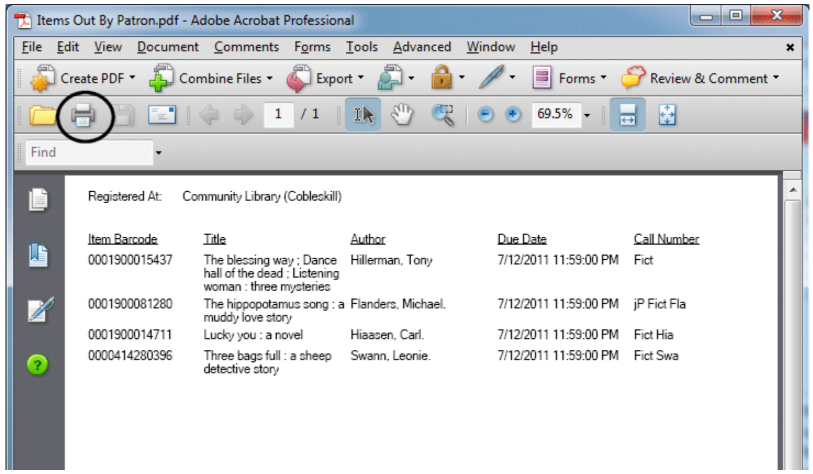
   Note:
   Receipt printer options are set in Polaris Administration. See "Set receipt printer control codes” in the *Polaris Patron Services Administration Guide 4.1R2*.

   c) Click **OK** on the dialog box.

   The Items Out view appears.

4. To print the Items Out list, click the printer icon above the Items Out list (not the icon at the top of the workform), or press **CTRL+ALT+P**.

   If the workform printer is set to **Receipt**, the list is printed. If the printer is set to **Page**, the Report Preview window opens. Click the printer icon on the Report Preview window to print the list.



Note:
Your library specifies the information that is included on the receipt. See "Set Items Out receipt options" in the *Polaris Patron Services Administration Guide 4.1R2*.

Related Information

Print a packing list for reader ratings - If your library collects reader ratings from outreach services patrons, you can print a packing list for gathering ratings from the Patron Status workform - Items Out view. Select the items to be rated and click above the Items Out list. For more information, see "Processing Outreach Services Items" on page 283 and "Working with Reader Ratings" on page 300.

1-2-3

Estimate fines on currently checked out items

You can estimate accrued fines for a patron on items that are currently checked out, calculating the fines if the items were returned today or on a date you select. Your library may opt to include items in the estimated fine calculation that are declared or billed lost but the overdue fine has not yet been charged, and/or may include claimed items in the calculation. The library may also choose to include estimated fines in the threshold calculation that determines if a patron should be blocked for overdue fines. See "Calculating and Blocking for Estimated Accrued Fines" in the *Polaris Patron Services Administration Guide 4.1R2*.

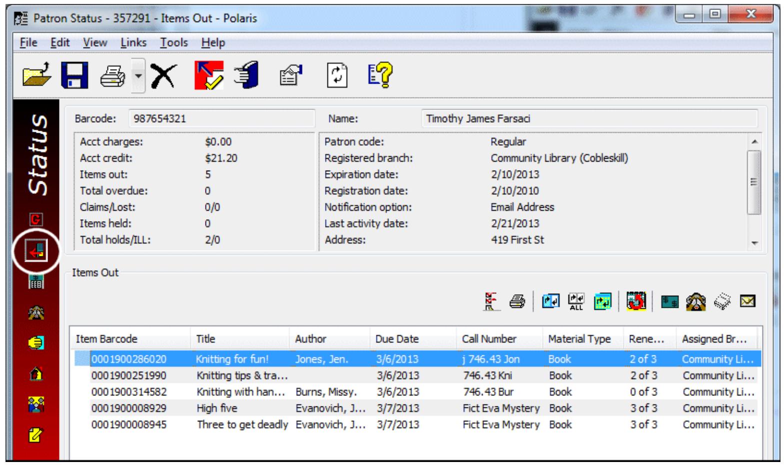
Follow these steps to estimate fines for a patron from the Patron Status workform - Items Out view.

Tip:
From the Patron Registration workform, press **F9** to open the Patron Status workform.

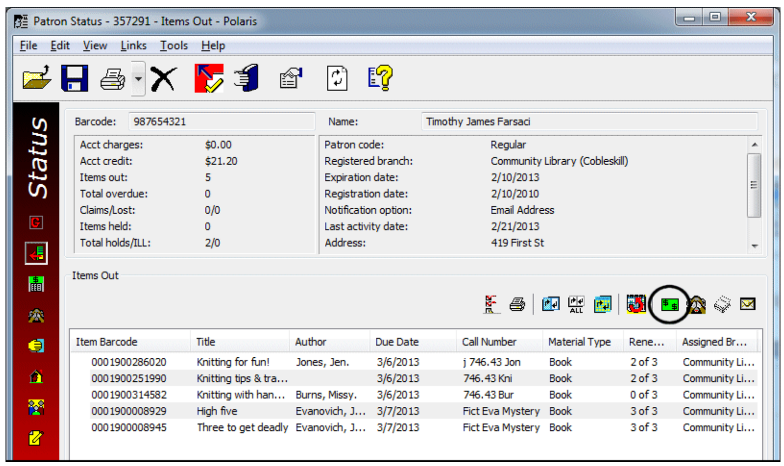
1. Open the patron's record in the Patron Status workform. See "Find patron services and related records" on page 14.

   Note:
   From the Check Out workform, select **Links, Existing, Patron Status**.

2. Select **View, Items Out** or click to display the Items Out view.

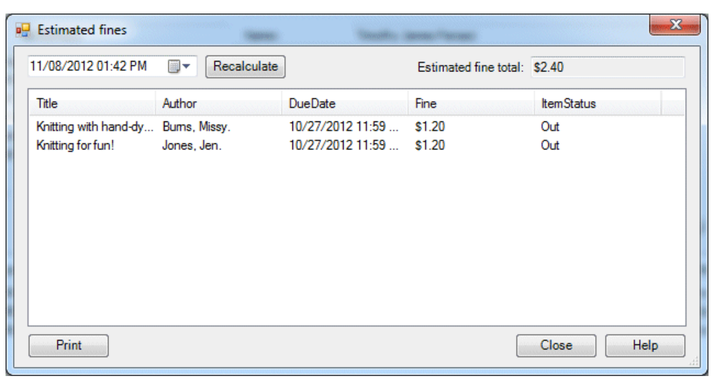


3. Click the Estimated Fines icon  above the Items Out list.

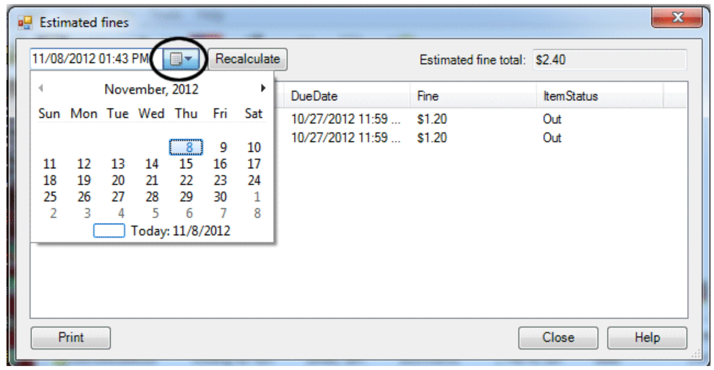


The Estimated Fines dialog box opens. The dialog box shows the fine on each item and the total estimated fines if the items are returned today.

Note:
The displayed amount never exceeds the maximum fine limit per material type set up in Polaris Administration, even if the calculated amount is greater. That is, the patron is never charged more that the maximum fine limit.



4. To view the estimated fines if the items are returned at a future date, click the calendar icon and use the calendar control to set the date; then click **Recalculate**.



5. Click **Print** to print the information on the printer specified for the workstation.

   The information is formatted for a receipt printer and includes the title, author, due date, and estimated fine. If your library includes claimed and/or lost items in the calculation, these are included in the printed information.

Related Information

If your library has opted to include lost/and or claimed items in the estimated fines calculation, you can also estimate fines from the Claims view. See "Estimate fines from the Patron Status workform - Claims view" on page 156.

Reviewing Notice Histories

The notice history is a list of the notices that have been sent to a patron regarding a specific item. The list includes the notification method, the date, notification organization, and the amount of any related charges. If the notice was delivered by e-mail, text message, or telephone, the notice history also indicates whether the delivery was successful. When the item has been checked in and all charges have been resolved, the notice history for that item is no longer available.

Note:
Additional text message notices, which are sent in addition to another method, do not appear in the patron's notification history. For example, if both a printed notice and an additional text message notice are sent for an item, only the printed notice appears in the notification history.

Your library sets separate retention periods for hold notices (pick-up and cancelled hold notices) and item and account notices (overdue, fine, bill, and reminder notices). See "The Notification History" in the *Polaris Patron Services Administration Guide 4.1R2*. An entry is kept in the notification history if it falls within the specified period of time, the related item is still checked out, claimed or lost by the current patron, and current charges are not resolved. The entry is kept under these circumstances even if the related item is purged or deleted from the database; in this case, the title is prefixed by **[DELETED]**.

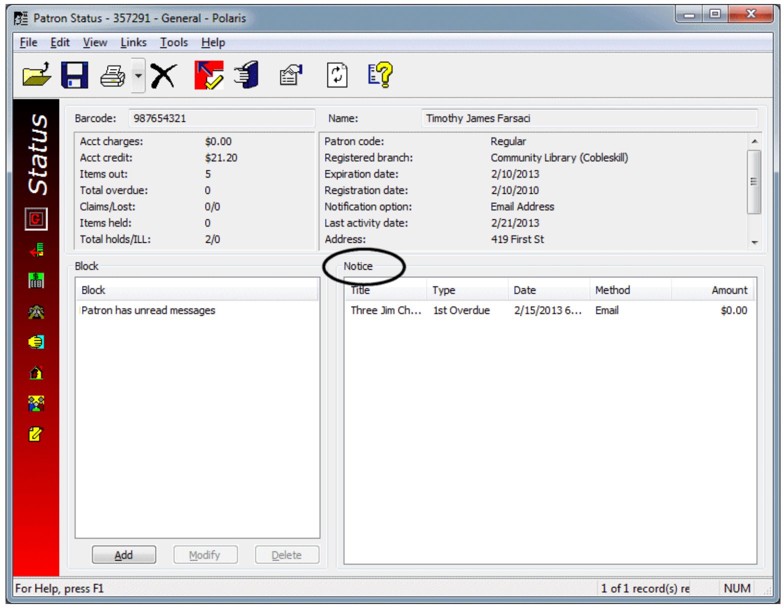
Display and print notice histories

Follow these steps to display and print the notice history.

Note:
To display the notice history, you need the Circulation permission **Patron status: Access notice history**. See "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*.

Tip:
From the Check Out workform, select **Links, Existing, Patron Status**.

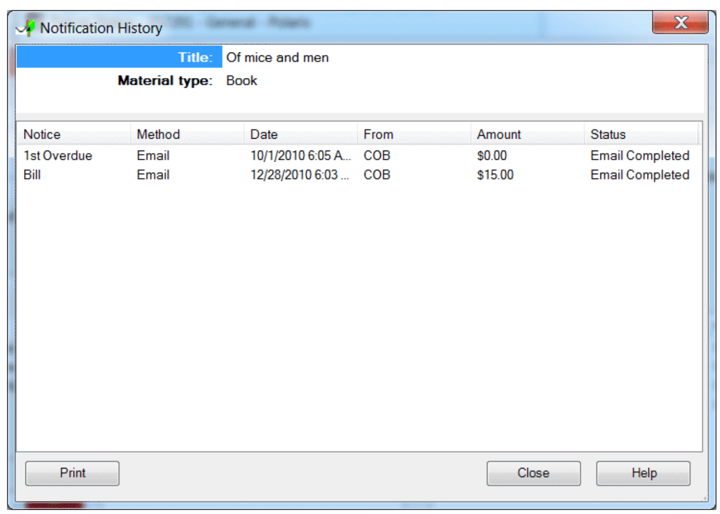
1. Open the patron's record in the Patron Status workform - General view or Patron Registration workform - Status View. See "Find patron services and related records" on page 14. The illustration shows an example.



Note:
A maximum of 250 entries is initially displayed. You can scroll the list to load another 250 entries at a time, or press **CTRL+SHIFT+A** to load all the entries. Each entry represents the latest notice for an item. Go to step 2 to see the entire notification history for an item.

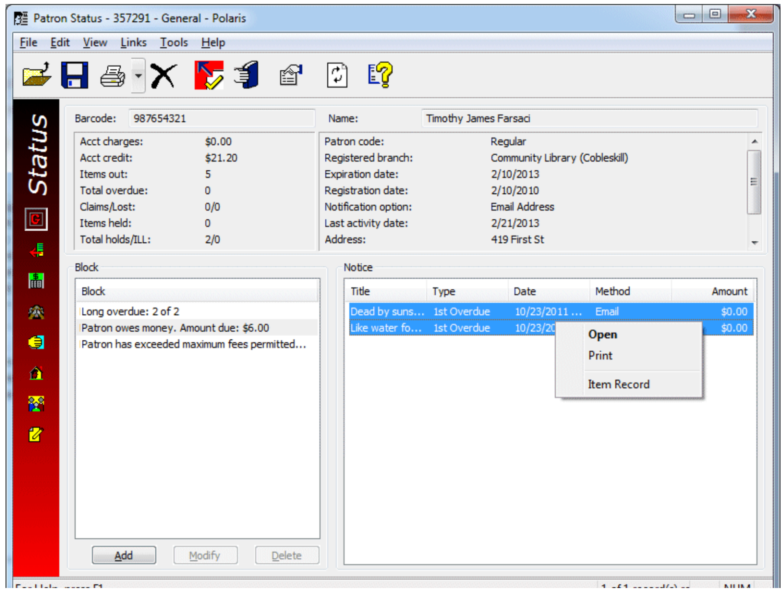
2. To open a notice history, double-click an item in the Notices list, or right-click the item and select **Open** from the context menu.

   The Notification History opens. From here, you can click **Print** if you want to print the notification history for this item.



Note:
You can also open the Notification History from the Patron Status workform - Items Out view, Claims view, or Account view. Select the item in the list of items out, and click (or press **ALT+N**).

3. To print multiple notice histories, select the items in the patron's Notice list and right-click. Then select **Print** from the context menu.

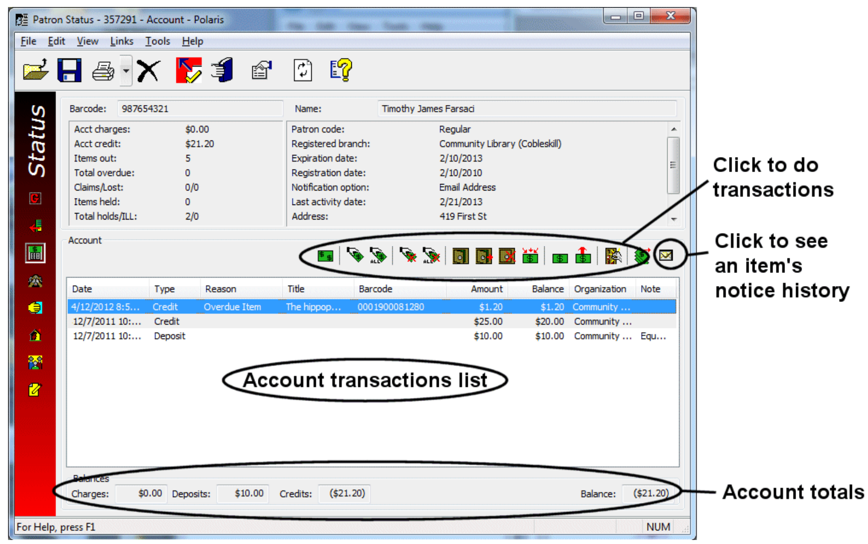


4. To open a related item record, right-click an item in the list and select **Item Record** from the context menu.

Viewing Patron Financial Accounts

Patron accounting includes charging fines and fees to patrons and reconciling these charges. The library can charge patrons for overdue, lost, and damaged items, and for special services. Your library may also require deposits for library services, and later return or forfeit the deposits.

From the Patron Status workform - Account view, you can view a patron’s outstanding charges, deposits, and credits and take appropriate action.



Note:
Several Circulation permissions control the ability to access and work with patron accounts. See “Setting Circulation Permissions” in the *Polaris Patron Services Administration Guide 4.1R2*.

Tip:
If an item in the list is a serial, the serial designation (enumeration and chronology) is added to the title. You may need to expand the title column to see the designation.

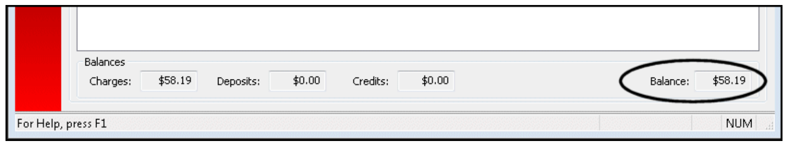
The bottom portion of the workform displays the account transaction list. Each line item in the list includes the transaction’s date, type, and amount, as well as the current balance for the transaction. A line item may also contain a reason for the transaction, an associated title, a barcode, and notes. Separate line items replacement and overdue charges.

By clicking the appropriate button above the Account Transaction list, you can do financial transactions and access a summary of completed transactions. Place your cursor over any button to see a tooltip that identifies the button’s function.

You can see a list of notices that have been sent for an item. Select the item in the Account Transaction list and click (or press **ALT+N**). The Notice History dialog box opens. You can print the notice history; for details, see “Reviewing Notice Histories” on page 171.

At the bottom of the Account view, the **Charges**, **Deposits**, and **Credits** boxes track total amounts on the patron's account, and increase or decrease according to the account transactions. For information on doing these transactions, see "Processing Charges and Payments" on page 179. The amount of the balance is the total of all charges minus the total of any credits. If the patron's charges exceed any credits, the amount is displayed as a positive number. If the total credit amount is greater than the total charges, the amount is displayed in parentheses.

Note:
Deposits are not included in the balance calculation.



Access the account data for a patron record

Follow these steps to display the Account view of a patron's record.

1. Open the patron's record in the Patron Status workform, using one of these methods:
   - From the Patron Registration workform, press **F9**.
   - From the Polaris Shortcut Bar, select **Circulation, Patron Status** (or press **F6**). Use the Find Tool to find and open the patron's status record. See "Find patron services and related records" on page 14.

   The Patron Status workform opens to the Items Out view.

Tip:
Click this button on the Shortcut Bar to display the patron records Find Tool, or press **F6**. You can set the **Search by** box in the Find Tool to **Barcode**, and scan the patron's barcode into the **For** box.

2. Select **View, Account** or click the button to display the Account view. See the following topics to do account transactions:
   - "Display completed account transactions" on page 176
   - "Display a transaction's history" on page 177
   - "Create a charge from the Account view" on page 179
   - "Pay charges from the Account view" on page 180
   - "Waive charges from the Account view" on page 182
   - "Create a credit manually" on page 184
   - "Refund a credit amount" on page 185
   - "Refund or credit completed payment transactions" on page 186
   - "Take credit card payments for fines and fees - PayPal Payflow Pro" on page 188
   - "Take payments for fines and fees - Comprise SmartPAY" on page 190
   - "Working with Deposits" on page 200

Display completed account transactions

Polaris automatically moves all completed transactions from the Account Transaction list to the Transaction Summary dialog box, where they are archived for a period set in Polaris Administration. See “Setting Patron Accounting Options” in the *Polaris Patron Services Administration Guide 4.1R2*.

> **Note:**
> The following transactions remain in the transaction summary, regardless of the Administration setting for deleting transactions: payments that have been refunded or credited; deposits that have been credited; any transaction associated with a credit; any transactions that occur for patrons currently in collection.

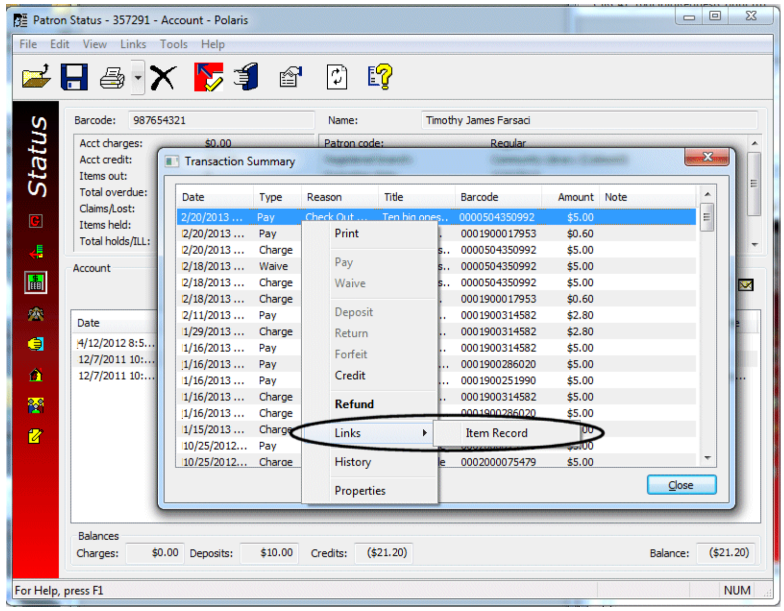
You can view the Transaction Summary if you have the permission **Access patron account: transaction summary** for the patron’s registered branch. Follow these steps to view the archive of a patron’s completed monetary transactions.

1. Open the patron’s record in the Patron Status workform. See “Find patron services and related records” on page 14.
2. Select **View, Account** or click to display the Account view.
3. Click above the Account list view, or press **CTRL+T**.

   The Transaction Summary dialog box appears. All reconciled transactions are listed in the dialog box for the period set in Polaris Administration.
4. To sort the line items, click the appropriate column header.

   You may find it helpful to sort the Transaction Summary by title or barcode to group the charges, payments, and waivers for a particular item.

   You can open a linked item record from the Transaction Summary. Right-click the line item in the Transaction Summary dialog box, select **Links** from the context menu, and select **Item Record**.



Display a transaction's history

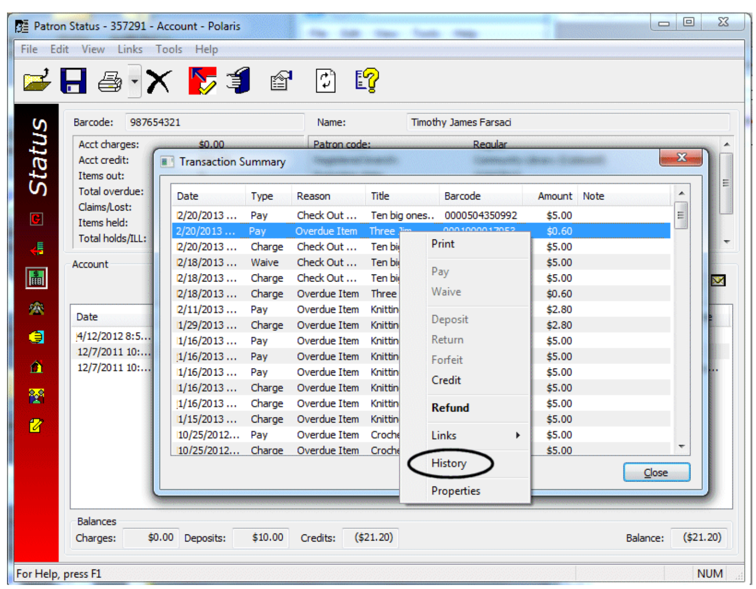
You can view the account activity for any selected line item in the Account Transaction list or the Transaction Summary dialog box. Follow these steps to view the account activity for a particular transaction.

1. Open the patron's record in the Patron Status workform - Account view. See "Access the account data for a patron record" on page 175.

2. If the transaction has been reconciled, click or press **CTRL+T** to display the Transaction Summary dialog box.

3. Right-click the transaction line item, and select **History** from the context menu.

Note:
You can view additional information about each transaction, including an item's check-out date and due date if applicable. Right-click a line item in the Account Transaction list or the Transaction Summary dialog box, and select **Properties** from the context menu.



The Transaction History dialog box appears.

Related Information

- **Overdue items processing** - Polaris manages overdue items through fines, blocks, and notices. Settings in Polaris Administration determine whether and how these functions are used in your library. See the *Polaris Patron Services Administration Guide 4.1R2*.
  - Your library may issue up to three overdue notices and a bill for an overdue item. For the procedures to issue overdue notices and the applicable settings, see "Overdue Notices, Bills, and Combined Notices" in the *Polaris Patron Services Administration Guide 4.1R2*.
  - Your library may choose to have Polaris automatically change an item's status to lost when the item is billed for overdue fines. See "Set lost item charge options" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Patron blocks** - Patrons are automatically blocked at check-out and renewal under the following circumstances:
  - They owe more than a library-specified amount of money.
  - They have more than a library-specified number of items overdue.
  - They have one or more items long overdue.

  See "Working with Blocks (Stops)" on page 116.
- **Managing overdue fines at circulation** - See "Resolve a fine at check-in" on page 128.
- **Deleted items** - For most items, the item record identification (title and barcode) is still available after the item has been deleted, so charge and pay or waive transactions remain related to the item. This feature does not apply to ILL item records.

Processing Charges and Payments

Charges include overdue fines, replacement costs, and any other fees that a library chooses to implement. Some charges are automatically assigned to patron accounts. For example, the system may automatically calculate and assign charges when an item is manually declared lost, an overdue item is billed, and when any overdue item is recovered at check-in, check-out, or renewal. These charges are determined by Polaris Administration settings for your library. In addition, you can manually assign a charge at any time, such as for a damaged item. See "Create a charge from the Account view" on page 179.

With the appropriate permissions, you can reconcile current charges in a patron account by paying them or waiving them, you can issue refunds or credits on completed transactions, and you can manually create a credit in a patron's account.

Note:
The **Last activity date** will be updated on the patron record when a payment is made on the patron account.

1-2-3

Create a charge from the Account view

You typically associate a charge with a predefined reason (such as item damage or a special service). The library sets the reasons in Polaris Administration. See "Defining Fee Descriptions" in the *Polaris Patron Services Administration Guide 4.1R2*. Follow these steps to manually create a charge on a patron's record.

Note:
As you work with the patron record, you can refresh the header information in the workform by pressing **F5** (or select **View, Refresh**, or click on the toolbar).

1. Display the patron's record in the Patron Status workform - Account view (see "Access the account data for a patron record" on page 175).
2. Click above the Account list view, or press **CTRL+C**.

   The Charge dialog box appears.
3. Type the amount you want to charge in the **Amount** box (maximum $2,000,000.00).
4. Select a reason for the charge in the **Reason** box.
5. If the charge is associated with an item, scan the item barcode in the **Associated item** box.

Note:
You can click **Find** to search for an item record.

6. If you want to add a note, type it in the **Notes** box.
7. Click **OK** on the dialog box.

   The Patron Status workform - Account view appears. A charge appears in the Account Transaction list, and the total amount of account charges appears in the **Charges** box at the bottom of the view. If the charge is a replacement charge for a lost item, the count in the Lost item counter (General view and Claims view) increases.

Pay charges from the Account view

You can pay a single charge, selected charges, or all charges in a single transaction. You can also do a partial payment, or accept an overpayment. Follow these steps to pay charges on a patron's account.

> **Note:**
> As you work with the record, you can refresh the header information in the workform. Press **F5**, elect **View, Refresh**, or click on the toolbar.

1. Open the patron's record in the Patron Status workform - Account view. See "Access the account data for a patron record" on page 175.
2. Choose one of the following options:
   - To pay one or multiple charges, select the charge or charges in the Account Transaction list, and click or press **CTRL+Y**.
   - To pay all charges, click or press **CTRL+L**.

   > **Important:**
   > If your library uses Active Payment Manager (Class Point of Sale) to manage payments, the Class Point of Sale window opens. Follow your library's procedures from this point to process the payment. The remaining steps in this procedure apply to payments in Polaris only.

   The Pay dialog box appears.
3. If you want to partially pay the selected charge or charges, type the new amount in the **Amount** box (maximum $2,000,000.00).

   If you are making a partial payment on a single charge, the payment will be recorded as a partial payment on the charge, and the Account Transaction list will show a balance for the charge. If you are making a partial payment on multiple or all charges, the payment amount is applied to the oldest charges first. Each paid transaction is removed from the Account Transaction list, and recorded in the Transaction History. Any remaining amount is applied to the next most recent charge as a partial payment.

4. If you want to accept an overpayment, follow these steps:

a) Type the new amount in the **Amount** box.

- If your library allows overpayments to be recorded as account credits, a dialog box appears that alerts you to the overpayment and provides the choice of crediting the account or not. Click **Yes** to credit the patron’s account. Click **No** to pay the charge without recording a credit. (Click **Cancel** if you entered the wrong amount.)
- If your library does not allow overpayments to be recorded as credits, a message indicates how much change you should give the patron. Click **OK** on the message box.

5. Select a payment method in the **Method** box.
   - Use the method **Collection Agency** to record a payment that a patron has made directly to a collection agency, as reported by the collection agency.
   - The method **Pay from Credit** is available only if there is a credited amount on the patron’s account.
   - If your library accepts credit card payments, and the patron wants to pay with a credit card, select **Credit card** in the method box. For more information about taking credit card payments, see “Take credit card payments for fines and fees - PayPal Payflow Pro” on page 188. or “Take payments for fines and fees - Comprise SmartPAY” on page 190.
6. If you want to add a note about the transaction, type the information in the **Note** box.
7. Click **OK** on the Pay dialog box.

   The Patron Status workform - Account view appears, and the amount in the **Charges** box decreases. The following situations may occur:
   - If a charge was only partially paid, the charge still appears in the Account Transaction list with the balance in the Balance column. The payment appears in the Transaction Summary dialog box.
   - If charges were paid in full, they no longer appear in the Account Transaction list. Instead, they appear in the Transaction Summary dialog box, along with payments.

   If you paid multiple charges, each charge line item has a corresponding pay line item.

   If you have set Polaris to print fine receipts from the Patron Status workform, a receipt is printed.

Important:
For the first time after installation only, you need to set up Polaris to print receipts and slips. You can also opt to print the fine receipt only if the patron does not receive eReceipts. See “Setting Up Receipt Printing from Workforms” on page 79.

Related Information

- **Viewing transactions made from a credit** - You can see the transactions made from a credit in the patron account. Right-click the credit in the Account Transaction list, and select **History** from the context menu. The Transaction History dialog box opens, listing the transactions made from the credit. To print a transaction in the list, right-click it and select print from the context menu.
- **Refunding a credit** - See "Refund a credit amount" on page 185.
- **Managing overdue fines at circulation** - See "Check out an item" on page 94 and "Resolve a fine at check-in" on page 128.
- **Setting Polaris to allow credits from overpayments** - See "Setting Patron Accounting Options" in the *Polaris Patron Services Administration Guide 4.1R2*.

Waive charges from the Account view

From the Account view, you can waive a single charge, selected charges, or all charges in a single transaction if you have the appropriate permissions. You can also waive part of a charge, or apply one waive amount to each of several charges. Follow these steps to waive charges on a patron's account.

> **Note:**
> As you work with the record, you can refresh the header information in the workform. Press **F5**, select **View, Refresh**, or click  on the toolbar.

Tip:
You can right-click a line item and select **History** from the context menu to see more information about the transaction.

1. Open the patron's record in the Patron Status workform - Account view. See "Access the account data for a patron record" on page 175.
2. Choose one of the following options:
   - To waive one or multiple charges, select the charge or charges in the Account Transaction list, and click  or press **CTRL+W**.
   - To waive all charges, click  or press **CTRL+V**.

     > **Note:**
     > Your library may make this feature unavailable for use.

   The Waive dialog box appears.
3. To partially waive the selected charge or charges, type the new amount in the **Amount** box (maximum $2,000,000.00).

   If you are making a partial waive on a single charge, the transaction will be recorded as a partial waive on the charge, and the Account Transaction list will show a balance for the charge. If you are making a partial waive on multiple or all charges, the waived amount will be applied to the oldest charges first. Each waived transaction is removed from the Account Transaction list, and recorded in the Transaction History. Any remaining amount is applied to the next oldest charge as a partial waive.

4. To apply the same waived amount to *each* of multiple charges, select (check) the **Distributed Waive** check box, and type an amount to waive. (If the library does not allow distributed waives, this check box is not available for selection.)

   Note:
   If a specific individual charge is equal to the waive amount, that charge is completely waived. Charges less than the distributed waive amount are not affected.

5. To add a note to the transaction, type the information in the **Note** box.

   For distributed waives, the note will appear with each transaction.

6. Click **OK** on the Waive dialog box.

   The Patron Status workform - Account view appears, and the amount in the **Charges** box decreases. The following situations may occur:

   - If a charge was only partially waived, then the charge still appears in the Account Transaction list with the balance due in the Balance column. The waiver appears in the Transaction Summary dialog box.
   - If charges were waived in full, then they no longer appear in the Account Transaction list. Instead, they appear in the Transaction Summary dialog box, along with the waivers.

   If you waived multiple charges, each charge line item has a corresponding waive line item.

   If you have set Polaris to print fine receipts from the Patron Status workform, and your library has set Polaris to print fine receipts for waive transactions, a receipt prints.

   Important:
   For the first time after installation only, you need to set up Polaris to print receipts and slips. You can also opt to print the fine receipt only if the patron does not receive eReceipts. See "Setting Up Receipt Printing from Workforms" on page 79.

Related Information

- **Managing overdue fines at circulation** - See "Check out an item" on page 94 and "Resolve a fine at check-in" on page 128.
- **Setting Polaris to allow distributed waives** - See "Setting Patron Accounting Options" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Setting Polaris to suppress fine receipts for waives** - See "Set fine receipt options" in the *Polaris Patron Services Administration Guide 4.1R2*.

Create a credit manually

From the Patron Status workform - Account view, you can create a credit that is unrelated to any specific charge or overpayment. Follow these steps to create a credit manually.

Note:
You need the permission **Create a patron account credit: Allow** to do this procedure. See "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*.

Tip:
As you work with the record, you can refresh the header information in the workform. Press **F5**, select **View, Refresh**, or click on the toolbar.

1. Open the patron's record in the Patron Status workform - Account view. See "Access the account data for a patron record" on page 175.
2. Select above the Account Transaction list, or press **CTRL+B**.

   The Create Credit dialog box appears.
3. Type the credit amount in the **Amount** box (maximum $2,000,000.00).
4. Select a payment method for the credit in the **Method** box.
5. If you want to add a note, type the information in the **Note** box.
6. Click **OK** on the dialog box.

   The credit is added to the Account Transaction list, and the amount is added to the total in the **Credits** box.

Related Information

- **Refund a credit amount** - See "Refund a credit amount" on page 185.
- **Refund or credit completed payment transactions** - See "Refund or credit completed payment transactions" on page 186.
- **Accept a deposit** - See "Make a deposit in a patron's account" on page 200.

Tip:
As you work with the record, you can refresh the header information in the workform. Press **F5**, select **View, Refresh**, or click on the toolbar.

Refund a credit amount

From the Patron Status workform - Account view, you can partially or fully refund credit transactions. Follow these steps to refund credits.

1. Open the patron's record in the Patron Status workform - Account view. See "Access the account data for a patron record" on page 175.
2. Select one or more credit transactions to refund in the Account Transactions list.
3. Select above the Account Transaction list, or press **CTRL+G**.

   The Refund Credit dialog box appears.
4. Type the amount to refund in the **Amount** box.

   If you selected multiple credit transactions, and you specify an amount less than the amount shown in the **Balance** box, the refund is applied to the oldest transactions first. Each fully-refunded credit transaction will be removed from the Account Transaction list, and recorded in the Transaction History. Any remaining amount is applied to the next oldest credit in the Account Transaction list as a partial refund.
5. If you want to add a note to the transaction, type the information in the **Note** box.
6. Click **OK** on the dialog box.

   The refund is added to the Account Transaction list, and the amount is subtracted from the total in the **Credits** box.

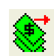
Related Information

- **Viewing transactions made from a credit** - You can see the transactions made from a credit in the patron account. Right-click the credit in the Account Transaction list, and select **History** from the context menu. The Transaction History dialog box opens, listing the transactions made from the credit. To print a transaction in the list, right-click it and select print from the context menu.
- "Refund or credit completed payment transactions" on page 186
- "Return, forfeit, or credit deposits" on page 201
- "Refund a credit card payment from Patron Status - Account view" on page 198

Refund or credit completed payment transactions

Completed transactions are moved to the Transaction History, but you can refund or credit payments even after they are complete. You can refund or credit a single payment, multiple payments, or all payments in a single transaction. You can also do a partial refund or credit. Follow these steps to refund or credit payments for completed transactions on a patron's account.

> **Note:**
> For instructions on refunding payments made by credit card, see "Managing Credit Card Orders" on page 193, and "Refund a credit card payment from Patron Status - Account view" on page 198.

1. Open the patron's record in the Patron Status workform - Account view. See "Access the account data for a patron record" on page 175.
2. Click  or press **CTRL+T** to display the Transaction Summary dialog box.

   All reconciled transactions appear.
3. Select the appropriate payment or payments in the list.
4. Choose one of the following options:
   - To refund a payment or payments, right-click and select **Refund** from the context menu.

     The Refund dialog box appears.
   - To credit a payment or payments, right-click and select **Credit** from the context menu.

     The Credit dialog box appears.
5. If you want to partially refund or credit the amount, type the new amount in the **Amount** box.

   > **Important:**
   > If you chose to refund or credit multiple payments, you *cannot* change the number in the **Amount** box. You must refund or credit the entire amount.
6. If you want add a note to the transaction, type the information in the **Note** box.
7. Click **OK** on the dialog box.

   The Transaction Summary appears. A *refund* line item appears in the Transaction Summary list, but a *credit* line item appears in the Account view's Account Transaction list. Any credit amount is added to the total in the **Credits** box at the bottom of the Account view.

   If you refunded or credited multiple payments, each payment line item has a corresponding refund or credit line item.

Related Information

- **Viewing transactions made from a credit** - You can see the transactions made from a credit in the patron account. Right-click the credit in the Account Transaction list, and select **History** from the context menu. The Transaction History dialog box opens, listing the transactions made from the credit. To print a transaction in the list, right-click it and select print from the context menu.
- “Return, forfeit, or credit deposits” on page 201
- “Managing Credit Card Orders” on page 193
- “Refund a credit card payment from Patron Status - Account view” on page 198

Taking Credit Card Payments

If your library provides credit card processing at the staff workstation through PayPal (VeriSign®) Payflow Pro or Comprise™ SmartPAY™, you can accept a patron's credit card payment at any point in your workflow where you accept payment for charges on the patron's account. (To accept payments through Comprise™ SmartPAY™ payments, your workstation requires a connected Comprise SmartTerminal, the SmartPAY card reader device, connected to it.) As examples, you can select charges to pay in the Patron Status workform - Account view as you would with any other payment method, and you can accept a credit card payment for fines when you renew an overdue item.

Note:
Polaris Administration settings determine the minimum amount you can accept as a credit card payment, and other details specific to your library. See "E-Commerce with PayPal® Payflow Pro®" in the *Polaris Patron Services Administration Guide 4.1R2* or "E-Commerce with Comprise™ SmartPAY™" in the *Polaris Patron Services Administration Guide 4.1R2*. You also need the Polaris permission **Fines: Allow credit card payments**.

1-2-3

Take credit card payments for fines and fees - PayPal Payflow Pro

Follow these steps to take a credit card payment from the Patron Status workform - Account view.

Note:
You can also accept credit card payments when the payment dialog box appears during circulation workflows; for example, when the patron pays a fine at check-in. Start at step 3 of this procedure and follow the remaining steps.

1. Open the patron's record in the Patron Status workform - Account view. See "Access the account data for a patron record" on page 175.
2. Choose one of the following options:
   - To pay one or multiple charges, select the charge or charges in the Account Transaction list, and click  or press **CTRL+Y**.
   - To pay all charges, click  or press **CTRL+L**.

   The Pay dialog box appears.
3. If you want to change the payment amount, type the new amount in the **Amount** box.

   Overpayment is not allowed for credit card payments. For details about partial payments, see "Pay charges from the Account view" on page 180.
4. Select **Credit card** in the **Method** box.

5. If you want to add a note about the transaction, type the information in the **Note** box.

6. Click **OK** on the Pay dialog box.

   The Credit Card Payment dialog box appears.

7. To enter credit card information with a credit card reader, follow these steps:

   Note:
   To enter information manually, go to step 8.

   a) Pass the patron's credit card through the reader.

      The credit card account and billing information is filled in. All but the last four digits of the credit card number are masked.

   b) (Optional) Type a note regarding the transaction.

      This note appears on the Properties dialog box for the transaction in the Credit Card Payments manager. See "Managing Credit Card Orders" on page 193.

   c) Click **Submit**.

      The Credit Card Payment dialog box closes and the workform appears.

8. To enter credit card information manually, follow these steps:

   a) On the Credit Card Payment dialog box, select (check) **Manual credit card entry**.

   Note:
   This option is available only if it has been enabled in Polaris Administration. See "Set up PayPal Payflow Pro credit card payments" in the *Polaris Patron Services Administration Guide 4.1R2*.

The account and billing information fields become available.

b) In the Credit Card section of the dialog box, type the account information.

> **Note:**
> Your library's Payflow Pro setup may require a card security code. This code is typically located on the back of the card near the signature area.

c) In the **Billing Name** and **Address** section of the dialog box, type the billing name and address information for the credit card.

d) (Optional) Type a note regarding the transaction.

This note appears on the Properties dialog box for the transaction in the Credit Card Payments Manager. See "Managing Credit Card Orders" on page 193.

e) Click **Submit**.

The Credit Card Payment dialog box closes and the workform appears.

For details about how the payment is recorded in the Patron Status workform - Account view, see "Pay charges from the Account view" on page 180. If you have set Polaris to print fine receipts from the current workform, a receipt is printed. The receipt includes a credit card transaction summary. If your library has enabled e-mail credit card receipts in Polaris Administration, and there is a valid e-mail address in the patron's record, the patron receives an e-mail receipt for the transaction.

Related Information

View credit card transactions and issue refunds - See "Managing Credit Card Orders" on page 193.

Take payments for fines and fees - Comprise SmartPAY

If your library's e-commerce gateway is Comprise SmartPAY, a Comprise SmartTerminal (the SmartPAY card reader device) must be connected to your workstation. Follow these steps to take a credit or debit card payment from the Patron Status workform - Account view.

> **Note:**
> You can also accept credit card payments when the payment dialog box appears during circulation workflows; for example, when the patron pays a fine at check-in. Start at step 3 of this procedure and follow the remaining steps.

1. Open the patron's record in the Patron Status workform - Account view. See "Access the account data for a patron record" on page 175.

2. Choose one of the following options:
   - To pay one or multiple charges, select the charge or charges in the Account Transaction list, and click or press **CTRL+Y**.
   - To pay all charges, click or press **CTRL+L**.

   The Pay dialog box appears.

3. If you want to change the payment amount, type the new amount in the **Amount** box.

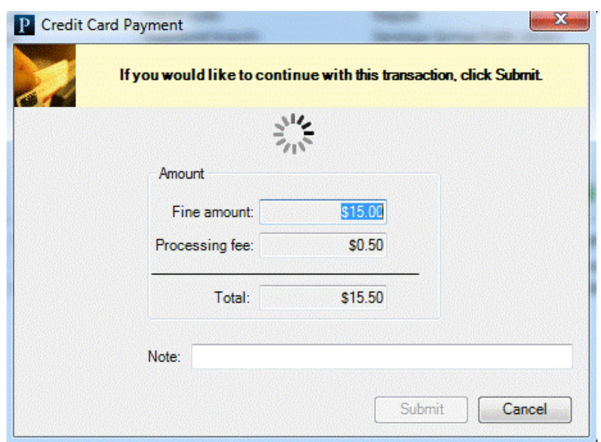
   Overpayment is not allowed for credit card payments. For details about partial payments, see "Pay charges from the Account view" on page 180.

4. Select **Credit card** in the **Method** box.

5. If you want to add a note about the transaction, type the information in the **Note** box.

6. Click **OK** on the Pay dialog box.

   The system checks whether the payment is an overpayment, which is not allowed, or under the minimal amount set for credit card transactions, and displays appropriate messages to stop the transaction in these cases. Otherwise, the Credit Card Payment dialog box opens.



Note:
You can add a note to the transaction. Entries in the Note field on this dialog box appear on the Polaris Store Order. For information about viewing credit card transactions and "orders," see "Managing Credit Card Orders" on page 193.

7. Click **Submit**.

   The system creates Store Order, Store Transaction, and Store Details entries with Pending status, sends the request to SmartPAY, and sends a query result request to SmartPAY every 5 seconds.

8. Pass the patron's credit or debit card through the SmartTerminal reader.

   When the card is authorized, the system notifies SmartPAY that the transaction is finished, the ILS Store Order is updated to Complete status and the ILS Store Transaction to Success status, and the patron account is updated.

   A confirmation message is displayed after a few seconds, and a receipt is generated according to the receipt setup for your workstation. For details about how the payment is recorded in the Patron Status workform - Account view, see "Pay charges from the Account view" on page 180. If your library has enabled e-mail credit card receipts in Polaris Administration, and there is a valid e-mail address in the patron's record, the patron receives an e-mail receipt for the transaction.

Related Information

View credit card transactions and issue refunds - See "Managing Credit Card Orders" on page 193.

Managing Credit Card Orders

Your library may accept credit card payments (orders) from the PAC, Polaris ExpressCheck, or the staff client for fines, donations to the library, and purchases. If your library processes credit card orders through the PayPal (VeriSign®) Payflow Pro service or the Comprise SmartPAY gateway, you can view transaction details and refund e-commerce payments using the Credit Card Payments Manager in the staff client. You can also refund credit card payments from registered patrons through the Patron Status workform - Account view. However, you cannot refund credit card payments as cash. The refund transaction always becomes a refund in the patron's credit card account.

The Credit Card Payment Manager shows only those orders and transactions where your workstation's log-on branch and the transacting branch use the same payment gateway (Payflow Pro or Comprise SmartPAY). If your library uses a different e-commerce gateway, refunds must be made through the gateway application and manually from the Patron Status workform - Account view.

Note:
For details about Polaris Administration settings for credit card processing, see "Setting Up E-Commerce" in the *Polaris Patron Services Administration Guide 4.1R2*.

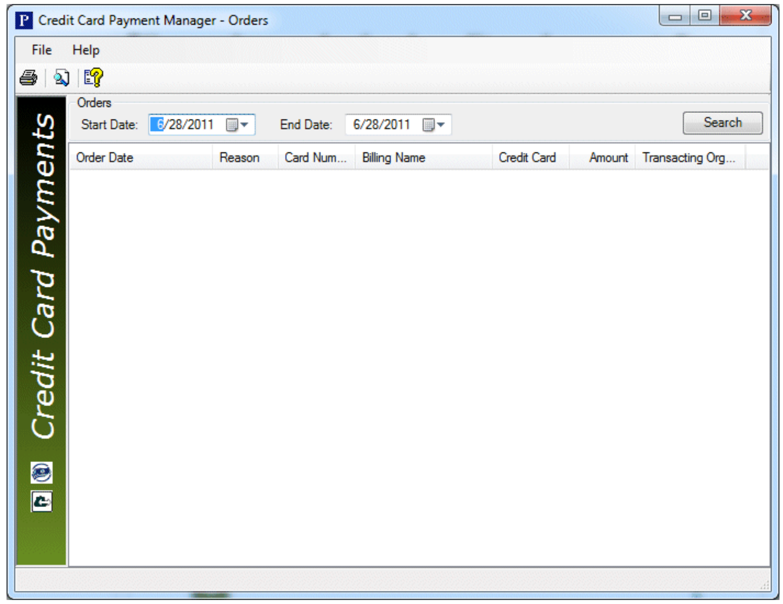
View orders and refund credit card payments

Follow these steps to view credit card orders and refund credit card payments from the Credit Card Payments Manager.

Note:
You need the system Circulation permission **Access Credit Card Payments Manager: Allow** to do this procedure.

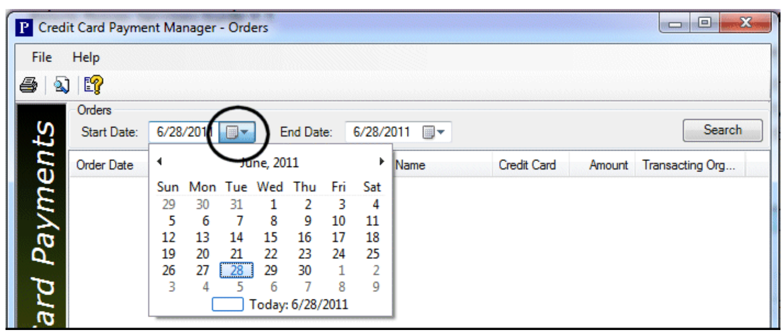
1. Select **Utilities, Credit Card Payments Manager** from the Polaris Shortcut bar.

   The Credit Card Payments Manager - Orders view opens.

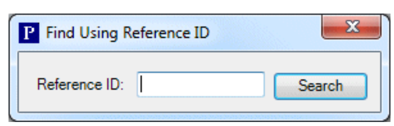


2. List credit card orders using one of these methods:

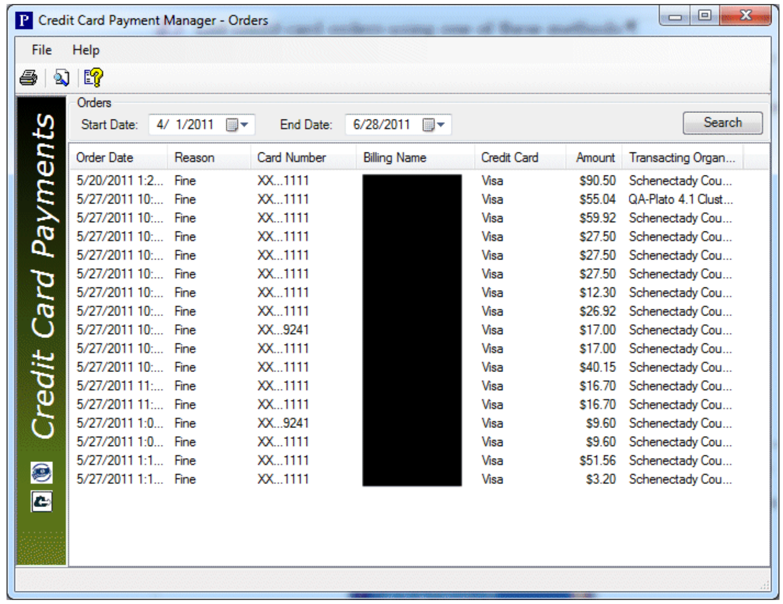
- Set the **Start Date** and **End Date** of the period for which you want to display credit card payments (orders). You can type the dates or click the down arrows and select the dates from the calendar. Then click **Search**.



- If you know the reference identification number of the payment—for example, the patron has brought in a credit card bill that lists the payment—click . The Find Using Reference ID dialog box appears. Enter the payment reference number and click **Search**.

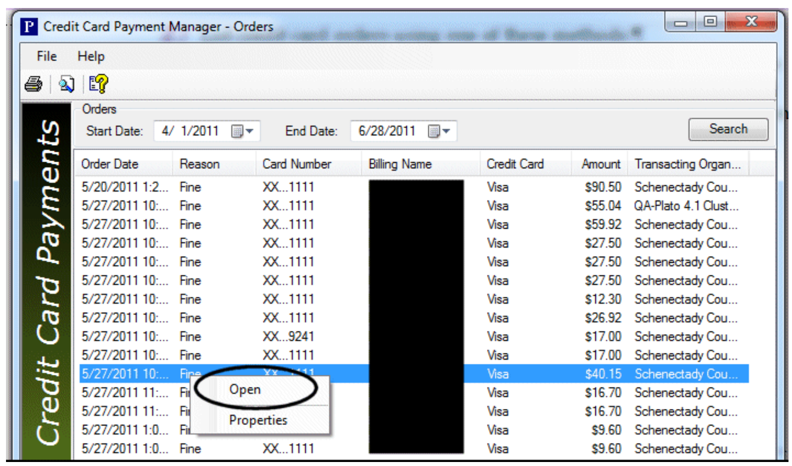


The workform lists the order search results.



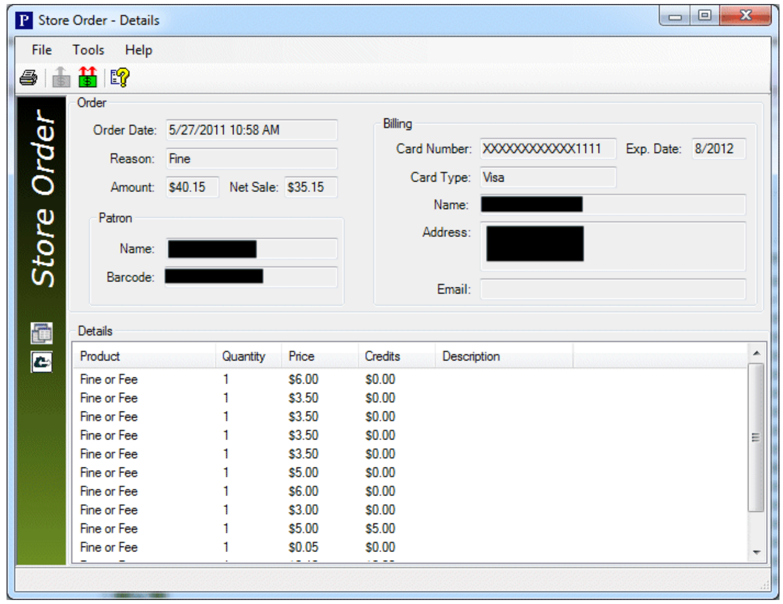
Tip:
You can see detailed information about an order without opening it. Right-click the order line item and select **Properties** from the context menu.

3. To open an order, right-click the order line item and select **Open** from the context menu.



The Store Order workform - Details view opens. This view shows the details about a single credit card order. For example, if the patron paid two fines in a single order, and credits were later issued on these fines, the Store Order workform lists both the fines and the credits.

Note:
The patron address is not displayed in the Store Order workform - Details view for payments made via Comprise SmartPAY.



4. To issue a refund on the credit card, select one of these options:

> **Note:**
> You need the Polaris permission **Fines: Allow refunds** to issue a refund on a credit card account. If the payment gateway is Comprise SmartPAY, a SmartTerminal must be connected to the workstation. The same card that made the payment must be used.

- **Refund one payment** - Select the payment (product) and click in the workform toolbar. Or right-click the selected payment, and select **Credit Refund** from the context menu.
- **Refund all payments** - Click in the workform toolbar.

> **Note:**
> If a transaction was voided, you see **VOID** in the **Net Sale** box, and you cannot select refund options. A transaction may be voided automatically if the credit card address information could not be verified.

If the payment gateway is Comprise SmartPAY, swipe the patron's card. Each refund requires a card swipe. If you are refunding three separate payments, you must swipe the card three times.

The credit receives a transaction reference number, and will be subtracted from the payer's credit card account balance. If the payment (product) was made by a library patron on a library-related charge such as an overdue fine, the credit transaction appears in the patron's Transaction Summary (Patron Status workform - Account view).

> **Note:**
> To see details about each transaction related to the order, click the Transactions view icon in the sidebar of the Store Order workform.

Related Information

- “Refund a credit card payment from Patron Status - Account view” on page 198
- “Taking Credit Card Payments” on page 188
- **Comprise SmartPay interface** - Comprise SmartPAY provides a SmartPAY API Staff User interface that an administrator can use to get a transaction report and credit or void transactions. See “SmartPAY Staff User Interface” in the *Polaris Patron Services Administration Guide 4.1R2*.

View credit card transactions

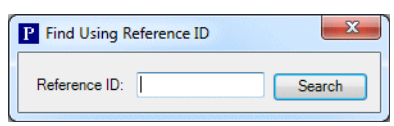
A credit card order may include payments (sales) and credits. Follow these steps to view any credit card transaction from the Credit Card Payments Manager.

> **Note:**
> You need the system Circulation permission **Access Credit Card Payments Manager: Allow** to do this procedure.

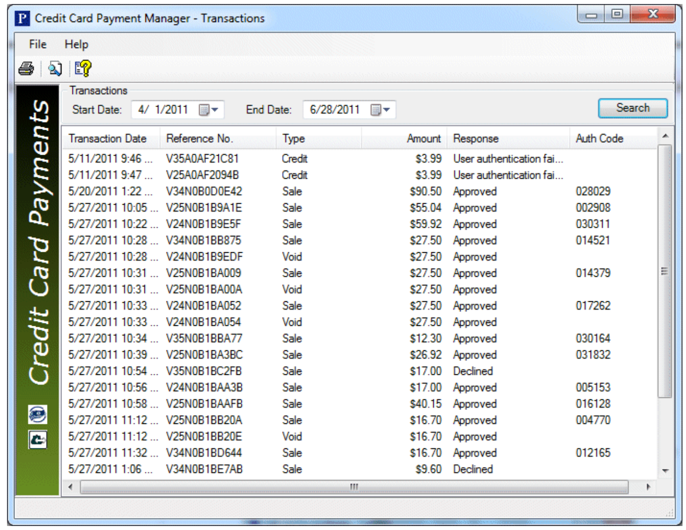
1. Select **Utilities, Credit Card Payments Manager** from the Polaris Shortcut bar.

   The Credit Card Payments Manager - Orders view opens.

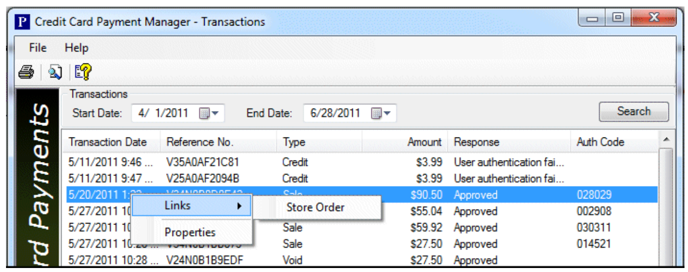
2. Click the Transactions icon  in the sidebar of the Credit Card Payments Manager workform.
3. List transactions using one of these methods:
   - Set the **Start Date** and **End Date** of the period for which you want to display credit card transactions. You can type the dates or click the down arrows and select the dates from the calendar. Then click **Search**.
   - If you know the reference identification number of the transaction, click . The Find Using Reference ID dialog box appears. Enter the transaction reference number and click **Search**.



   The workform lists the transaction search results.



4. To open the store order related to the transaction, right-click the transaction and select **Links, Store Order** from the context menu.



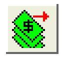
Refund a credit card payment from Patron Status - Account view

This refund method is convenient when you are working with a patron's account. Follow these steps to refund credit card payments from the Patron Status workform - Account view.

Note:
You need the Polaris permission **Fines: Allow refunds** to issue a refund on a credit card account, and credit card payments must be licensed for the Polaris staff client to refund a credit card payment by this method. If you need to refund a credit card payment made through PAC, and your library does not have a staff client license for credit card processing, you can refund the payment using the Credit Card Payments Manager. See "View orders and refund credit card payments" on page 193.

To refund credit card payments made through Comprise SmartPAY, both the branch that took the payment and the branch issuing the refund must use SmartPAY. A SmartTerminal must be connected to your workstation.

1. Open the patron's record in the Patron Status workform - Account view. See "Access the account data for a patron record" on page 175.

2. Click  or press **CTRL+T** to display the Transaction Summary dialog box.

   All reconciled transactions appear.

3. Select the appropriate payment or payments in the list. If you select more than one payment, all payments must be from the same order.
4. Right-click and select **Refund** from the context menu.

   The Credit Refund dialog box appears.

5. Type the amount to refund in the **Amount** box.

   You cannot make a partial refund if you selected more than one payment. You must refund the entire amount.

6. (Optional) Type a note describing the reason for the refund.
7. Click **OK**.

   A confirmation message is displayed. Click **Yes** to proceed with the refund.

   Note:
   If the amount of the refund exceeds the net sale, a message is displayed. You can credit the maximum amount, or close the message box to cancel the transaction.

   If your payment gateway is Comprise SmartPAY, swipe the patron's card in the SmartTerminal reader.

   The credit receives a transaction reference number, and will be subtracted from the patron's credit card account balance.

Related Information

- **Refunds from the Credit Card Payment Manager** - See "View orders and refund credit card payments" on page 193.
- **Non-credit card refunds** - See "Refund or credit completed payment transactions" on page 186.

Working with Deposits

Your library may require a deposit when a patron uses a valuable item, rents a room, or uses another library service. When the patron is finished with the service or item, you return all or part of the deposit. Deposits are tracked separately from the standard charge and pay transactions.

Note:
You need the Circulation permission **Create, return or forfeit a patron account deposit** to work with deposits.

1-2-3

Make a deposit in a patron's account

You can accept payment for a deposit, or transfer a credit balance to the deposit. Follow these steps to record a deposit in a patron's account.

1. Open the patron's record in the Patron Status workform - Account view. See "Access the account data for a patron record" on page 175.
2. If you are transferring funds from the credit balance to use for the deposit, select one or more credits in the Account Transaction list.
3. Click  above the Account Transaction list, or press **CTRL+D**. The Deposit dialog box appears.
4. Type the amount to deposit in the **Amount** box (maximum $2,000,000.00).

   If you selected a credit or credits in the Account Transaction list, you can change the **Amount** box to any amount less than the credit amount.
5. Select a payment method for the deposit in the **Method** box. If you are making a deposit from a credit, the method **Deposit from Credit** is already selected.
6. If you want to add a note to the transaction, type the information in the **Note** box.
7. Click **OK** on the dialog box. The workform appears with the deposit in the Account Transaction list, and the total amount of account deposits in the **Deposits** box.

Related Information

"Return, forfeit, or credit deposits" on page 201

Return, forfeit, or credit deposits

You reconcile deposits by return, forfeit, or credit transactions on one or more deposit line items. You can also do a partial return, forfeit, or credit. Follow these steps to return, forfeit, or credit deposits on a patron's account.

> **Note:**
> You cannot pay a charge on a patron account directly from a deposit. However, you can credit the deposit, and then use the credit balance to pay the charge.

1. Open the patron's record in the Patron Status workform - Account view. See "Access the account data for a patron record" on page 175.
2. Select the deposit or deposits in the Account Transaction list.
3. Choose one of the following options:
   - To return one or multiple deposits, click  above the Account Transaction list, or press **CTRL+R**.

     The Return dialog box appears.
   - To forfeit one or multiple deposits, click  above the Account Transaction list, or press **CTRL+F**.

     The Forfeit dialog box appears.
   - To credit one or multiple deposits, click  above the Account Transaction list, or press **CTRL+E**.

     The Credit dialog box appears.
4. If you want to partially return, forfeit, or credit the deposit, type the new amount in the **Amount** box.

   > **Important:**
   > If you chose to return, forfeit, or credit multiple deposits, you cannot change the number in the **Amount** box. You must return, forfeit, or credit the entire amount.
5. If you want to add a note to the transaction, type the information in the **Note** box.
6. Click **OK** on the dialog box.

   The Patron Status workform - Account view appears.
   - If a deposit was only partially returned, forfeited, or credited, the deposit still appears in the Account Transaction list with the new balance in the Balance column. The return, forfeit, or credit appears in the Transaction Summary dialog box.
   - If a deposit or deposits were returned, forfeited, or credited in full, the deposit or deposits no longer appear in the Account Transaction list. Instead, they appear in the Transaction Summary dialog box, along with the returns, forfeits, or credits.

Patrons in Collection

Your library may use a collection agency to encourage patrons to pay their fines or return borrowed items. Some collection agencies, such as Unique Management Services (UMS), manage all collection communications with patrons who have delinquent accounts. However, patrons in collection with UMS make all payments on their accounts directly to the library. For other collection agencies, the library may send a fine notice to the patron warning that the account will be turned over to collection in a specified period if the account is not cleared. Patrons may make payments on their accounts to the collection agency as well as the library.

When a patron owes an amount of money over a library-defined limit, and money has been owed longer than a library-defined period of time, the patron account goes into collection. This triggers the following events in Polaris:

- Polaris generates two reports in overnight batch processing and transmits them to the collection agency. The Submission report submits the delinquent patron information to the collection agency. The Update report contains the patron records already in collection which have had any activity (payment, waiver, or new charge) at the reporting organization since the last Submission or Update report was run.
- Polaris adds a collection fee, if specified, and a collection block to the patron record. The block appears at check-out and renewal in the staff client, the PAC, Polaris ExpressCheck, and SIP self-check. Polaris removes the block when the patron pays all the money that is owed to reporting organizations.

Patron accounts are reported to the collection agency for the amounts owed at reporting libraries only, not at libraries that do not use the collection agency function. The accounts remain in collection until the patrons have paid off the amount at each reporting library. Amounts due may include charges of all types, replacement costs, processing fees, and collection fees.

Excluding or Including Patrons

You can prevent a particular patron from being reported to the collection agency. Select the **Exclude from collection agency** check box on the Patron Registration workform - General view. See “Add general data to a patron record” on page 30. Through Polaris Administration, a particular patron who would not otherwise be reported can be *included* in collection. See “Managing Collection Agency Services” in the *Polaris Patron Services Administration Guide 4.1R2*.

Getting Patron Accounts Out of Collection

A patron's account is out of collection when the patron no longer owes money, including fines incurred after the reporting, to any reporting libraries. The patron may still owe money to libraries that do not use the collection agency function. If the patron's account is paid down to $0.00, but the patron incurs a new fine *before* the collection agency Update report is run, the patron's account is still in collection. For more information about collection agency reporting, see "Collection Processing Reports" in the *Polaris Patron Services Administration Guide 4.1R2*. In addition, you can manually remove a patron account from collection. See "Remove a patron account from collection" on page 203.

Display a collection summary and history

Follow these steps to view the total amount submitted to collection for a patron by each reporting library, and to view specifics about each reporting library's collection submission.

1. Open the patron's record in the Patron Status workform - Account view. See "Access the account data for a patron record" on page 175.

2. Click  or press **CTRL+A** to display the Collection Summary dialog box.

   The patron's collection summary appears. The line item for each library includes the patron's collection status, amount due, balance, and date submitted to collection.

3. To view details about a transaction, right-click the transaction, and select **History** from the context menu.

   The Transaction History dialog box appears.

Related Information

Collection agency set-up and processing - See "Managing Collection Agency Services" in the *Polaris Patron Services Administration Guide 4.1R2*.

Remove a patron account from collection

Under special circumstances, you may want to remove a patron's account from collection even though there has been no account activity. Follow these steps to remove an account from collection manually.

> **Important:**
> You need the Circulation permission **Remove collection agency block: Allow** to do this procedure. See "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*. If you manually remove a patron's account from collection, you must inform the collection agency. The removal is not recorded in any automatic reporting functions for collections.

1. Open the patron’s record in the Patron Status workform - Account view. See “Access the account data for a patron record” on page 175.
2. Click  to display the Collection Summary dialog box.

   The patron’s collection summary appears.
3. Select the line item or items for which the patron should be removed from collection.
4. Click **Remove From Collection**.
5. Click **Close**.

   The dialog box closes.
6. Inform the collection agency that the patron’s account has been taken out of collection.

Patron Financial Reports

Patron Financial reports can assist you in processing and evaluating patron financial transactions. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Patron Financial** in the Polaris Reports dialog box.

- For information on generating reports, see "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*.
- For detailed descriptions of specific Patron Financial reports, see "Patron Financial Reports" in the *Polaris Basics Guide 4.1R2*.

Working with Hold Requests

When a patron wants a title that is not available at your library, but is owned by your library system, you or the patron can place a request for the title (title-level hold) or a specific copy of the title (item-level hold). Your library may also allow first available copy requests on a specific issue of a serial or a specific part of a multi-part set.

The request is then sent to designated libraries in a specified order through Requests-To-Fill (RTF) processing. A library can choose to fill or deny a request. To fill a request, the library checks in the item and sends it to the pickup library. Then, the item is checked in at the pickup library and held for the patron.

The RTF process is one way that hold requests are filled. In addition, whenever an item that fills a hold request is scanned at circulation, you see an alert message with appropriate instructions. If an item is scanned at the request's pickup library, you typically hold the item. If an item is scanned at any other library, you typically ship the item to the pickup library.

Your library sets holds processing options in Polaris Administration. See "Setting Up Holds and ILL Request Processing" in the *Polaris Patron Services Administration Guide 4.1R2*. Specific permissions are required to create and work with hold requests. See "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*.

This unit covers the following topics:

Placing Hold Requests

You can request one or multiple titles for a patron, or the same title for multiple patrons. You can also request specific items, and your library may also allow first available copy requests on a specific issue of a serial or a specific part of a multi-part set. A hold request can be placed on any bibliographic or item record, unless the record is provisional (incomplete) or an item is restricted from holds in some way.

Note:
3M ebooks cannot be requested from the staff client, and the requests are not displayed in the staff client. The patron must request these titles from PAC, where the requests are displayed in the patron account Requests page. See "Requesting 3M Integrated Ebooks from PAC" in the *Polaris Public Access Administration Guide 4.1R2*.

Hold Request Messages and Blocks

Messages and blocks may appear as you create hold requests:

- **All items attached to this title are restricted from filling requests** - If you click **Yes** to place the request, the request is saved as Active, which means the system will keep looking for items to fill the request. You can cancel an active request, or convert it to an interlibrary loan request. Click **No** to stop saving the request.
- **Title:** ***Title Name*** **This item is restricted from filling requests** - Click **Yes** to place the request with a Not Supplied status. Click **No** to stop saving the request.
- **Patron has exceeded request limit for** ***Title Name*** - Click **Yes** to place the request with an Active status. Click **No** to stop saving the request.
- **Item Blocks dialog box** - Click **Yes** to override the block and create the item request. Click **No** to stop creating the request. See "Working with Blocks (Stops)" on page 116.
- **Items are not available to fill the request for the following reasons** - Click **Yes** to place the request with an Active status. Click **No** to stop saving the request.
- **No items are attached to the bibliographic record** - Click **Yes** to place the request with an Active status. Click **No** to stop saving the request. A Polaris Administration setting controls whether this message appears or the request is placed automatically. See "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **First available copy messages** - Your library may allow first available copy requests on specific issues of serials or specific parts of multi-part titles (such as Season One of a television series on DVD). Polaris Administration settings control these features. See "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*.

- **The item is in** - The item is available in the library. Click **Yes** to place the request. Click **No** to stop saving the request.
- **No matching patron record was found** - Click **OK**, and check the patron barcode. To express-register a patron, see page 102.
- **Patron blocks dialog box** - You can override the blocks and place the request, or cancel the request. From this dialog box, you can also view the Patron Status and the Patron Registration workforms to see more details about the blocks, and perhaps resolve them. For more information about blocks, see "Working with Blocks (Stops)" on page 116.
- **Duplicated Requests dialog box** - Click **Yes** to place a duplicate request for the patron. Click **No** to stop saving the request.
- **Outreach services patron** - This note may be displayed for the hold request if your library uses Polaris outreach services. It indicates that the hold request is for an active outreach services patron. See "Outreach Services Processing" on page 274.

Place single or consecutive hold requests

After you have saved a hold request, you can place another request for the same patron or title using much of the information from the saved request. Follow these steps to place a single hold request or multiple hold requests consecutively. (For information on messages that may appear, see "Hold Request Messages and Blocks" on page 207.)

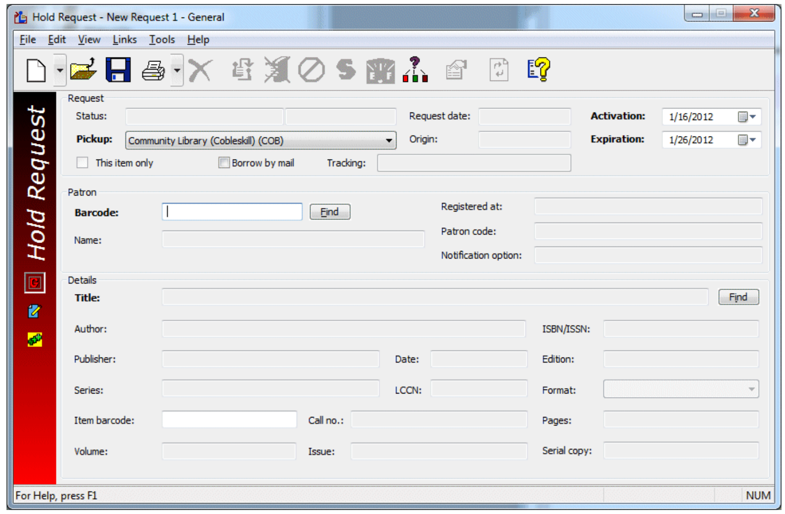
Tip:

Click to display the Hold Request workform. This button appears on any workform where you can also select **Tools, Place Hold**. On the Check Out, Check In, and Patron Status workforms, you can press **CTRL+H**.

1. Open the Hold Request workform from one of the following locations:
   - **Bibliographic record** - Select **Tools, Place Hold** from the menu bar.
   - **Check In workform** - Select **Tools, Place Hold** from the menu bar.
   - **Check Out workform** - Select **Tools, Place Hold** from the menu bar.
   - **Find Tool Results list (patron, bibliographic, or item records)** - Right-click a record, and select **Place Hold** from the context menu.
   - **Holds Queue** - Click . For information about working with the Holds Queue, see "Managing the Holds Queue" on page 225.
   - **Item Record** - Select **Tools, Place Hold** from the menu bar.
   - **Patron Registration workform** - Select **Tools, Place Hold** from the menu bar.
   - **Patron Status workform** - Select **Tools, Place Hold** from the menu bar.
   - **Polaris Shortcut Bar** - Select **File, New** from the Shortcut Bar. Then select **Hold Request** from the New dialog box, and click **OK**.
   - **Request Manager (Hold Requests view)** - Click . For information about working with the Request Manager, see "Daily Request Processing" on page 234.
   - **Purchase Order workform, Line Items view** - Right-click a line item and select **Place Hold** from the context menu.

- **Purchase Order Line Item workform** - Select **Tools, Place Hold** from the menu bar.

The Hold Request workform appears.



2. In the **Pickup** box, select the branch where the patron wants to pick up the item.

   Note:
   The **Borrow by mail** and **Tracking number** fields are used by libraries that check out and send requested materials to patrons. See "Borrow By Mail Circulation" on page 260.

3. In the **Activation** box, select the date when the hold request should be activated.

   The activation date determines when items can trap to fill the request.

4. In the **Expiration** box, select the date after which the requested item is not needed.

5. To input or change the requesting patron, use one of the following methods:
   - Scan or type the patron's barcode in the **Barcode** box.
   - Click Patron **Find** to do a patron record search, right-click the record in the Results list, and choose **Select** from the context menu.

     The **Name**, **Barcode**, **Code**, and **Registered at** boxes are filled in.

Tip:
To preview a bibliographic record and the items linked to it before you select it for the hold request, right-click the record in the Find Tool results list, and select **Preview** from the context menu.

6. To select a title for the hold request, click Title **Find** to do a bibliographic or item record search, right-click the record in the results list, and choose **Select** from the context menu.

   Note:
   If you select a bibliographic-level serial title or a title with multiple parts and your library allows first available copy requests, a message appears. If the bibliographic record includes issue designations, you can select a specific issue. If there are no issue designations, you can select a specific item. If the bibliographic record is not a serial, but it has volume data, you can select a specific volume.

   The applicable boxes in the Details frame are filled in.

Note:
You can also specify the title by typing its information. However, you must unlock the hold request. This is risky, since the request may not be filled if the information does not match the database. Also, you cannot lock a request after unlocking it. To use this method, select **Tools, Unlock Request**. A message indicates that the request may not be filled. Click **Yes** to continue. All the boxes in the Details frame, except **Item barcode**, are available for editing. Type the title's information in the appropriate boxes.

7. If you want to enter notes for the hold request, select **View, Notes** or click  to display the Notes view, and type the note as follows:

   - If you want a note to appear on the hold slip, type the information in the **Staff Display** box. This note is also displayed in a message to staff when an item is trapped for a hold at circulation.

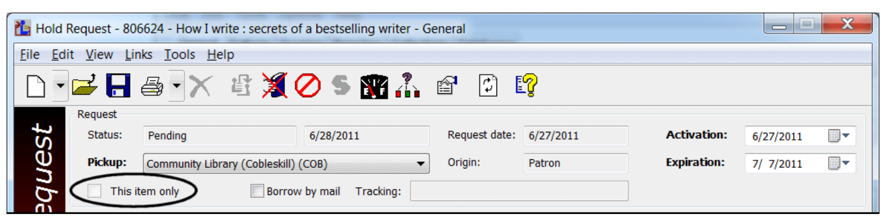
     Note:
     The library may set default text for this note for Borrow by Mail Requests. See "Placing Borrow by Mail Requests" on page 261.

   - If you want a note to be viewed online by staff only, but *not* appear on the hold slip, type the information in the **Non-public** box.
   - If you have the Circulation permission **Modify PAC display note: Allow,** you can add or modify the PAC display note on the Hold Request workform - Notes view. This note is available to patrons in the PAC patron account - Requests page.

     Note:
     The library may set default text for this note for Borrow by Mail Requests. See "Placing Borrow by Mail Requests" on page 261.

8. Select **File, Save** to save the request.

   The **Status** (**Active**) and **Request date** boxes are filled in. For item requests, the **This item only** check box is selected.



   If the hold request includes a note, the Notes view icon is yellow .

   On the Notes view, the **Request Satisfied By** list displays the items that can fill the hold request.

   Important:
   If you are placing more requests for the same patron or title, do not close the workform. Go to step 9.

9. If you want to place another request, choose one of the following options:

   - **Same title, different patron** - Select **File, New, Patron**, or press **CTRL+G**.

A new Hold Request workform appears with the same information in the Details frame boxes. The Patron frame boxes are blank.

- **Different title, same patron** - Select **File, New, Title**, or press **CTRL+H**.

  The saved request closes. A new Hold Request workform appears with the same information in the Patron frame boxes. The Details frame boxes are blank.

- **Different title, different patron** - Select **File, New, Blank**, or press **CTRL+N**.

  A new blank Hold Request workform appears.

Related Information

- **Item holdability** - Holdability is an item's eligibility to be trapped for a hold request. A specific item may be holdable without restrictions, with specified restrictions, or not holdable under any conditions. The Item Record workform - Circulation view indicates an item's holdability status. In addition, your library may prevent items with selected circulation statuses from being held. See "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Items relinked to a new bibliographic record** - If an item is linked to a different bibliographic record after an item-level hold request is placed, the hold request is updated with the new bibliographic information.
- **Request history** - You can see the request's status as it passes from branch to branch in the request-to-fill (RTF) cycle. Each time the request passes to a different branch, the status is displayed as Pending. On the Hold Request workform, select **View, Notes**. Request history information is located at the bottom of the Notes view. For Pending requests, the Branch column lists the current branch in the RTF cycle that has an item eligible to fill the request. For example, if the status is Pending and Library A is the listed branch, the request appears on Library A's requests-to-fill report. For more information about RTF processing, see "Daily Request Processing" on page 234.
- **Multiple hold requests** - You can request one title for multiple patrons, or multiple titles for one patron, at the same time. See "Place hold requests - multiple patrons, one title" on page 212 and "Place hold requests - multiple titles, one patron" on page 213.
- **Grouping holds** - You can group a patron's related holds so that when one request is filled, the others in the group are cancelled. See "Group a patron's hold requests" on page 223.
- **Patron-initiated hold requests** - Your library may allow patrons to place hold requests from the PAC. See PAC online Help.
- **Borrow By Mail** - On the Hold Request workform, the **Borrow by mail** and **Tracking number** fields are used by libraries that check out and send requested materials to patrons. See "Borrow By Mail Circulation" on page 260.

Place hold requests - multiple patrons, one title

If your library has patrons fill out request slips that you set aside for later processing, and several patrons have requested the same title, you can request the title once for all the patrons who want it. Follow these steps.

1. On the Hold Request workform, fill in the **Pickup** box, **Activation** box, and **Expiration** box. See “Place single or consecutive hold requests” on page 208.

   If you want to use a different pickup branch, activation date, or expiration date for a particular patron, you must change the setting for that patron’s request after all the requests are created.

2. Select multiple patrons by doing the following steps:

   a) Click the patron **Find** button to search for the first patron record.

   b) Select the appropriate records in the results list.

   You must select more than one patron to set up the multiple request. You can delete patrons from the multi-request later (see step 3).

   c) Right-click in the results list, and choose **Select** from the context menu.

   The Multi-Request view appears with the selected patrons in the Patrons list. The Patrons list includes each patron’s name, barcode, registration library, and patron code.

3. To edit the patron list, choose one of the following options:
   - To add a patron to the list, click or press **CTRL+R** to do a patron record search. Right-click the patron in the results list, and choose **Select** from the context menu.
   - To remove one or more patrons, select the patrons in the Patrons list, and click or press **CTRL+E**.

4. To select a title, do the following steps:

   a) Click or press **CTRL+T** to do a bibliographic (or item) record search.

   b) Right-click the record in the results list, and choose **Select** from the context menu.

   The Multi-Request view appears with the selected title in the Titles list. For a bibliographic record, the title and author are included. For an item record, the title, author, material type, assigned branch, call number, and barcode are included.

   Note:
   If you want to select a different title, select the title in the Titles list, click or press **CTRL+M** to delete it, and click to do a bibliographic record search.

5. If you want to input notes, fill in the appropriate boxes on the Notes view. See step 7 in "Place single or consecutive hold requests" on page 208.

   If you want a different note for a specific request, you must change that request's note after all the requests are created.

6. Select **File, Save** to save the requests.

   The requests are saved as several individual requests. The **Status** (**multi-request**) and **Request date** boxes are filled in. For item requests, the **This item only** check box is selected.

7. If you want to edit a request, close the Hold Request workform and open the request. See "Edit hold request data" on page 228.

   You must edit the requests individually. You cannot edit all the requests at the same time.

Related Information

- **Request one title for one patron** - See "Place single or consecutive hold requests" on page 208.
- **Request multiple titles for one patron** - See "Place hold requests - multiple titles, one patron" on page 213.
- **Messages/dialog boxes** - See "Hold Request Messages and Blocks" on page 207.

Place hold requests - multiple titles, one patron

Sometimes it is convenient to request multiple titles for one patron at once. For example, a patron may request several volumes in a series. Follow these steps to request multiple titles for one patron.

1. On the Hold Request workform, fill in the **Pickup**, **Activation**, and **Expiration** boxes. See steps 1-4 in "Place single or consecutive hold requests" on page 208.

   If you want to use a different pickup branch, activation date, or expiration date for a request, you must change the setting for the request after all the requests are created.

2. To specify or change the requesting patron, choose one of the following options:
   - Scan the patron's barcode in the **Barcode** box.
   - Click Patron **Find** to do a patron record search, right-click the record in the Results list, and choose **Select** from the context menu.

     The **Name**, **Barcode**, **Code**, and **Registered at** boxes are filled in.

3. Select multiple titles by doing the following steps:

Tip:
You can set the Find Tool to return multiple titles of interest in the same results list. For example, to find multiple titles by the same author, set Search by to Author in the Find Tool. Click the Title Find button to search for the first titles.

a) Select the appropriate records in the Results list.

You must select more than one title to set up the multiple request. You can delete titles from the multi-request later (see step 4).

b) Right-click in the Results list, and choose **Select** from the context menu.

The Multi-Request view shows the selected patron in the Patrons list and the selected titles in the Titles list. For bibliographic records, the title and author are included. For item records, the title, author, material type, assigned branch, call number, and barcode are included.

4. If you want to modify the Titles list, choose one of the following options:

- To add one or more titles, click or press **CTRL+T** to do a bibliographic record search. Select the appropriate titles in the results list, right-click in the results list, and choose **Select** from the context menu.
- To remove one or more titles, select the titles in the Titles list, and click or press **CTRL+R**.

Note:
If you want to select a different patron, select the patron in the Patrons list, click to delete the entry, and click to do a patron record search.

5. If you want to input notes, fill in the appropriate boxes on the Notes view. See "Place single or consecutive hold requests" on page 208.

If you want a different note for a specific request, you must change that request's note after all the requests are created.

6. Select **File, Save** to save the requests.

The requests are saved as several individual requests. The Status (**multi-request**) and **Request date** boxes are filled in. For item requests, the **This item only** check box is selected.

7. If you want to edit a request, close the Hold Request workform and open the request. See "Edit hold request data" on page 228.

You must edit the requests individually. You cannot edit all the requests at the same time.

Related Information

- **Grouping holds** - You can group a patron's related holds so that when one request is filled, the others in the group are cancelled. See "Group a patron's hold requests" on page 223.
- **One title for one patron** - See "Place single or consecutive hold requests" on page 208.
- **One title for multiple patrons** - See "Place hold requests - multiple patrons, one title" on page 212.
- **Messages/dialog boxes** - See "Hold Request Messages and Blocks" on page 207.

Displaying Hold Requests

You can display a specific patron's hold requests, or any hold requests that meet selected criteria. The status of a hold request indicates the stage it has reached in holds processing:

> **Note:**
> The library may specify its own names for these hold request statuses. See "Specifying Hold Status Descriptions" in the *Polaris Patron Services Administration Guide 4.1R2*.

- **Active** - When a hold request is placed in the queue, its status is automatically set to Active. All items that can fill the hold request are bound to it, and the items can be trapped to fill the request. The system is actively looking for items to fill the request. You can cancel an active request, or convert it to an interlibrary loan request.
- **Cancelled** - Cancelled hold requests remain in the database and visible on Polaris workforms. A Cancelled request cannot be filled. However, you can reactivate or delete it.
- **Expired** - If a hold request is not filled within the specified period of time, the request status automatically changes to Expired. (The current date is later than the Expiration date on the Hold Request workform.) An Expired request cannot be filled. However, you can reactivate or delete the request, or convert it to an interlibrary loan request. You can run a report that lists Expired hold requests. See "PAC Reports" in the *Polaris Basics Guide 4.1R2*.
- **Held** - A Held request indicates that an item has been trapped to fill the request, and the item's circulation status is also Held. The item is ready for the patron to pick up.
- **Inactive** - An Inactive hold request has an activation date in the future. The request does not appear in the queue, and an item cannot be trapped to fill the request until the activation date. You can cancel or delete an Inactive request, or convert it to an interlibrary loan request.
- **Not-supplied** - If no items can fill the request (for example, if no items are attached to the bibliographic record), the request status is Not-supplied. You can delete the request or convert it to an interlibrary loan request. You can also reactivate a Not-supplied request, but if the reason it was not supplied has not changed, the request becomes Not-supplied again.
- **Out** - An item has been linked to the hold request, and the item's circulation status has changed to Out. This status is useful in keeping track of items requested and circulated by Borrow by Mail. See "Borrow By Mail Circulation" on page 260. Your library may also choose to enable it even if you do not offer Borrow by Mail.
- **Pending** - When an Active request can be filled by an item with a status of In at your library, or the request has been routed to another library that has the item with a status of In, the status changes to Pending. If none of the items there have a status of In, the request keeps its Active status, and items can be trapped to fill the request.

- **Shipped** - A Shipped hold request status indicates that an item was trapped at a branch other than the pickup branch, and is being shipped to the pickup branch.
- **Unclaimed** - If the requesting patron does not pick up the held item within the specified period of time, the hold request status automatically changes from Held to Unclaimed. (The current date is later than the Unclaimed date on the Hold Request workform.) You can run a report that lists Unclaimed items. See "PAC Reports" in the *Polaris Basics Guide 4.1R2*.

Note:
The unclaimed date is determined by the **Maximum days held for pickup** setting for **Holds options** (Request parameters) in Polaris Administration; dates closed and hours of operation (days closed) are included in the calculation. The item becomes available to circulate or to trap for the next request. Your library system chooses whether to delete or cancel unclaimed requests automatically when the held item is checked in. See "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*.

1-2-3

Display a patron's hold requests

Follow these steps to display the hold requests for a specific patron.

1. Select **Circulation, Patron Status** to find and display the patron's record in the Patron Status workform. See "Find patron services and related records" on page 14.

2. Select **View, Holds** or click to display the Requests view.

   The patron's hold requests appear in the Polaris requests list.

   - If your library allows item-level or first-available-copy requests, these are indicated by the item-level icon at the beginning of the request line.
   - If your library does Borrow by Mail circulation, these requests are indicated by the Borrow by Mail icon at the beginning of the request line. Item-level Borrow by Mail requests include an I in the Borrow by Mail icon.
   - The Queue column displays the patron's position in the holds queue for a title or item.

     Example:
     If a patron places a request for a title and four other requests are pending for that same title, the Queue column displays **5**, indicating that the patron's request is fifth in line.

     Certain administration settings for your library may affect a request's queue position, so that requests are not always filled in strict date and time order. See "Setting Up Holds and ILL Request Processing" in the *Polaris Patron Services Administration Guide 4.1R2*.

     To change the patron's queue position, you must reorder the hold requests for the title or item in the Holds Queue workform. See "Rearrange hold requests in the queue" on page 225.

Tip:
If an item in the list is a serial, the serial designation (enumeration and chronology) is added to the title. You may need to expand the title column to see the designation.Similarly, you may need to manually expand the call number column (drag the right border of the column header) to see the entire call number.

The top left portion of the Patron Status workform summarizes the patron's hold requests. The **Items Held** field reports the total number of items with a status of Held, and includes Hold requests and ILL requests with a status of Held or Unclaimed. (Unclaimed hold requests are linked to items that are still Held, so the count reflects the items actually on the pickup shelf.) The **Total holds/ILL** field reports all hold requests/ILL requests regardless of status, including held requests. The same information appears on the Check Out workform.

Related Information

- **Change the unclaimed date** - You can change the unclaimed date for a hold request when the request status is Held. See "Edit hold request data" on page 228.
- **Grouping holds** - You can group a patron's related holds so that when one request is filled, the others in the group are cancelled. See "Group a patron's hold requests" on page 223. The Group column identifies group membership of a hold. You may need to scroll to the right to display the Group column.
- **Requests in the PAC patron account** - Patrons can view and manage their hold requests in the PAC. The header area of PAC patron account pages displays a summary count of the patron's requests, and patrons can view detailed information, cancel, and reactivate their requests on the requests page. For more information, see the *Polaris PowerPAC Guide*.

Display hold requests by selected criteria

You can view hold requests by selecting criteria on the Request Manager workform - Hold Requests view. This is the method you typically use to manage holds at your branch. Follow these steps to display hold requests by selecting associated criteria.

1. Select **Circulation, Request Manager** from the Polaris Shortcut Bar.

   The Request Manager workform - Hold Requests view appears.

   Note:
   By default, when the view opens, all pending requests for your branch are listed. These are the requests you fill or deny in daily holds processing. See "Daily Request Processing" on page 234.

Tip:
You can open the Polaris Find Tool from the Request Manager workform to search for any hold request. Select **File, Open** on the Request Manager menu bar.

2. Select a library in the **Branch name** box and one of the following options in the **By** box, according to the requests you want to display:
   - **Item** - Displays requests for items that are owned by the selected library
   - **Patron** - Displays requests for patrons who are registered at the selected library
   - **Pickup** - Displays requests to be picked up at the selected library

Tip:
If an item in the list is a serial, the serial designation (enumeration and chronology) is added to the title. You may need to expand the title column to see the designation.

3. Select a hold request status in the **Status** box. For status descriptions, see "Displaying Hold Requests" on page 216.

   The Request Manager displays the requests matching your criteria, in the Requests list.

   - If your library allows item-level or first-available-copy requests, these are indicated by the item-level icon at the beginning of the request line.
   - If your library does Borrow by Mail circulation, these requests are indicated by the Borrow by Mail icon at the beginning of the request line. Item-level Borrow by Mail requests include an I in the Borrow by Mail icon .

   Examples:
   -To display all **Held** hold requests where Community Library is the pickup branch, select the following criteria: **Community Library** (**Branch name** box), **Pickup** (**By** box), and **Held** (**Status** box).
   -To display all unclaimed hold requests (that is, held requests that were not picked up) where Community Library is the pickup branch, select the following criteria: **Community Library** (**Branch name** box), **Pickup** (**By** box), and **Unclaimed** (**Status** box).

   Column headings for the Requests list and the available option buttons vary, depending on your selections. The workform's status panel (lower right corner) displays the date/time of the last binding and the date/time of the last RTF (Requests-To-Fill) cycle. For more information about RTF processing, see "Daily Request Processing" on page 234.

Related Information

- **Local hold request report** - You can run a report that lists requests for which a specific branch is the pickup library. See "PAC Reports" in the *Polaris Basics Guide 4.1R2*.
- **Borrow by Mail processing** - See "Borrow By Mail Circulation" on page 260.

Find hold requests

Follow these steps to find hold requests using the Polaris Find Tool.

Note:
If an item is linked to a different bibliographic record after an item-level hold request is placed, the hold request is updated with the new bibliographic information.

1. Select **Circulation, Hold Requests** from the Polaris Shortcut Bar, or click .

   The General tabbed page of the Find Tool appears. **Hold Requests** is selected in the **Object** box.

Tip:
For fast navigation, press the **TAB** key to move among the **Object**, **Search by**, **Type**, **For**, **Limit by**, and **Values** boxes. Type the first letter of the search option in the **Object**, **Search by**, **Type**, and **Limit by** boxes.

2. Select the criterion to search by in the **Search by** box.

   Note:
   If you often search by the same criteria but they are not the default settings, you can save your own settings by selecting **Options, Save as User Default** from the Find Tool menu bar. See "Finding Polaris Records" in the *Polaris Basics Guide 4.1R2*.

3. Select the type of search in the **Type** box.
4. If you want your search results to be sorted, select the **Sort by** check box and select a value.
5. Type a search string in the **For** box.

   Note:
   If you are searching by ISSN, include a dash in your search string if the ISSN is stored with a dash. Or use a wildcard character (*) before the dash and eliminate the rest of the ISSN.

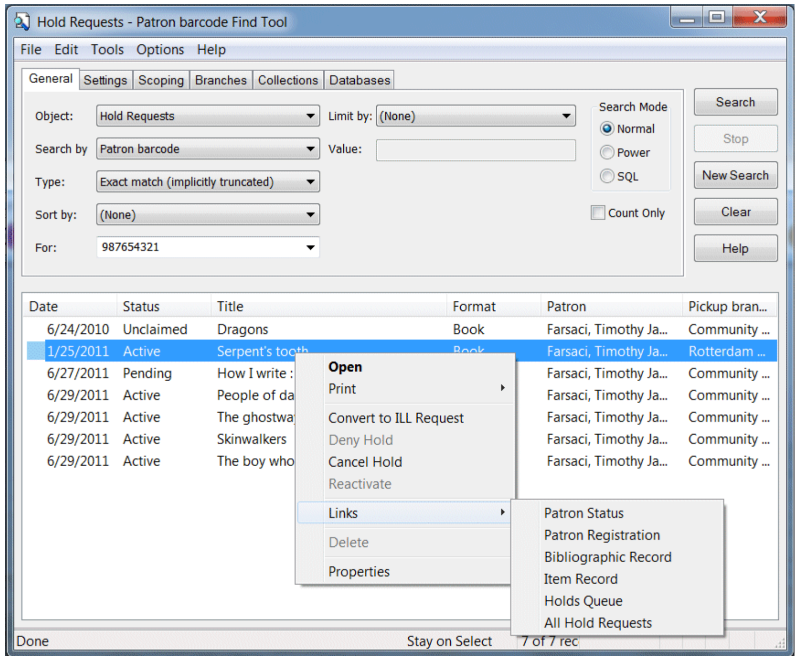
6. If you want to focus the search, select a limiter in the **Limit by** box, and set a value for the limiter in the **Value** box.
7. Click **Search** to begin the search, or press **ENTER**.

   Your results appear in the results list at the bottom of the Find Tool window. To load all the results in a large results list, press **CTRL+SHIFT+A**.

   Note:
   If you searched in **Normal** mode by **Activation date**, **Expiration date**, or **Unclaimed date**, the appropriate date appears in the Date column of the search results list. All other hold request searches display the request date in the Date column.

Tip:
If an item in the list is a serial, the serial designation (enumeration and chronology) is added to the title. You may need to expand the title column to see the designation.

8. Do one of the following actions to work with an item in the results list:
   - Double-click a request line item to open the hold request.
   - Right-click a request line in the results list to work with the request without opening it. The context menu displays the available options. Among other options, you can link to associated patron, bibliographic, or item records, to the holds queue for the associated title or item, or to all hold requests linked to the same title or item.



Display requests linked to a bibliographic or item record

You can view all the hold requests linked to a bibliographic or item record, regardless of request status, and work with those requests. Follow these steps to see all the hold requests linked to a bibliographic or item record.

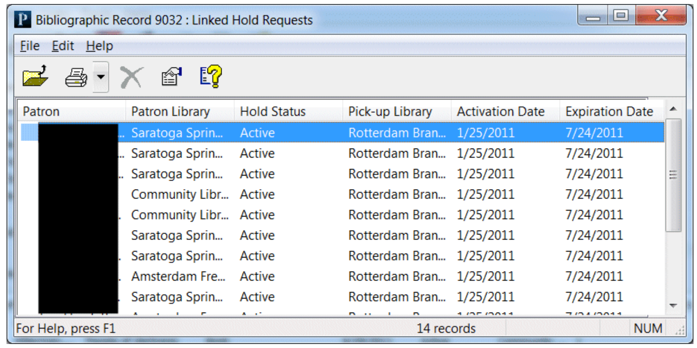
Note:
If an item is linked to a different bibliographic record after an item-level hold request is placed, the hold request is updated with the new bibliographic information.

1. Open the list of linked requests by one of these methods:
   - **Bibliographic or Item Record workform** - Select **Links, All Hold Requests** from the menu bar.
   - **Hold Request workform** - Select **Links, All Hold Requests** from the menu bar.
   - **Holds Queue** - Select **Links, All Hold Requests** from the menu bar.

     Note:
     For more information about the Holds Queue for a title or item, see "Managing the Holds Queue" on page 225.
   - **Patron Status workform - Requests view** - Right-click the request, and select **Links, All Hold Requests** from the context menu.
   - **Find Tool results - hold requests** - Right-click the request, and select **Links, All Hold Requests** from the context menu. For more information about finding hold requests, see "Find hold requests" on page 219.

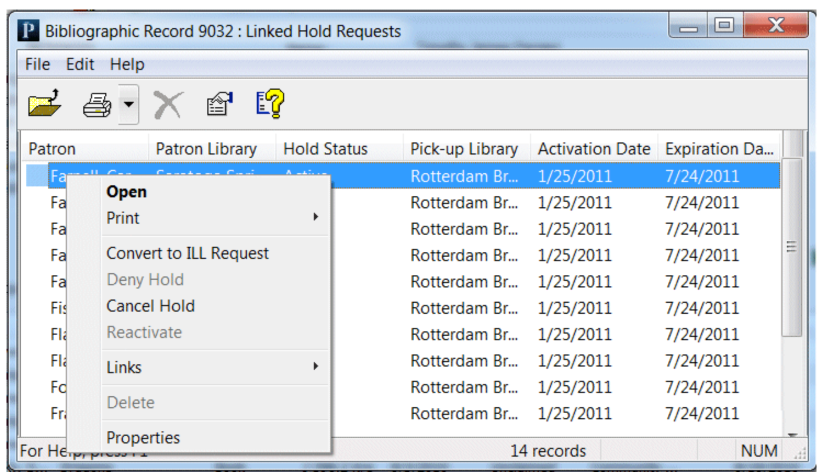
   The Linked Hold Requests dialog box opens. The dialog box lists the hold requests associated with the record. Item-level and first-available-copy requests are indicated by the item-level icon.

Borrow by Mail requests are indicated by the Borrow by Mail icon . Item-level Borrow by Mail requests include an I in the Borrow by Mail icon .



Note:
If only one request is associated with the record, the Hold Request workform opens for that request.

2. Double-click any line item to open the hold request, or select one or more line items and right-click to choose options from the context menu.



Related Information

- "Rearrange hold requests in the queue" on page 225
- "Cancel hold requests" on page 231
- "Delete hold requests" on page 232
- "Reactivate hold requests" on page 233

Grouping a Patron's Hold Requests

If a patron wants any one of several requested titles, you can group the related hold requests. When one of the grouped requests is filled, Polaris automatically deletes the other requests in the group because they are no longer needed. The group is counted as a single request against the patron's total request limit.

Group a patron's hold requests

You can group hold requests with a status of Active, Inactive, or Pending. A group can contain requests with any or all these statuses, and you can add any number of hold requests to an existing group. Follow these steps to group hold requests.

1. Open the patron's record in the Patron Status workform - Requests view. See "Display a patron's hold requests" on page 217.

   The patron's hold requests are listed under **Polaris requests**.

2. Select the requests you want to group.

3. Click  or press **CTRL+G**.

   A letter is assigned to the new group. It appears in the Group column for each of the grouped requests. Use the horizontal scroll bar to see this column.

   Example:
   The letter **A** is assigned to the patron's first group. If the patron already has a group A, the letter **B** is assigned to the new group.

4. If you want to add one or more hold requests to an existing group, follow these steps:

   a) Select any one request in the existing group.

   b) Select the requests you want to add to the group.

   c) Click .

Ungroup a patron's hold requests

A group is automatically deleted if all but one request is ungrouped. This procedure does not delete the requests; it simply removes them from their groups. Follow these steps to remove one, multiple, or all requests from a group.

1. Open the patron's record in the Patron Status workform - Requests view. See "Display a patron's hold requests" on page 217.

2. Select the requests you want to remove from the group in the Polaris requests list.

3. Click  or press **CTRL+R**.

   The group letter no longer appears in the Group column for the requests you selected. Use the horizontal scroll bar to see this column.

Managing the Holds Queue

The holds queue is the prioritized list of Active or Pending requests for a specific title or item. By default, hold requests are arranged from the oldest request at the top to the most recently created request at the bottom. The oldest request is usually filled first. However, you can manually change the order of the requests.

Note:
Certain administration settings for your library may also affect a request's queue position, so that requests are not always filled in strict date and time order. See "Setting Up Holds and ILL Request Processing" in the *Polaris Patron Services Administration Guide 4.1R2*. Libraries may also choose not to display the request queue position in the PAC patron account. See "Setting Up Holds Routing" in the *Polaris Patron Services Administration Guide 4.1R2*.

Rearrange hold requests in the queue

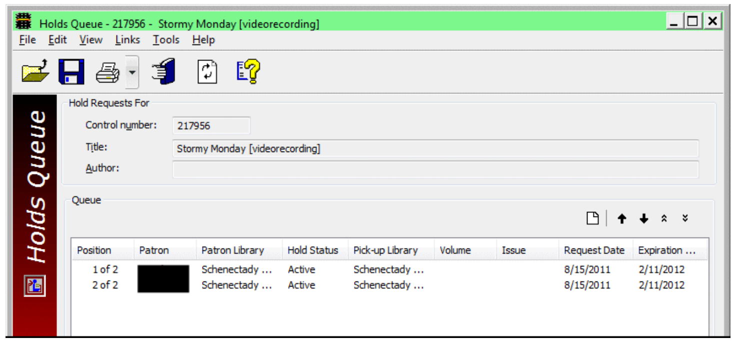
Follow these steps to change the order in which hold requests for a title are filled, by rearranging the requests in the queue.

Note:
You need the Circulation permission **Modify hold queues: Allow** to do this procedure. See "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*.

1. Open the Holds Queue by one of these methods:
   - **Shortcut Bar** - Select **Circulation, Holds Queue** to find the bibliographic or item record. When you double-click the record in the Find Tool results list, the Holds Queue workform for the record is displayed.
   - **Patron Status workform - Requests view** - Right-click the title, and select **Links, Holds Queue** from the context menu.
   - **Hold Request workform** - Select **Links, Holds Queue** from the menu bar.

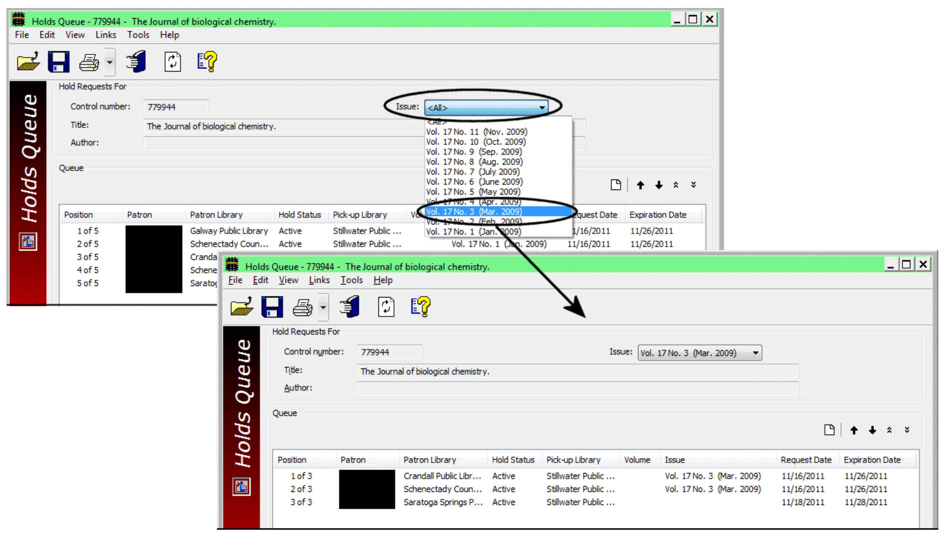
Tip:
To see all the requests for the title, not just the active and pending requests, select **Links, All Hold Requests** from the Holds Queue workform menu bar.

The Holds Queue workform opens. The workform lists the active and pending requests for the title. If your library allows item-level or first-available-copy requests, these are indicated by the item-level icon at the beginning of the request line. Borrow by Mail requests are indicated by the Borrow by Mail icon at the beginning of the request line. Item-level Borrow by Mail requests include an I in the Borrow by Mail icon.



Note:
Other users may be creating requests for a title, or request statuses may be changing. To view the most current request data for a title, select **View**, **Refresh**, click , or press **F5**.

2. To see the queue for a specific volume in a multi-volume set, or a specific serial issue, select the volume or issue from the **Volume** or **Issue** filter list in the workform header area.



3. Select the hold request line item to be moved in the Queue list.

4. Choose one of the following options:
   - To move the request up in the queue one or more positions, click  or press **CTRL+U**. Repeat as needed.
   - To move the request down in the queue one or more positions, click  **CTRL+W**. Repeat as needed.
   - To move the request to the first position in the queue, click  or press **CTRL+T**.
   - To move the request to the last position in the queue, click  or press **CTRL+B**.

The hold request appears in its new position, with the other requests in the Queue list rearranged accordingly.

5. Select **File, Save** to save your changes.

   The status bar indicates that the order of the holds was changed successfully.

Related Information

- **Local preferred** - Patrons may not have their hold requests filled in the exact order of the queue. A pickup library may choose to have requests for its own items filled before requests for other branches' items. See "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Queue position for patron-suspended or reactivated requests** - If your library allows patrons to suspend and reactivate their own hold requests from the PAC, the library can specify whether these requests retain their positions in the holds queue or are placed at the end of the queue. See "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Loan periods for high-demand items** - Your library may choose to automatically shorten an item's loan period if a specified number of hold requests are placed for the title. See "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*. This option allows high-demand titles to circulate more quickly.

Editing Hold Requests

After hold requests have been placed, edit them in the following ways:

- **Editing hold request data** - A patron may ask to change the pickup library for the requested material. See "Edit hold request data" on page 228.
- **Transferring requests** - You can transfer active or inactive hold requests from one bibliographic or item record to another. For example, you may want to transfer a hold request from a bibliographic record with many hold requests to a record with few requests or more copies. See "Transfer a hold request" on page 230.
- **Cancelling/deleting requests** - If a patron no longer wants a requested title, you can cancel or delete the hold request manually. Whether you choose to cancel or delete requests depends on the situation, the request's status, and your library's policy. See "Cancel hold requests" on page 231 and "Delete hold requests" on page 232.
- **Reactivating requests** - You can reactivate hold requests to permit items to fill them. When you reactivate a hold request, the request immediately becomes Active with a new expiration date, and items can be trapped for it. See "Reactivate hold requests" on page 233.
- **Converting requests** - You can manually convert hold requests to interlibrary loan (ILL) requests. The hold requests must have one of the following statuses: Active, Expired, Inactive, Not-supplied. You might decide to convert a hold request if items are not trapping for it. See "Creating Interlibrary Loan Requests" on page 246.

Edit hold request data

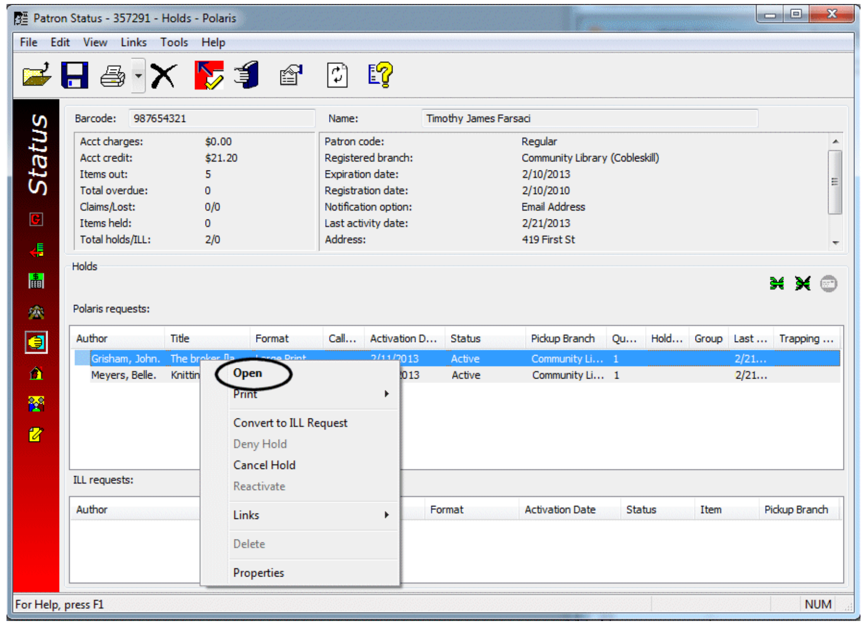
You can edit a hold request with any status for a patron, but the request status determines which information can be edited. For example, you can add or edit notes for all requests, but you can change the expiration date for Active, Inactive, and Pending requests only. You cannot edit the patron or bibliographic information for any hold requests. Follow these steps to edit a hold request.

1. Display the hold request you want to edit from one of the following locations:
    - **Hold Request Find Tool** - See "Find hold requests" on page 219.
    - **Patron Status workform - Requests view** - See "Display a patron's hold requests" on page 217.
    - **Request Manager workform - Hold Requests view** - See "Display hold requests by selected criteria" on page 218.

      Holds Queue workform - Select **Circulation, Holds Queue** to find and display the queue for a specific bibliographic or item record.
    - **Bibliographic or Item Record workform** - See "Display requests linked to a bibliographic or item record" on page 221.

2. Right-click the hold request in the list, and select **Open** from the context menu.

   The illustration shows the Patron Status workform - Requests view.



   The Hold Request workform appears. The specific information fields available on the workform depend on the request's status.

3. Make changes, as needed.

   Note:
   If you change the pick-up library, certain policies regarding the holds request may change.

   You can change the unclaimed date for requests with a status of Held. If the pick-up branch is closed on the new date, the unclaimed date is set to the next day the pick-up branch is open when you save the request. A message informs you of the change.

   Important:
   If you change the unclaimed date for a request with the status of Held, you will need to manually change the pick-up slip. Cross out the old date on the slip and write in the new date.

4. Select **File, Save** to save your changes.

Transfer a hold request

You can transfer Active or Inactive hold requests from one bibliographic or item record to another. For example, you may want to transfer a hold request from a bibliographic record with many hold requests to a record with fewer requests or more copies. A transferred request is a new request. The pick-up branch, activation date, expiration date, and patron data are transferred from the original request, but the original request's history is lost. When the transferred request is saved, the original is deleted, and the transferred request is placed at the end of the holds queue for the title, like any other new request. Follow these steps to transfer a hold request from one bibliographic or item record to another one.

Note:
To transfer requests, you need the permissions **Hold requests: Create** and **Hold requests: Delete** (refer to "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*).

1. Open the hold request you want to transfer in the Hold Request workform. See "Edit hold request data" on page 228.
2. Select **Tools, Transfer** from the menu bar.

   A message indicates that the request history will be lost.
3. Click **Yes** in the message box to continue with the transfer.

   A new Hold Request workform is displayed with the pick-up branch, activation date, expiration date, and patron data from the original request. The Details frame boxes are empty.

Note:
You can also specify the title by typing its information. However, you must unlock the hold request. This is risky, because the request may not be filled if the information does not match the database. Also, you cannot lock a request after unlocking it. To use this method, select **Tools, Unlock Request**. A message indicates that the request may not be filled. Click **Yes** to continue. All the boxes in the Details frame, except **Item barcode**, are available for editing. Type the title's information in the appropriate boxes.

4. To select a title/item, click Title **Find** to do a bibliographic or item record search, right-click the record in the Results list, and choose **Select** from the context menu.

   After you choose **Select**, the applicable boxes in the Details frame are filled in.
5. Add or edit information, as needed.
6. Select **File, Save** to save the transferred request.

   The transferred request is placed at the end of the holds queue for the title. The original request is deleted.

Related Information

When a new bibliographic record replaces an existing record, any holds attached to the old record are transferred to the new record. These requests maintain their position in the queue.

Cancel hold requests

When you cancel a hold request, items can no longer fill the request. However, the request remains in the Polaris database and visible on workforms. For record-keeping purposes, you might choose to cancel rather than delete a request. Also, if a patron decides she wants a title after all, you can easily reactivate the cancelled request (see "Reactivate hold requests" on page 233). You can manually cancel requests that are Active, Inactive, Pending, or Not-supplied. Follow these steps to cancel one or more hold requests.

Tip:
You can also display the hold requests in the Patron Status workform - Holds view or the Holds Queue workform. Right-click the requests in the list, and select **Cancel Hold** from the context menu. In the Hold Request workform, you can select **Tools, Cancel** or click . In a Bibliographic or Item Record workform, select **Links, All Hold Requests**, right-click the request in the Linked Hold Requests dialog box, and select **Cancel** from the context menu.

1. Select **Circulation, Request Manager** from the Polaris Shortcut Bar.

   The Request Manager workform - Hold Requests view appears.

2. Select a library in the **Branch name** box and one of the following options in the **By** box, according to the requests you want to display:
   - **Item** - Displays requests for items that are owned by the selected library
   - **Patron** - Displays requests for patrons who are registered at the selected library
   - **Pickup** - Displays requests to be picked up at the selected library

3. Select a hold request status in the **Status** box.

   You can cancel requests that are active, inactive, or pending.

4. Select the requests.

5. Click above the Requests list or press **CTRL+L**.

   The requests are no longer displayed because their status has changed to cancelled.

Related Information

- **Automatic cancellation** - Hold requests may be cancelled *automatically* in certain circumstances:
  - Your library may automatically cancel an unclaimed request when the held item is checked in. See "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*.
  - An item record is deleted, it is the last item attached to the bibliographic record, and an Active, Inactive, or Pending request is bound to the title. A message indicates that deleting the item record cancels the request. If you continue, Polaris cancels the request.
- **Automatic deletion** - Your library may automatically delete cancelled requests after a specified period. See "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Cancellation by patrons** - Your library may allow patrons to view and cancel their hold requests from the PAC patron account.

Delete hold requests

When you delete a hold request, the request is removed permanently from the Polaris system. You can manually delete requests that are Cancelled, Expired, Inactive, or Not-supplied. Follow these steps to delete one or more hold requests.

Tip:
You can also display the hold requests in the Patron Status workform - Holds view. Right-click the requests in the list, and select **Delete** from the context menu. In the Hold Request workform, you can select **File, Delete** or click . In a Bibliographic or Item Record workform, select **Links, All Hold Requests**, right-click the request in the Linked Hold Requests dialog box, and select **Delete** from the context menu.

1. Select **Circulation, Request Manager** from the Polaris Shortcut Bar.

   The Request Manager workform - Hold Requests view appears.

2. Select a library in the **Branch name** box and one of the following options in the **By** box, according to the requests you want to display:
   - **Item** - Displays requests for items that are owned by the selected library
   - **Patron** - Displays requests for patrons who are registered at the selected library
   - **Pickup** - Displays requests to be picked up at the selected library

3. Select a hold request status in the **Status** box.

   You can delete requests that are Cancelled, Expired, Inactive, or Not-supplied.

4. Select the requests.

5. Click above the Requests list, or press **CTRL+D**.

   A message alerts you that deleting a hold request removes it permanently from the system.

6. Click **Yes** to confirm that you want to delete the requests.

Related Information

Automatic deletion - Hold requests may be deleted *automatically* in certain circumstances:

- Your library may automatically delete an unclaimed request when the held item is checked in. See “Set Holds options: PAC, Item, First Available Copy Requests” in the *Polaris Patron Services Administration Guide 4.1R2*.
- Your library may automatically delete Expired, Cancelled, and Not-supplied requests after a specified period. See “Set Holds options: PAC, Item, First Available Copy Requests” in the *Polaris Patron Services Administration Guide 4.1R2*.
- When a non-holdable item is checked out to a patron who has a title-level hold request that the item would otherwise fill, the hold request (Active or Inactive) is deleted.

Reactivate hold requests

You can reactivate Cancelled, Expired, and Not-supplied hold requests to permit items to fill them. When you reactivate a hold request, the request immediately becomes active with a new expiration date, and items can be trapped for it. The reactivated request's position in the holds queue is determined by a Polaris Administration setting; see “Defining Hold Processing Options” in the *Polaris Patron Services Administration Guide 4.1R2*. You might reactivate a cancelled request if a patron decides she wants a title after all. You might choose to reactivate Expired and Not-supplied requests to provide another opportunity to trap items for the request. Follow these steps to reactivate one or more hold requests.

Note:
A Not-supplied request cannot be made Active if the conditions that made it not supplied have not changed. You can reactivate the request, but as soon as the system determines that it cannot be filled, the status again becomes Not-supplied.

Tip:
You can also display the hold requests on the Patron Status workform - Holds view. Right-click the requests in the list, and select **Reactivate** from the context menu. In the Hold Request workform, select **Tools, Reactivate** or click . In a Bibliographic or Item Record workform, select **Links, All Hold Requests**, right-click the request in the Linked Hold Requests dialog box, and select **Reactivate** from the context menu.

1. Select **Circulation, Request Manager** from the Polaris Shortcut Bar.

   The Request Manager workform - Hold Requests view appears.

2. Select a library in the **Branch name** box and one of the following options in the **By** box, according to the requests you want to display:
   - **Item** - Displays requests for items that are owned by the selected library
   - **Patron** - Displays requests for patrons who are registered at the selected library
   - **Pickup** - Displays requests to be picked up at the selected library

3. Select a hold request status in the **Status** box.

   You can reactivate requests that are Cancelled, Expired, or Not-supplied.

4. Select the requests.

5. Click  above the Requests list, or press **CTRL+A**.

   The list shows requests with the status Cancelled, Expired, or Not-supplied, so the requests you reactivated are no longer displayed. Their status has changed to Active.

Related Information

Patron control of hold requests - Your library may allow patrons to suspend Active or Pending hold requests and place hold requests with activation dates in the future from the PAC. A Polaris Administration setting controls the queue position of these requests when they are re-activated or the activation date is reached. For more information, see “Defining Hold Processing Options” in the *Polaris Patron Services Administration Guide 4.1R2*.

Daily Request Processing

A recommended workflow is to review the status of hold requests once a day, using the Request Manager workform - Hold Requests view. This is important because other libraries may be requesting items from you, and activities may be taking place at other libraries that affect your patrons' requests.

Check the following requests every day:

> **Note:**
> Your library may set up different descriptions for these hold request statuses. See "Edit hold request status descriptions" in the *Polaris Patron Services Administration Guide 4.1R2*.

- **Pending** - Requests from other libraries for items with a status of In at your library. The list of pending requests is also known as Requests-to-Fill. See "Manage pending hold requests (Requests-to-Fill)" on page 234.
- **Cancelled** - Delete or reactivate these requests. See "Manage Cancelled hold requests" on page 238.
- **Not-supplied** - Delete or reactivate these requests, or convert them to interlibrary loan requests. See "Manage Cancelled hold requests" on page 238.

> **Note:**
> You can reactivate a Not-supplied request, but if the reason it was not supplied has not changed, the request becomes Not-supplied again.

- **Unclaimed** - Pull these materials from the holds pickup shelf, and check them in. See "Manage Unclaimed hold requests" on page 240.

Manage pending hold requests (Requests-to-Fill)

Polaris processes requests-to-fill once a day, during overnight processing. You view or print the Requests-To-Fill (RTF) report daily to see what items other branches are requesting from you. For each pending request, you either check in the item to change its status and send it to the pickup branch, or deny the request in Polaris. Your library system determines how many days you have to respond to a request before it is routed to the next library in the sequence and no longer displays in your RTF list.

> **Note:**
> An item filling a request can be trapped at any branch in the routing sequence, at any time. RTF is simply a report to library staff that they have an item with a status of In that can fill a pending request.

Follow these steps to review and process pending hold requests regularly.

1. Select **Circulation, Request Manager** from the Polaris Shortcut Bar.

   The Request Manager workform - Hold Requests view appears.

Note:
When the view opens, the pending requests for your branch are listed. If the view is already open and they are not listed, select your branch in the **Branch name** box, **Item** in the **By** box, and **Pending** in the **Status** box.

2. Print the Requests-To-Fill report. See "Fill hold requests for Requests-To-Fill" on page 235.

   Note:
   You can also print the workform list view. Select the column header by which you wish to sort the list, then select **File, Print, List View**.

3. Fill or deny items for RTF. See "Fill hold requests for Requests-To-Fill" on page 235, and "Deny items for Requests-To-Fill" on page 237.

   Important:
   If you take no action on a pending request, the request is routed automatically to the next library in the RTF sequence after a library-defined number of days.

Related Information

For information on setting up Polaris for holds processing, see "Holds Processing Overview" and "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*.

Fill hold requests for Requests-To-Fill

Pending requests are requests for items with a status of In at your library. The items must be pulled and scanned to fill the requests. Follow these steps to fill hold requests as part of your library's regular process of checking the Requests-To-Fill (RTF) report.

1. Select **Circulation, Request Manager** from the Polaris Shortcut Bar.

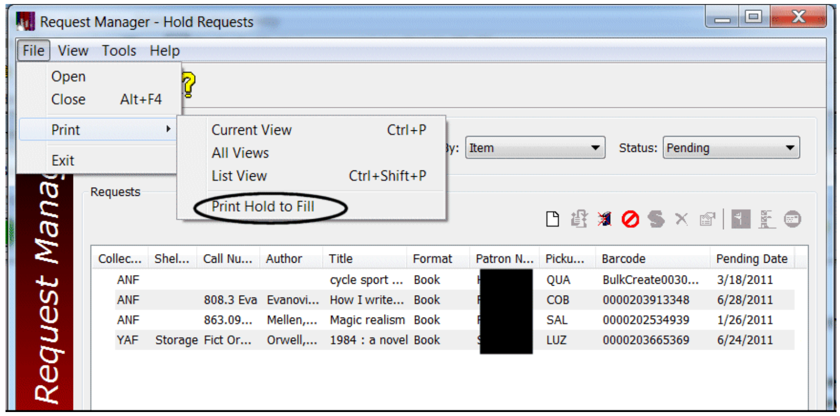
   The Request Manager workform - Hold Requests view appears.

2. Select your branch in the **Branch name** box, **Item** in the **By** box, and **Pending** in the **Status** box.

   The Request-To-Fill list appears on the workform.

3. Select **File, Print Hold to Fill** to print the Requests-To-Fill report.

   Note:
   You can also print the workform list view. Select the column header by which you wish to sort the list, then select **File, Print, List View**.

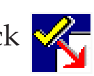


The report is generated and the Report Preview window opens.

4. Click the printer icon.

   The report is printed on the default printer for your workstation. It lists the items at your branch with a status of In that can fill a pending hold request. The report contains the same information as the Requests list in the Request Manager workform, as well as the requesting patron's patron code, registration branch, barcode, and phone number. Requests for specific items (item-level hold requests) are indicated by the text **This item only**.

   Note:
   You can also print the RTF report from the Polaris Reports dialog box. Select **Utilities**, **Reports and Notices** on the Polaris Shortcut Bar. Running the report by this method allows you to sort by specific fields, such as call number and collection. See "Holds Processing Reports" in the *Polaris Basics Guide 4.1R2*.

5. Pull the requested items from the shelves.
6. Check in each item from one of the following locations:
   - **Check In workform - Normal view** - See "Do a normal check-in from the Check In workform" on page 126.
   - **Item record workform** - Select **Tools, Check In** or click .

   A message asks whether you want to transfer the item to the pick-up branch.

7. Click **Yes**.

   The circulation status is Transferred, and the request status is Shipped.

8. Repeat steps 6-7 for each item you are supplying.
9. Ship each item to its pick-up library, where the item will be checked in and held for pickup. See "Fill a hold request at circulation" on page 241.

Related Information

Denying items - See "Deny items for Requests-To-Fill" on page 237.

Deny items for Requests-To-Fill

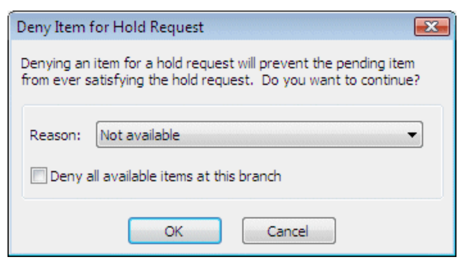
If you cannot or do not want to fill a hold for RTF, you deny the item from filling the request. The request itself remains Active, and after the next RTF process runs, the request is routed to the next library in the sequence. This is part of your library's regular process of checking the Requests-To-Fill (RTF) report. Follow these steps if you cannot or do not want to fill one or more hold requests.

1. From the Request Manager workform - Hold Requests view, print the Requests-To-Fill report. See "Fill hold requests for Requests-To-Fill" on page 235.
2. Display the Requests-To-Fill list on the Hold Requests view by making the following selections:
   - Your branch in the **Branch name** box
   - **Item** in the **By** box
   - **Pending** in the **Status** box
3. Select the items in the Requests list that you want to deny for hold.

   Note:
   If you have the same reason for denying several or all holds, deny these items at the same time. If you have different reasons, deny the items separately.

4. Click  or press **CTRL+R**.

   The Deny Item for Hold Request dialog box appears.



5. Select the reason for not supplying the item or items.
6. Do one of the following actions:
   - To prevent this particular item or items from filling the request, simply click **OK**. In this case, if your branch has other items that could fill the request, the request may appear again on the RTF list during the next RTF cycle.
   - Select (check) **Deny all available items at this branch**, and click **OK**. In this case, the request does not appear again on the RTF list, even if your branch has other items that could fill the request.

   The Hold Requests view is displayed, but the request you denied no longer appears. After the RTF process is run, the request appears on the RTF list of the next library in the holds routing process.

Related Information

- **Ignoring an RTF item** - If you take no action on an item in the Requests list, it is automatically routed to the next branch in the sequence. After a library-specified number of days, if no other library fills the request, the system routes it back to your library.
- **Viewing a Not-supplied reason** - You can view a Not-supplied reason for a patron's hold request on the Hold Request workform - Notes view. Scroll the Request Satisfied By list to the right. The far column is Not Supplied Reason. If a request was denied, an icon appears next to the bibliographic record control number. The icon is red for a request denied by a staff member, and blue for a request denied by the system. The system may deny a request from the PAC if a patron has exceeded the request limit for an item's material type and all the items attached to the bibliographic record are this material type.

1-2-3

Manage Cancelled hold requests

Follow these steps to delete or reactivate Cancelled hold requests.

1. Select **Circulation, Request Manager** from the Polaris Shortcut Bar.

   The Request Manager workform - Hold Requests view appears.

2. Select your branch in the **Branch name** box, **Patron** in the **By** box, and **Cancelled** in the **Status** box.

3. Click to delete the requests or click to reactivate them. See "Delete hold requests" on page 232 and "Reactivate hold requests" on page 233.

   Note:
   Your library may automatically delete cancelled hold requests after a specified period of time. See "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*.

Manage Not-supplied hold requests

Follow these steps to delete or reactivate Not-supplied hold requests for your patrons. You can also convert these requests to interlibrary loan requests.

Note:
A Not-supplied request cannot be made Active if the conditions that made it Not-supplied have not changed. You can reactivate the request, but as soon as the system determines that it cannot be filled, the status again becomes Not-supplied.

1. Select **Circulation, Request Manager** from the Polaris Shortcut Bar.

   The Request Manager workform - Hold Requests view appears.

2. Select your branch in the **Branch name** box, **Patron** in the **By** box, and **Not Supplied** in the **Status** box.

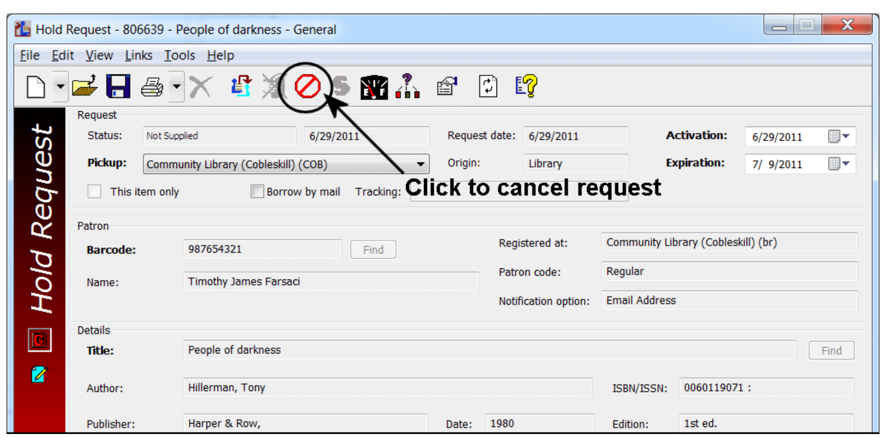
3. Delete, reactivate, or convert the requests:

   - Click to delete the requests. See "Delete hold requests" on page 232.
   - Click to reactivate the requests. See "Reactivate hold requests" on page 233.
   - Click to convert the requests. See "Convert hold requests to ILL requests" on page 247.

Note:
Your library may automatically delete Not-supplied hold requests after a specified period of time. See "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*.

Related Information

Cancel a not-supplied request - You can cancel a Not-supplied request from the Hold Request workform. Click the Cancel icon in the workform toolbar.



Manage Unclaimed hold requests

The item status changes from Held to Unclaimed at 11:59 p.m. on the hold request's unclaimed date if the item is not picked up. The unclaimed date is determined by the **Maximum days held for pickup** setting in Polaris Administration (see "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*); dates closed and hours of operation (days closed) are taken into account in the calculation. Follow these steps to manage Unclaimed hold requests for items that were supposed to be picked up at your branch, but were not picked up.

> **Note:**
> As long as an item's status is still Held, you can *manually* extend the unclaimed date when a patron is unable to pick up the item by the original date. Change the **Unclaimed** date for the item in the Hold Request workform (see "Edit hold request data" on page 228).

1. Select **Circulation, Request Manager** from the Polaris Shortcut Bar.

   The Request Manager workform - Hold Requests view appears.

2. Select your branch in the **Branch name** box, **Pickup** in the **By** box, and **Unclaimed** in the **Status** box, if they are not already selected.

   > **Note:**
   > For a paper copy of this information, select **Utilities**, **Reports and Notices** on the Polaris Shortcut Bar, and print the Unclaimed Checklist report. See "Holds Processing Reports" in the *Polaris Basics Guide 4.1R2*.

3. Pull the unclaimed materials from the holds pickup shelf.

4. Check in each item. See "Do a normal check-in from the Check In workform" on page 126.

   All unclaimed requests are automatically deleted or cancelled when the held items are checked in, depending on your library's policy. See "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*.

Filling Holds at Circulation

If an item that fills a hold request is scanned during circulation, you can choose to hold the item for the requesting patron. If you hold the item, the item is trapped, and the request is filled. The patron has a library-defined number of days to pick up the item before its request status becomes unclaimed.

Note:
You can also fill a request by using the Fill Now function on the Hold Request workform. After you scan the item's barcode, Polaris automatically holds the item. See "Fill a hold request with Fill Now" on page 243.

If you choose not to hold an item for a request, you can either reactivate or cancel the hold request. If you reactivate the request, items can still be trapped to fill it, including the item you just denied for the hold. If you cancel the request, items cannot be trapped to fill it. However, you can manually reactivate a cancelled request at any time (see "Reactivate hold requests" on page 233).

Fill a hold request at circulation

You may have received an item from another library to fill a request, or you may be alerted to the item during other circulation tasks. Follow these steps to fill a hold request at circulation, usually during the check-in process.

Note:
At bulk mode check-in, your library's Polaris Administration settings determine whether the item is automatically held or if you are prompted to hold the item. *At check-out*, another Polaris Administration setting determines whether an item can be trapped to fill a request. See "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*.

1. Check in an item from one of the following locations:
   - Check In workform - Normal view (see page 126)
   - Check In workform - Bulk view (see page 134)
   - Item record workform (select **Tools, Check In**, or click)

   Note:
   This procedure also applies if you are renewing an item (refer to "Renewing Items" on page 107) or checking out an item ("Check out an item" on page 94).

   A message appears.

2. If your branch is not the pick-up library, the message asks if you want to transfer the item to the pick-up library for a hold. Click **Yes**, and ship the item to the library, where it will be checked in and held.

   The circulation status is Transferred, and the request status is shipped.

3. If your branch is the pick-up library, the message asks if you want to hold the item. Click **Yes**.

   If there is a display note in the hold request, a second message shows the note. Click **OK**.

   The following events occur automatically:

   - The circulation status and the request status change to Held.
   - A hold slip prints if hold slip printing has been set up for this workform. See "Setting Up Receipt Printing from Workforms" on page 79.

     Note:
     You can reprint a hold slip for a held item by checking in the held item a second time, keeping the Held status for the item.

   - A charge is applied to the patron's account if that is your library's policy. See "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*.
   - Polaris produces a hold notice to notify the patron that the item is available for pickup. The delivery method for the hold notice is determined by Polaris Administration settings. For procedures to issue hold notices, see "Request Pick-Up, Second Pick-Up, & Cancelled Request Notices" in the *Polaris Patron Services Administration Guide 4.1R2*.

     Note:
     The patron has a library-defined number of days to pick up the item before its request status becomes Unclaimed. However, you can change this date by editing the hold request's **Unclaimed date** box. See "Edit hold request data" on page 228.

Related Information

The following additional holds messages may appear at circulation.

- **The hold request for...needs to be either reactivated or canceled** - To reactivate the request, click **Yes**. To cancel the request, click **No**.
- **This item cannot be checked out, because it is being held** - To override the hold and continue with check-out, click **Yes**, and a message asks if you want to reactivate the hold request. To stop the check-out, click **No**.
- **This item is held for...Continue to hold the item?** - To continue the current hold, click **Yes**. To continue the circulation process, click **No**. If the item can fill another request, a message indicates that this item satisfies a hold request.
- **Outreach services patron** - This note may appear on a holds message if your library uses Polaris outreach services. It indicates that the item fills a hold request for an outreach services patron. See "Outreach Services Processing" on page 274.

Fill a hold request with Fill Now

You might use the Fill Now function if the item with which you want to fill the request is not identical to what has been requested. Also, you might use it for an item that would be restricted from filling the request under normal circumstances. (The function is available for Not-supplied requests, as well as requests with other statuses.) Follow these steps to use Fill Now.

1. Open the hold request you want to fill in the Hold Request workform. See "Edit hold request data" on page 228.

2. Click , press **CTRL+F**, or select **Tools, Fill Now** from the menu bar.

   The Scan/Enter Item Barcode dialog box appears.

3. Scan the item's barcode in the **Item barcode** box.

   The following events occur automatically:

   - The circulation status and the request status change to Held.
   - A charge is applied to the patron's account if that is your library's policy (refer to "Defining Hold Processing Options" in the *Polaris Patron Services Administration Guide 4.1R2*).
   - Polaris produces a hold notice to notify the patron an item is available for pickup. Polaris Administration settings determine the delivery method for the hold notice (see "Managing Notification" in the *Polaris Patron Services Administration Guide 4.1R2*).

     Note:
     The patron has a library-defined number of days to pick up the item before its request status becomes unclaimed. However, you can change this date by editing the hold request's **Unclaimed date** box.

4. If a message asks whether you want to transfer the item to the pickup library, click **Yes**, and ship the item to the library, where it will be checked in and held.

   If you have set up printing for in-transit slips from this workform, the slip is printed automatically. See "Setting Up Receipt Printing from Workforms" on page 79. If you click **No**, the transaction is canceled.

Related Information

The following messages may appear when you fill a request with the Fill Now function. Follow the instructions:

- **The item is designated not-holdable** - To fill the request with the item, click **Yes**. To stop filling the request, click **No**.
- **This item is held for...Continue to hold the item?** - To continue the current hold, click **Yes**. To continue the circulation process, click **No**. If the item can fill another request, a message indicates that this item satisfies a hold request.
- **Transfer this item to *library* for hold?** - To transfer the item, click **Yes**. If you do not want to transfer the item, click **No**.

Holds Processing Reports

Reports related to holds are part of the regular holds processing workflow. They identify a branch's hold requests to fill, requests awaiting pickup, unclaimed requests, titles that have a high volume of holds, expired requests, and other useful information. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Circulation, Holds** in the Polaris Reports dialog box.

- For information on generating reports, see "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*.
- For detailed descriptions of specific Holds reports, see "Holds Processing Reports" in the *Polaris Basics Guide 4.1R2*. The Statistical Summary report lists all hold requests where the workstation branch is the reporting branch, and the requests have had a status of Held with a status date within the date range. See "System Reports" in the *Polaris Basics Guide 4.1R2*.

Working with Interlibrary Loans

Unlike a hold request, which is placed for a local title or item and filled by your library system, an interlibrary loan (ILL) request is filled by routing it to potential lenders outside your system. Depending on your library's policy, interlibrary loan requests may come through the staff client and PAC.

Your library may process ILL requests manually or automatically. Polaris supports automatic interlibrary loan processing through Online Computer Library Center (OCLC), which acts as an interlibrary loan broker to route ILL requests to potential lenders.

Before you can use the interlibrary loan function, your library must set the appropriate parameters in Polaris Administration. See "Setting Up ILL Requests" in the *Polaris Patron Services Administration Guide 4.1R2*. You also need a template for the temporary item records created when the interlibrary loan items arrive. See "Receiving Interlibrary Loans" on page 255.

This unit covers the following topics:

Creating Interlibrary Loan Requests

You create an interlibrary loan request for a patron by converting a hold request to an ILL request. You may convert multiple hold requests at the same time. After an ILL request is created, it has a status of Active or Inactive, according to your library's settings in Polaris Administration. See "Setting Up ILL Requests" in the *Polaris Patron Services Administration Guide 4.1R2*. If your library uses OCLC and the request has an Active status, it has been exported to OCLC and is in the queue. If the request has an Inactive status, you must review it and manually export it to OCLC before it becomes Active. See "Exporting ILL Requests to OCLC" on page 254. The status of an ILL request indicates the stage it has reached in processing:

- **Active** - The request has been exported to OCLC and placed in the queue. If a requesting library chooses not to mediate (review) ILL requests, the requests are automatically Active when they are created. The PAC patron account displays the date when the request became Active.
- **Cancelled** - A Cancelled ILL request remains in the database and visible on Polaris workforms. The PAC patron account displays the date on which the request was cancelled. Cancelled requests can be deleted manually, at any time.
- **Inactive** - An Inactive ILL request has not been placed in the queue. First, the request must be reviewed and manually exported to OCLC by staff at the requesting library. If a requesting library chooses to mediate (review) ILL requests, the requests are Inactive when they are created. The PAC patron account displays **Inactive since [date]**.
- **Received** - The ILL item arrived at the requesting library, and staff applied the Polaris receive function to the ILL request. When the request becomes Received, and temporary bibliographic and item records have been created, the item can be checked out to the patron. The request retains a Received status before and after the item is checked out. In the staff client, an ILL item with a Received status also displays the item's circulation status; for example, Received-Transferred or Received-Held. In the PAC patron account, only the ILL status (**Received**) is displayed.
- **Returned** - The ILL item was returned by the patron and checked in. Staff applied the Polaris return function to the ILL request. When the request becomes Returned, the item can be shipped back to the lending library. The request retains a Returned status before and after the item is shipped. The temporary bibliographic and item records are deleted when the request is deleted from Polaris. The Returned status is not displayed in the PAC patron account.

Convert hold requests to ILL requests

To convert a hold request to an ILL request, the hold request must have one of the following statuses: Active, Expired, Inactive, or Not-supplied. Follow these steps to convert hold requests to interlibrary loan requests.

1. If the hold requests do not exist, create them. See "Placing Hold Requests" on page 207.
2. Select **Circulation, Request Manager** from the Polaris Shortcut Bar.

   The Request Manager workform - Hold Requests view appears.

Tip:
Other methods: From the Hold Request workform, select **Tools**, **Convert to ILL Request**.You can also select hold requests for a specific patron in the Polaris Requests list on the Patron Status workform - Requests view. Then right-click and select **Convert to ILL Request** from the context menu.

3. Select the appropriate options in the **Branch name**, **By**, and **Status** boxes. See "Display hold requests by selected criteria" on page 218.
4. Select the line items in the Requests list, and click above the list or press **CTRL+I**.

   The selected hold requests are deleted. A new ILL request replaces each hold request. The ILL requests may have an Active or an Inactive status, depending on your library's policy. See "Setting Up ILL Requests" in the *Polaris Patron Services Administration Guide 4.1R2*.

   Note:
   Borrow by Mail hold requests can be converted to ILL requests, but Borrow by Mail functionality does not apply to the new ILL request. For more information about Borrow by Mail, see "Borrow By Mail Circulation" on page 260.

   If the patron has exceeded the limit for ILL requests, the following message appears: **Patron is limited to** *number* **ILL requests**. Click **Yes** to continue creating the ILL request. Click **No** to stop the process.

5. To check the status of the ILL requests, see "Display ILL requests in the Requests Manager" on page 249.
6. If the ILL requests are inactive, do these steps:

   a) Review each request and make any changes. See "Edit an ILL request" on page 251.

   b) Export the appropriate requests to OCLC. See "Export ILL requests to OCLC" on page 254.

   Note:
   You can use **Export** to change the request status to Active even if you do not use OCLC.

Find ILL requests

Follow these steps to find any ILL requests in your Polaris system using the Polaris Find Tool.

1. Select **Circulation, ILL Requests** from the Polaris Shortcut Bar, or click .

   The General tabbed page of the Find Tool appears. **ILL Requests** is selected in the **Object** box.

Tip:
For fast navigation, press the **TAB** key to move among the **Object**, **Search by**, **Type**, **For**, **Limit by**, and **Values** boxes. Type the first letter of the search option in the **Object**, **Search by**, **Type,** and **Limit by** boxes.

2. Select the criterion to search by in the **Search by** box.

   Note:
   If you often search by the same criteria but they are not the default settings, you can save your own settings by selecting **Options, Save as User Default** from the Find Tool menu bar. See "Finding Polaris Records" in the *Polaris Basics Guide 4.1R2*.

3. Select the type of search in the **Type** box.
4. If you want your search results to be sorted, select the **Sort by** check box and select a value.
5. Type a search string in the **For** box.

   Note:
   If you are searching by ISSN, include a dash in your search string if the ISSN is stored with a dash. Or use a wildcard character (*) before the dash and eliminate the rest of the ISSN.

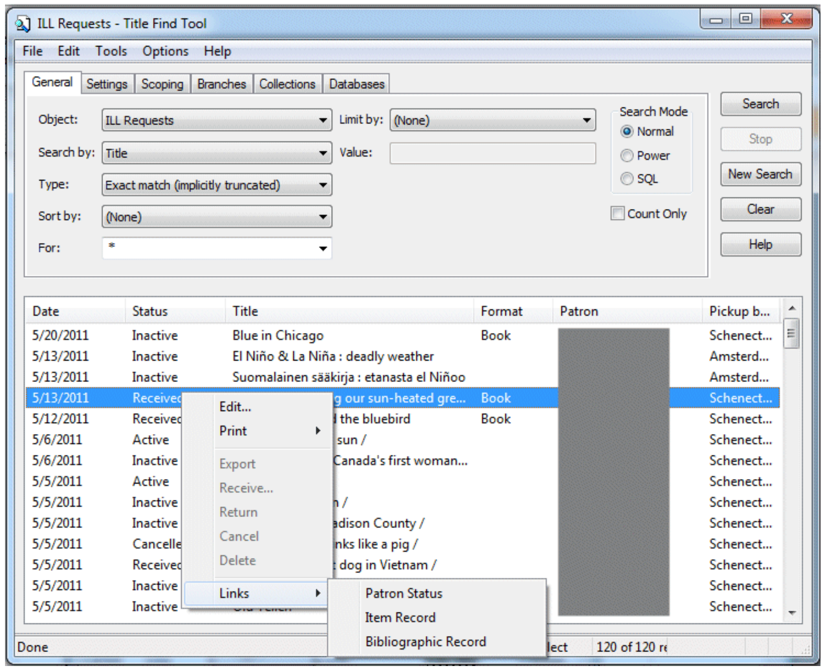
Tip:
If you limit the search by ILL request status (Received or All), the results list includes a column that displays the related item status, such as In, Held, or Shipped.

6. If you want to focus the search, select a limiter in the **Limit by** box, and set a value for the limiter in the **Value** box.
7. Click **Search** to begin the search, or press **ENTER**.

   Your results appear in the results list at the bottom of the Find Tool window. To load all the results in a large results list, press **CTRL+SHIFT+A**.

   Note:
   If you searched in **Normal** mode by **Need-by date**, this date appears in the Date column of the search results list. All other ILL request searches display the *request* date in the Date column.

8. To work with an item in the results list, do one of the following actions:
   - Double-click a line item to open the ILL request.
   - Right-click an item in the results list to work with the request without opening it. The context menu displays the available options. Among other options, you can link to associated patron, bibliographic, or item records.



Display ILL requests in the Requests Manager

You view all the interlibrary loan requests in your Polaris system by selecting criteria on the Request Manager workform - ILL Requests view. The library in the **Branch name** box is associated with the selection (item, patron, or pickup library) in the **By** box. In addition, you must select a request status.

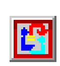
> **Example:**
> To display all cancelled ILL requests where West Side Library is the patron's registered branch, select the following criteria: **West Side Library** (**Branch name** box), **Patron** (**By** box), and **Cancelled** (**Status** box).

Follow these steps to display the interlibrary loan requests in the system.

> **Note:**
> You can also view ILL requests for a specific patron in the ILL requests list on the Patron Status workform - Requests view.

1. Select **Circulation, Request Manager** from the Polaris Shortcut Bar.

   The Request Manager workform - Hold Requests view appears.

2. Select **View, ILL Requests**, or click .

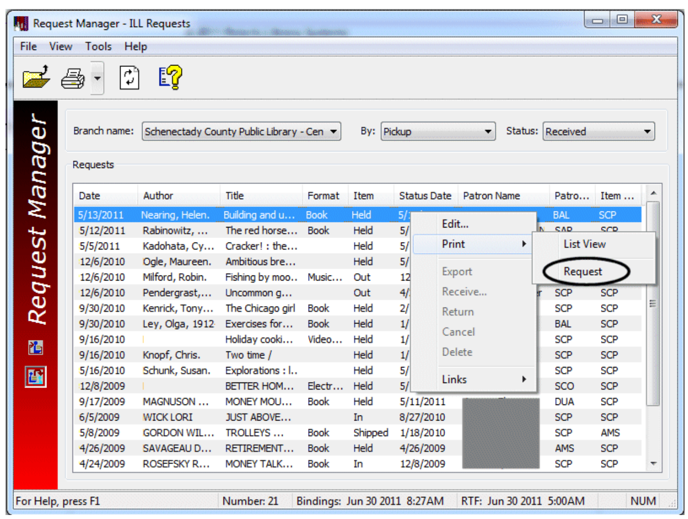
   The ILL Requests view appears.

Tip:
You can open the Polaris Find Tool from the Request Manager workform to search for any ILL request. Select **File, Open** on the Request Manager menu bar.

3. Select a library in the **Branch name** box and one of the following options in the **By** box, according to the requests you want to display:
   - **Item** - Displays requests for items that are owned by the selected library (available only for Received and Returned requests)
   - **Patron** - Displays requests for patrons who are registered at the selected library
   - **Pickup** - Displays requests to be picked up at the selected library
4. Select an ILL request status in the **Status** box. For status descriptions, see "Creating Interlibrary Loan Requests" on page 246.

   The line items that appear in the Requests list depend on your selections in the **Branch name**, **By**, and **Status** boxes.
5. To open the request, right-click the line item, and select **Edit...** from the context menu. See "Edit an ILL request" on page 251.
6. To print the request, follow these steps:

a) Right-click the line item, and select **Print, Request** from the context menu.



The print file is generated and the Report Preview window opens.

b) Click the printer icon.

The request is printed on the default printer for your workstation.

1-2-3

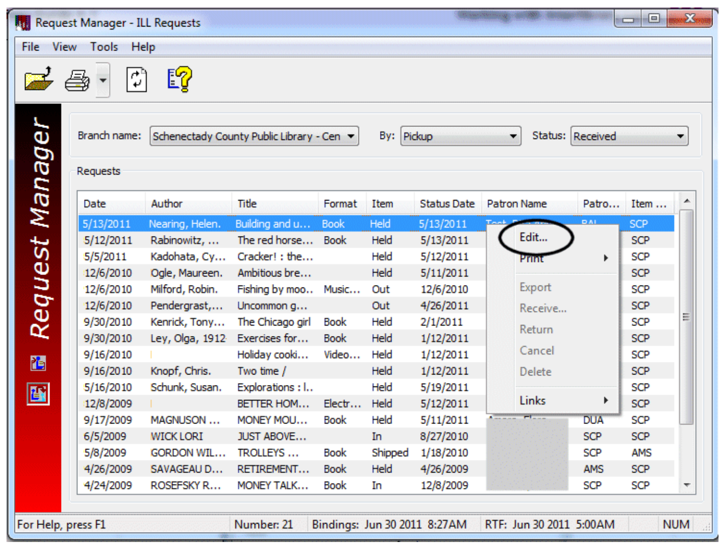
Edit an ILL request

You may want to make changes to an interlibrary loan request. For example, a patron may ask to pick up the requested item at another branch, or you may want to add a note to the request. The status of the request determines which fields can be edited. Follow these steps to edit an interlibrary loan request.

1. Display the ILL request from one of the following locations:
   - **Ill Request Find Tool** - See "Find ILL requests" on page 248.
   - **Request Manager workform - ILL Requests view** - See "Display ILL requests in the Requests Manager" on page 249.

   Note:
   You can also view ILL requests for a specific patron in the ILL requests list on the Patron Status workform - Requests view.

2. Right-click the ILL request, and select **Edit** from the context menu.



   The ILL Request dialog box appears.

3. Click one or more of the following tabs to display the information you want to change:
   - Click the **General** tab to display request status, patron, and delivery information.
   - Click the **Request** tab to display bibliographic information.
   - Click the **Notes** tab to display staff notes.

4. Edit the boxes for the information you want to change, and click **OK** to submit your changes.

   The ILL Requests view appears.

Cancel interlibrary loan requests

You can cancel Active and Inactive interlibrary loan requests. For example, if a patron decides that she no longer wants an item, you might cancel the Active request. If you cancel the request instead of deleting it, the request remains in your database, and is still displayed on the Request Manager workform and the Patron Status workform - Requests view. (If the cancelled request is not needed, simply delete it. See "Delete interlibrary loan requests" on page 252.) Follow these steps to cancel one or more interlibrary loan requests.

> **Important:**
> If you cancel a request after it goes to OCLC but before it is filled by a lending library, you must notify OCLC that you no longer want the item.

1. Display the ILL requests you want to cancel on the Request Manager workform - ILL Requests view. See "Display ILL requests in the Requests Manager" on page 249.

   > **Note:**
   > You can also view ILL requests for a specific patron in the ILL requests list on the Patron Status workform - Requests view.

2. Select the ILL request line items to be cancelled.
3. Right-click and select **Cancel** from the context menu.

   The ILL requests have a Cancelled status and remain in the database.

Delete interlibrary loan requests

You can delete Inactive, Cancelled, or Returned ILL requests at any time, as long as the item status is In. When a request is deleted, the request, as well as the attached temporary ILL bibliographic record and item record (for returned requests), is removed from the database. Follow these steps to delete one or more interlibrary loan requests.

> **Important:**
> If you delete a request after it goes to OCLC but before it is filled by a lending library, you must notify OCLC that you no longer want the item.

1. Display the ILL requests you want to delete on the Request Manager workform - ILL Requests view. See "Display ILL requests in the Requests Manager" on page 249.

   > **Note:**
   > You can also view ILL requests for a specific patron in the ILL requests list on the Patron Status workform - Requests view.

2. Select the ILL request line items to be deleted.

3. Right-click and select **Delete** from the context menu.

   The ILL requests and any associated temporary bibliographic and item records are deleted from the database.

   Note:
   Polaris Administration settings control whether the bibliographic and item records are immediately purged from the database. See "Bibliographic and Item Records for ILL Items" in the *Polaris Patron Services Administration Guide 4.1R2*.

Related Information

ILL bibliographic and item records - See "Receiving Interlibrary Loans" on page 255.

Exporting ILL Requests to OCLC

If your library uses OCLC's ILL Direct Request Service, the library can choose whether to have Polaris export interlibrary loan requests automatically upon their creation. If your library has chosen to mediate ILL requests instead, you must review each inactive ILL request, make any necessary changes to it, and manually export it to OCLC. You can export multiple requests at the same time. Once exported, the requests become Active.

Export ILL requests to OCLC

Follow these steps to export interlibrary loan requests to OCLC.

> **Note:**
> Use **Export** to change the request status to Active even if you do not use OCLC.

1. Display the *inactive* ILL requests you want to export on the Request Manager workform - ILL Requests view (see "Display ILL requests in the Requests Manager" on page 249).

    > **Note:**
    > You can also view ILL requests for a specific patron in the ILL requests list on the Patron Status workform - Holds view.

2. Select the ILL request line items to be exported.
3. Right-click and select **Export** from the context menu.

    The exported ILL requests become Active requests, and they are forwarded to OCLC if your library uses the OCLC ILL service.

Receiving Interlibrary Loans

When an item that fills an Active interlibrary loan request arrives at your library, you receive the item in Polaris using a special ILL item template. When you receive the item, you create temporary bibliographic and item records from the template to track the item in Polaris. Later, these temporary records are automatically deleted when you delete the ILL request.

Note:
Polaris Administration settings control whether the bibliographic and item records are immediately purged from the database. See "Bibliographic and Item Records for ILL Items" in the *Polaris Patron Services Administration Guide 4.1R2*

After the request status is received and the bibliographic and item records have been created, you can check out the item to the patron. Your library controls circulation as it would for any item, such as by adjusting the loan limit and fines. If the item becomes overdue, it is processed like any other overdue item, and the patron is notified.

Create ILL item templates

Follow these steps to create the template for interlibrary loan items.

Important:
Each branch that receive ILL items needs an ILL item template as described here. You need to do this procedure only once for each branch.

1. Select **File, New** from the Polaris Shortcut Bar to display the New dialog box.
2. Select **Item Template** from the Objects list, and click **OK**.

   The Item Template workform - Cataloging view appears.
3. Type **ILL Item** in the **Name** box.

   Important:
   Name the template **ILL Item,** exactly as it appears here.
4. Select *your branch* (not yourself) in the **Template owner** box.
5. In the **Circ status** box (**Identification** section of the workform), select **In**.
6. Make the following settings in the **Circulation parameters** section of the workform:

   a) Select the material code in the **Material type** box.

   Note:
   The interlibrary loan material type is recommended.

   b) Select the loan period code in the **Loan period** box.

   c) Select the fine code in the **Fine code** box.

d) Set the number of times an item can be renewed in the **Renewal limit** box.

> **Note:**
> A renewal limit of **0** (item cannot be renewed) is recommended.

7. Make the following settings in the **Call number** section of the workform:

a) Select the shelving system in the **Scheme** box.

b) (Optional) To track ILL records more easily, type **ILL** in the **Class** box. **ILL** is automatically inserted in the item's call number when the item record is created.

8. If you want to input or change information in other boxes (such as **Assigned** [branch] or **Collection**), type or select the information.

9. Set the branch in the **Home branch** field to the same organization as the **Assigned Branch**.

10. Select (check) **Do not float**.

> **Note:**
> ILL items never float, and any item created from an ILL template will have this indicator checked automatically.

11. Select **File, Save** to save the template.

Once you have created the template, you can receive ILL items. See "Receive an ILL item" on page 256.

Receive an ILL item

When you receive an interlibrary loan item, you create temporary catalog records. Then you can check out the item to the requesting patron. Follow these steps to receive an interlibrary loan item by creating temporary bibliographic and item records.

> **Important:**
> Before you use the interlibrary loan function for the first time, create the ILL Item template. See "Create ILL item templates" on page 255.

> **Note:**
> ILL item records cannot be changed via bulk change.

1. Display the Active ILL request you want to receive on the Request Manager workform - ILL Requests view. See "Display ILL requests in the Requests Manager" on page 249.

> **Note:**
> You can also view ILL requests for a specific patron in the ILL requests list on the Patron Status workform - Requests view.

2. Right-click the ILL request to be received, and select **Receive** from the context menu. You must receive each ILL item individually.

The Brief Item Entry dialog box appears.

3. Complete these steps to fill in the Brief Item Entry dialog box:

a) Type or scan an item barcode in the **Barcode** box.

Tip:
To facilitate searching, you may want to place identifying information such as **ILL** in the **Call number** box.

b) If you want to add a blocking note to the item, type the note in the **Free text block** box.

c) Review the default settings in the remaining boxes and change them, if necessary.

d) Click **OK** to submit your settings.

Temporary bibliographic and item records are created. A message indicates that the item was created, and the item status is Held.

> **Important:**
> If your branch is not the pick-up branch, the item status is In-transit. You must ship the item to the pick-up branch.

4. Click **OK** to acknowledge the message.

The following events occur automatically:

- The ILL request status changes to Received.
- A hold notice is generated for the patron.
- An ILL slip is printed.
- An in-transit slip is printed if your branch is not the pick-up branch.

> **Important:**
> When you first install Polaris, you need to set up Polaris to print receipts and slips. See "Setting Up Receipt Printing from Workforms" on page 79.

5. When the patron arrives to pick up the item, check out the item. See "Check out an item" on page 94.

Returning Interlibrary Loans

When a patron returns an interlibrary loan item to your library, you check in the item, change the ILL request status to Returned, and ship the item back to the lending library.

Return ILL items

Follow these steps to check in and return interlibrary loan items to their lending libraries.

1. Check in the interlibrary loan items. See “Do a normal check-in from the Check In workform” on page 126. The item status changes to In.
2. Display the *received* ILL requests for items to be returned on the Request Manager workform - ILL Requests view. See “Display ILL requests in the Requests Manager” on page 249.
3. Select the ILL request line items for the items to be returned.
4. Right-click and select **Return** from the context menu.

   The ILL requests have a Returned status.
5. Ship the ILL items to the lending libraries.
6. Delete the request from Polaris when you know that the item has been received by the lending library. See “Delete interlibrary loan requests” on page 252. When you delete the returned request, the temporary bibliographic and item records are also deleted.

   Note:
   Polaris Administration settings control whether the bibliographic and item records are immediately purged from the database. See "Bibliographic and Item Records for ILL Items” in the *Polaris Patron Services Administration Guide 4.1R2*

Tip:
You can also view ILL requests for a specific patron in the ILL requests list on the Patron Status workform - Requests view.

Interlibrary Loan Reports

Interlibrary loan reports help you notify patrons when their ILL items have arrived, and track ILL statistics. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Circulation** in the Polaris Reports dialog box.

- For information on generating reports, see "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*.
- For detailed descriptions of specific ILL reports, see "Interlibrary Loan Reports" in the *Polaris Basics Guide 4.1R2*.

Borrow By Mail Circulation

With Polaris Borrow by Mail, you can request library materials for patrons and have the requested materials delivered by mail. A patron can also select the Borrow by Mail feature when placing a request from the PAC if the patron's branch enables this option. Libraries can restrict Borrow by Mail options by patron code, establish a fee for the service, and allow exceptions to the fee for some patrons, such as homebound (Outreach Services) patrons.

Your library system may process Borrow by Mail items in a central location or during normal circulation procedures. In central processing, one or more branches are designated as Borrow by Mail processing centers in Polaris Administration. (A processing center may also be a separate workstation set up as a "branch" in Polaris Administration.) When a Borrow by Mail request is placed, the pick-up location is automatically set to the designated processing center, and the item is routed to this location by normal holds routing procedures. Alternatively, your branch may handle both normal and Borrow by Mail requests by establishing itself as a processing location. In this case, a message alerts you to a Borrow by Mail request when the item is trapped at circulation.

After Borrow by Mail items are trapped and checked out to the requesting patron, each item is packaged with an accompanying letter, mailing label, and return address label. They are then shipped to the patron, and a tracking number can be entered in the Hold Request workform.

The default values and available options for Borrow by Mail are set in Polaris Administration. See "Setting Up Borrow by Mail Circulation" in the *Polaris Patron Services Administration Guide 4.1R2*.

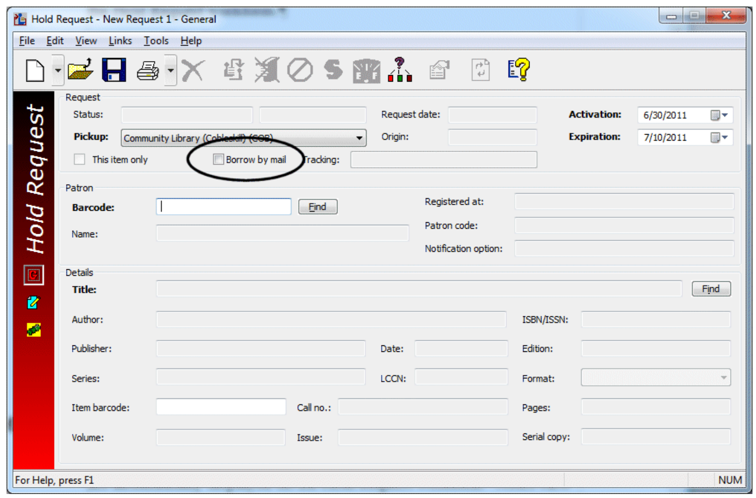
Note:
If your system does not include the Polaris Borrow by Mail license, the features described in this unit are not available.

This unit covers the following topics:

Placing Borrow by Mail Requests

You place a Borrow by Mail request for a patron much like any other hold request (see “Placing Hold Requests” on page 207), but you indicate that a request is for Borrow by Mail by selecting the **Borrow by Mail** check box on the Hold Request workform.

Note:
The Borrow by Mail option is not available for interlibrary loan (ILL) requests.

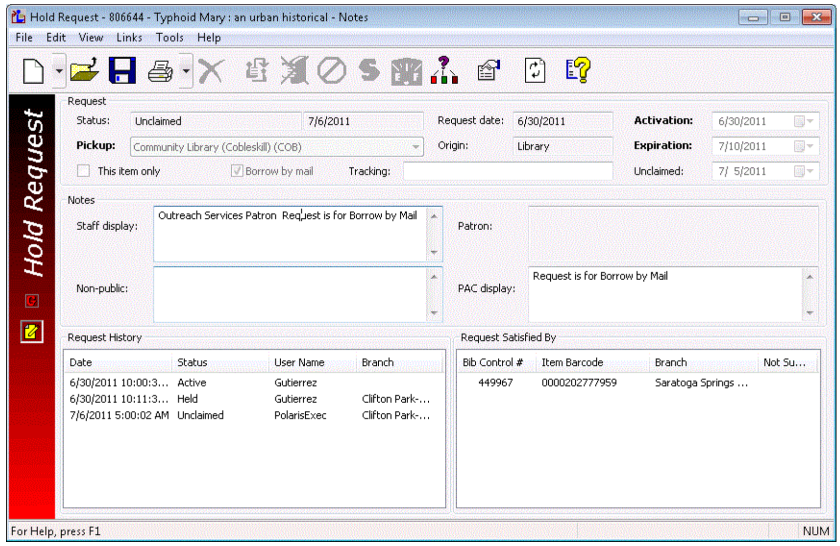


Display Notes for Borrow by Mail Requests

The library may set up default notes for Borrow by Mail requests. If so, they are automatically displayed on the Hold Request workform - Notes view when you save a Borrow by Mail request. If the hold request includes a note, the Notes view icon on the Hold Request workform is yellow .

- **Staff display note** - If your library handles Borrow by Mail requests without sending items to a central processing center, the Staff display note appears when the item is trapped at check-in, alerting you that the item needs to be mailed.
- **PAC display note** - This note is available to patrons in the PAC patron account - Requests page, and indicates that an item is a Borrow by Mail request.

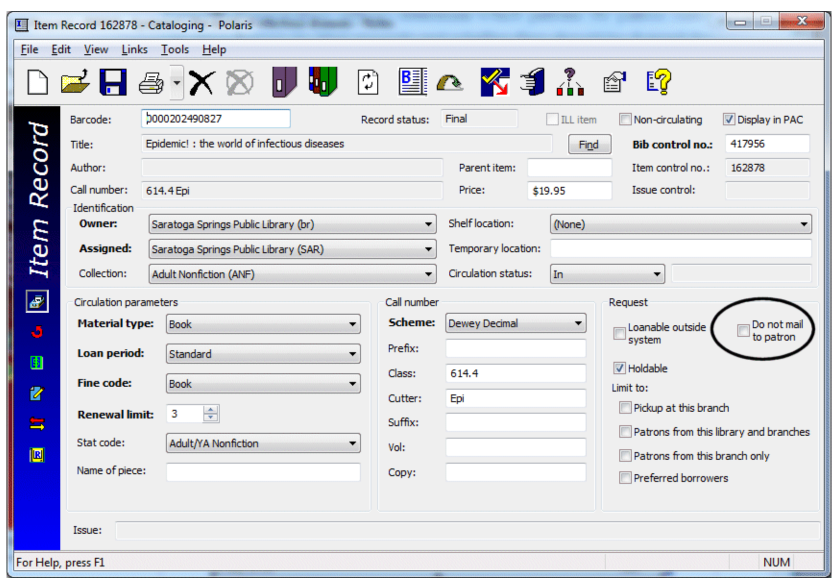
Note:
If you have the Circulation permission **Hold requests: Modify PAC display note,** you can add or modify the PAC display note on the Hold Request workform - Notes view.



Borrow by Mail Limits

Polaris Administration settings determine which patrons (by patron code) can place Borrow by Mail requests and whether they should be charged for the service. The library may also decide that certain item material types should not fill Borrow by Mail requests. See "Setting Up Borrow by Mail Circulation" in the *Polaris Patron Services Administration Guide 4.1R2*.

You can prevent a specific item from filling a Borrow by Mail request by checking the setting **Do not mail** on the Item Record workform - Cataloging view.



Place a Borrow by Mail request

Placing a Borrow by Mail request is similar to placing a normal hold request, but you specify that the request is specifically intended for Borrow by Mail. Follow these steps to place a Borrow by Mail request for a patron.

1. Open the Hold Request workform.

   You can select **File, New** from the Shortcut Bar, then select **Hold Request** from the New dialog box, and click **OK**. For other methods of opening the workform, see "Place single or consecutive hold requests" on page 208.

2. Select (check) **Borrow by mail**.

   By default, the **Pickup** organization is automatically set to the processing location for your workstation's log-on branch. If more than one processing center is available in your system, these are listed as pickup location choices.

   Note:
   An optional tracking number can be entered in the **Tracking** box when Borrow by Mail items are processed for mailing. See "Bulk-Processing Borrow by Mail Items" on page 265.

3. In the **Activation** box, select the date when the hold request should be activated.

   The activation date determines when items trap to fill the request.

4. In the **Expiration** box, select the date after which the requested item is not needed.

5. To input or change the requesting patron, use one of the following methods:
   - Scan or type the patron's barcode in the **Barcode** box.
   - Click Patron **Find** to do a patron record search, right-click the record in the Results list, and choose **Select** from the context menu.

     The **Name**, **Barcode**, **Code**, and **Registered at** boxes are filled in.

6. To select a title for the hold request, click Title **Find** to do a bibliographic or item record search, right-click the record in the results list, and choose **Select** from the context menu.

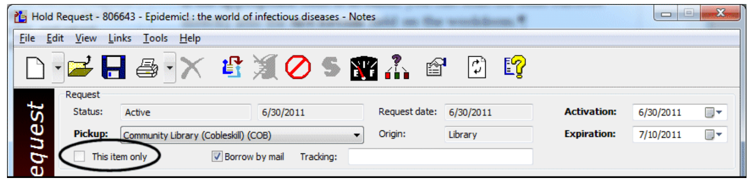
   Note:
   If you select a bibliographic-level serial title or a title with multiple parts and your library allows first available copy requests, an appropriate message appears. If the bibliographic record includes issue designations, you can opt to select a specific issue. If there are no issue designations, you can opt to select a specific item. If the bibliographic record is not a serial, but it has volume data, you can opt to select a specific volume.

   After you choose **Select**, the applicable boxes in the Details frame are filled in. If the appropriate item is at hand, you can scan the item barcode directly into the **Item barcode** field on the workform.

7. Select **File, Save** to save the request.

Tip:
To preview a bibliographic record and the items linked to it before you select it for the hold request, right-click the record in the Find Tool results list, and select **Preview** from the context menu.

The **Status** (**Active**) and **Request date** boxes are filled in. For item requests, **This item only** is checked.



On the Notes view, the **Request Satisfied By** list displays the items that can fill the hold request. Your library may also set default Borrow by Mail display notes that appear on the Notes view when you save the request. See "Display Notes for Borrow by Mail Requests" on page 261 for details.

> **Important:**
> If you are placing consecutive requests, do not close the workform.

8. If you want to place another request, choose one of the following options:
   - To request the same title for a different patron, select **File, New, Patron**, or press **CTRL+G**.

     A new Hold Request workform appears with the same information in the Details frame boxes. The Patron frame boxes are blank.
   - To request a different title for the same patron, select **File, New, Title**, or press **CTRL+H**.

     The saved request closes. A new Hold Request workform appears with the same information in the Patron frame boxes. The Details frame boxes are blank.
   - To request a different title for a different patron, select **File, New, Blank**, or press **CTRL+N**.

     A new blank Hold Request workform appears.

Related Information

- **Polaris Administration settings** - Libraries specify processing centers, restrict Borrow by Mail options by patron code, establish a fee for the service, and allow exceptions to the fee for some patrons, such as homebound (Outreach Services) patrons. See "Setting Up Borrow by Mail Circulation" in the *Polaris Patron Services Administration Guide 4.1R2* for more information about these and other Borrow by Mail settings.
- **Placing Borrow by Mail requests from PAC** - For more information about settings for Borrow by Mail requests from PAC. See "Setting Up Borrow by Mail Circulation" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Processing traditional hold requests** - See "Working with Hold Requests" on page 206.

Bulk-Processing Borrow by Mail Items

If your library uses a central processing center to handle Borrow by Mail items, when an item that fills a Borrow by Mail request is trapped at circulation, it is shipped to the processing center, just as a trapped item that fills a traditional hold request is shipped to the pick-up library. A staff member then processes the items, prints the appropriate mailing materials, and ships them to patrons.

1-2-3

Process Borrow by Mail items in bulk

Follow these steps to process Borrow by Mail items at the processing center.

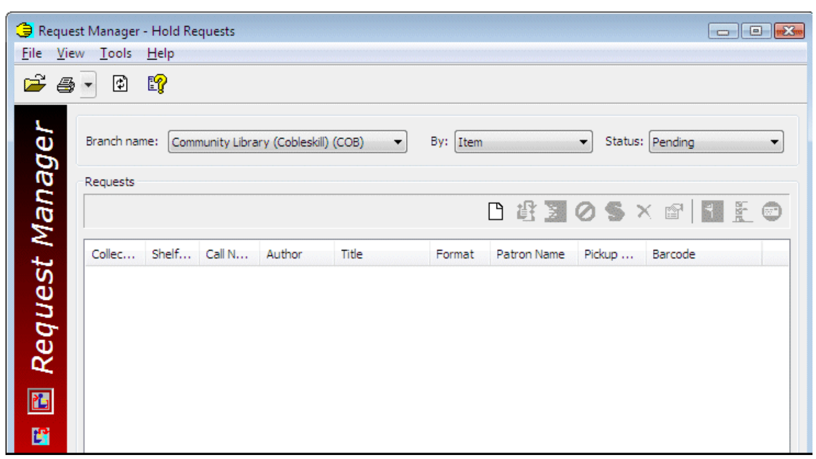
1. When the items arrive at the processing center, check them in (see "Do a normal check-in from the Check In workform" on page 126).

   As you check in each item, a message indicates that the item satisfies a hold. Indicate that you want to hold the item.

   The item status changes to Held.

2. Select **Circulation, Request Manager** from the Polaris Shortcut Bar.

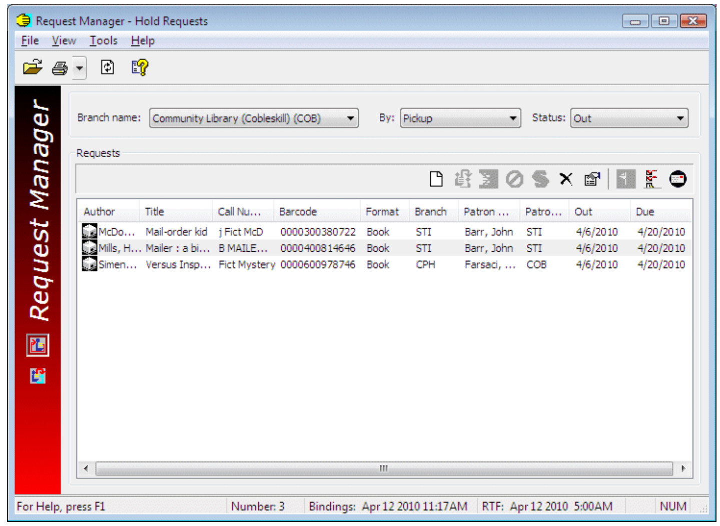
   The Request Manager workform - Hold Requests view appears.



3. Select the processing center in the **Branch name** box, and select **Pickup** in the **By** box.

4. Select **Held** in the **Status** box.

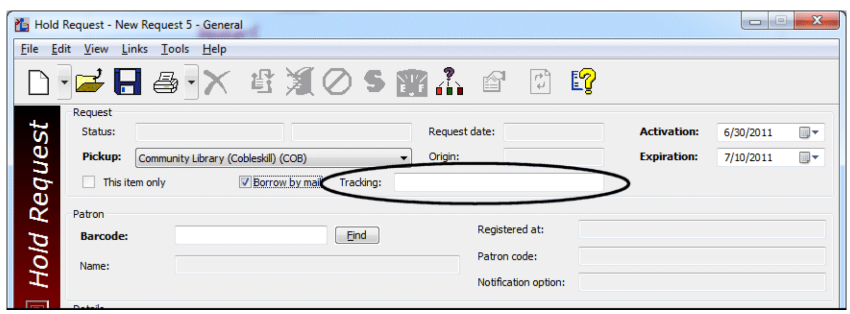
   In the list of Held items, Borrow by Mail requests are marked by a package icon. Item-level Borrow by Mail requests are marked by the package icon with the letter I.



5. To print a checklist of the items to be mailed, select the Borrow by Mail items and click  above the Requests list.

Note:
The checklist is available for Shipped, Held, and Out requests.

If your postal meter generates package tracking numbers, you can note them or stick them on the checklist. Later, you can enter the tracking numbers in the **Tracking** field on the appropriate Hold Request workforms.



6. Check out the Borrow by Mail items to the requesting patrons:

   a) Select the items.

   b) Click [icon] above the Requests list, or right-click and select **Bulk Check Out** on the context menu.

   If an extended loan period has been set for Borrow by Mail items, the due date is calculated with the extended loan period. If a fee has been set for Borrow by Mail processing, the appropriate fee is charged to the respective patron accounts. The system uses the processing center's settings for the loan period and fee. When the items are checked out, the request status changes to Out and they can be listed in the Request Manager by the Out status.

   Notes:

   Blocks for held items do not affect bulk checkout. If an item cannot be checked out during bulk checkout due to other blocks on the patron account, your library may automatically send a failure notice to the patron. See "Setting Up Borrow by Mail Circulation" in the *Polaris Patron Services Administration Guide 4.1R2*.

   You can also bulk check out Borrow-by-Mail items with a status of Shipped (their status when they arrive at the processing center) without changing the status to Held first. This workflow may affect later statistical reporting for holds.

   If there are multiple processing centers in your system and a Borrow by Mail request's pick-up branch differs from your workstation branch, a message appears and the item cannot be checked out.

7. To print the mailers, select the Borrow by Mail items and click [icon] above the Requests list.

   The printed mailer set for each item includes a cover letter, a mailing label, and a return label. The cover letter lists the Borrow by Mail fee, if any, the item data, and instructions for returning the item.

   Note:
   Mailer printing is available for requests with the status Out from the Request Manager and from the Patron Status workform - Requests view.

8. Package the items with their mailers and apply the postage.

   If your shipping equipment generates tracking numbers, note them on or attach them to the checklist you printed from the Request Manager.

9. If your system uses tracking numbers, follow these steps to record them in the appropriate Hold Request workform.

   a) In the Request Manager workform, set the branch to the processing center, the **By** field to **Pickup**, and the status to **Out**.

   b) Right-click each Borrow by Mail request and select **Open** from the context menu.

      The Hold Request workform opens.

   c) Enter the tracking number (up to 60 characters) in the **Tracking** field on the Hold Request workform.

   d) Save the hold request.

Related Information

- **Checking in returned items** - When patrons send back Borrow by Mail items, they are checked in using normal circulation procedures. See "Check-In" on page 122.
- **Polaris Administration settings** - Libraries specify processing centers, restrict Borrow by Mail options by patron code, establish a fee for the service, and allow exceptions to the fee for some patrons, such as homebound (Outreach Services) patrons. See "Setting Up Borrow by Mail Circulation" in the *Polaris Patron Services Administration Guide 4.1R2* for more information about these and other Borrow by Mail settings.

Processing Individual Borrow by Mail Items

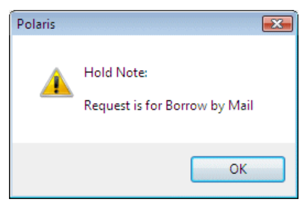
If your library acts as its own processing center for Borrow by Mail items, when an item is trapped for a Borrow by Mail request at check in, you can process the Borrow by Mail item on the spot, along with other requests.

Process individual Borrow by Mail items

Follow these steps to process an individual Borrow by Mail item when the item is trapped at check in.

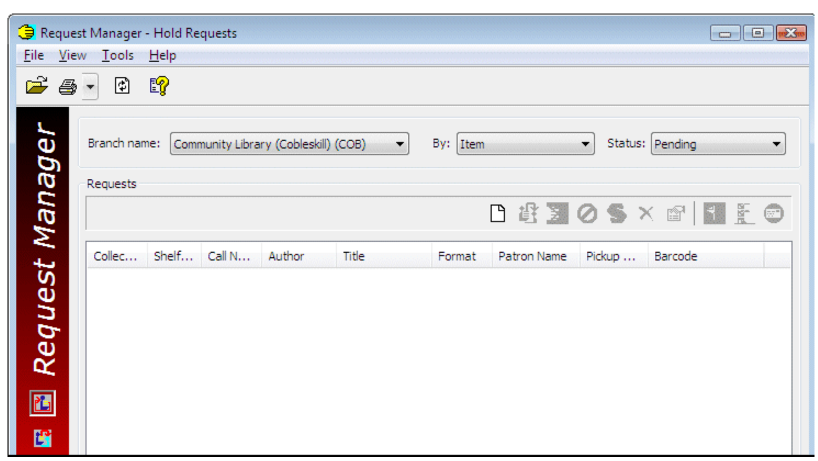
1. During check-in, when a message indicates that the item satisfies a hold, indicate that you want to hold the item (see "Do a normal check-in from the Check In workform" on page 126).

   The item status changes to Held. Your library may display an additional message indicating that the item fills a Borrow by Mail Request. Click **OK**.



2. Select **Circulation, Request Manager** from the Polaris Shortcut Bar.

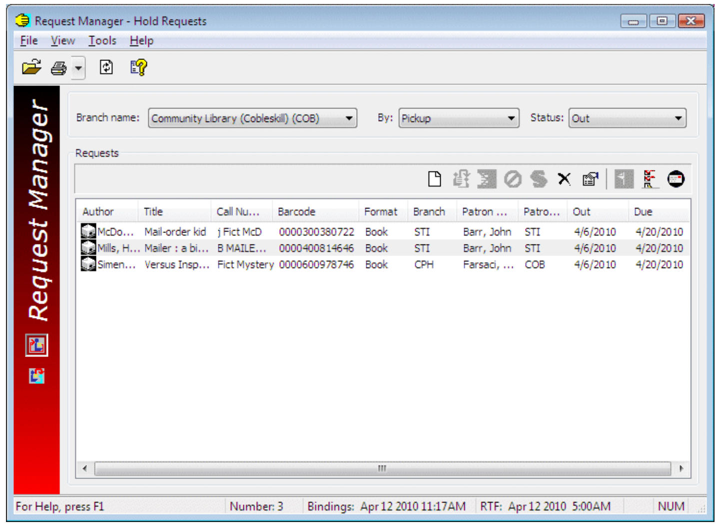
   The Request Manager workform - Hold Requests view appears.



3. Select your branch (the processing center) in the **Branch name** box, and select **Pickup** in the **By** box.

4. Select **Held** in the **Status** box.

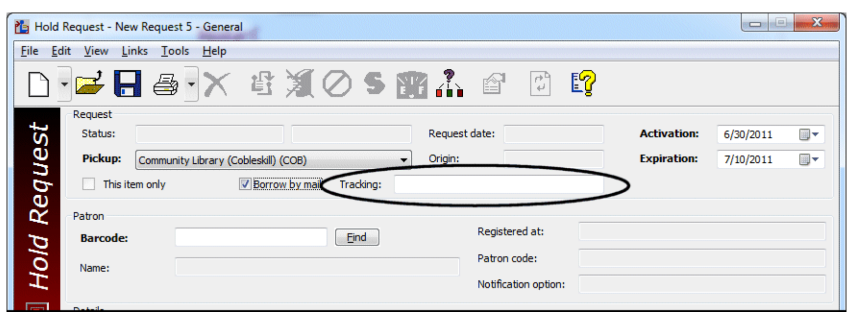
   In the list of Held items, Borrow by Mail requests are marked by a package icon . Item-level Borrow by Mail requests are marked by the package icon with the letter I .



5. To print a checklist of the items to be mailed, select the Borrow by Mail items and click above the Requests list.

   Note:
   The checklist is available for Shipped, Held, and Out requests.

   If your postal meter generates package tracking numbers, you can note them or stick them on the checklist. Later, you can enter the tracking numbers in the **Tracking** field on the appropriate Hold Request workforms.



6. Check out the Borrow by Mail item to the requesting patron:

   a) Select the item.

   b) Click above the Requests list, or right-click and select **Bulk Check Out** on the context menu.

   If an extended loan period has been set for Borrow by Mail items, the due date is calculated with the extended loan period. If a fee has been set for Borrow by Mail processing, the appropriate fee is charged to the respective patron accounts. The system uses the processing center's settings for the loan period and fee. When the items are checked out, the request status changes to Out and they can be listed in the Request Manager by the Out status.

   Important:
   If you check out a Borrow by Mail item to the requesting patron from the normal Check Out workform or the Patron Status workform, no extended loan period or fee applies.

   Notes:

   Blocks for held items do not affect bulk checkout. If an item cannot be checked out during bulk checkout due to other blocks on the patron account, your library may automatically send a failure notice to the patron. See "Setting Up Borrow by Mail Circulation" in the *Polaris Patron Services Administration Guide 4.1R2*.

   You can also bulk check out Borrow-by-Mail items with a status of Shipped (their status when they arrive at the processing center) without changing the status to Held first. This workflow may affect later statistical reporting for holds.

   If there are multiple processing centers in your system and a Borrow by Mail request's pickup branch differs from your workstation branch, a message appears and the item cannot be checked out.

7. To print the mailer, select the Borrow by Mail item and click above the Requests list.

   The printed mailer set for each item includes a cover letter, a mailing label, and a return label. The cover letter lists the Borrow by Mail fee, if any, the item data, and instructions for returning the item.

   Note:
   Mailer printing is available for requests with the status Out from the Request Manager and from the Patron Status workform - Requests view.

8. Package the item with the mailers and apply the postage.

   If your shipping equipment generates tracking numbers, note them on the checklist you printed from the Request Manager.

9. If your system uses tracking numbers, follow these steps to record them in the appropriate Hold Request workform.

a) In the Request Manager workform, set the branch to the processing center, the **By** field to **Pickup**, and the status to **Out**.

b) Right-click each Borrow by Mail request and select **Open** from the context menu.

The Hold Request workform opens.

c) Enter the tracking number (up to 60 characters) in the **Tracking** field on the Hold Request workform.

d) Save the hold request.

Related Information

- **Checking in returned items** - When patrons send back Borrow by Mail items, they are checked in using normal circulation procedures. See "Check-In" on page 122.
- **Polaris Administration settings** - Libraries specify processing centers, restrict Borrow by Mail options by patron code, establish a fee for the service, and allow exceptions to the fee for some patrons, such as homebound (Outreach Services) patrons. See "Setting Up Borrow by Mail Circulation" in the *Polaris Patron Services Administration Guide 4.1R2* for more information about these and other Borrow by Mail settings.

Borrow by Mail Reports

Borrow by Mail reports help you track Borrow by Mail requests. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Patron Services, Borrow by Mail** in the Polaris Reports dialog box.

- For information on generating reports, see "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*.
- For detailed descriptions of specific Borrow by Mail reports, see "Borrow by Mail Reports" in the *Polaris Basics Guide 4.1R2*.

Outreach Services Processing

If your Polaris system includes outreach services functions, you can automatically select titles that interest your homebound patrons based on each patron's preferences, and have the materials delivered to the patrons. When you designate a patron for outreach services, you create a profile of reading preferences and other characteristics. Based on this profile, Polaris generates a selection list of titles from which you select available items for a pick list, pull the items on the list, and check them out. If the outreach services patron has designated an individual to pick up the items, you contact the individual, and the items circulate in the normal way. Or, after pulling the items on the pick list, you may process them for delivery. You can set the packed items aside for the delivery drivers, or if the delivery method is by mail, you can print mailing labels or export patron address information to another application. You can also manage outreach services for multiple patrons, based on the next scheduled delivery date or delivery method and route.

Your library may also collect title ratings from outreach services patrons. You send a packing list to the patron along with the items checked out, and the patron returns the packing list with title ratings when the items are returned. You then enter the ratings in the patron's reading history.

An outreach services "patron" does not have to be an individual. If your library circulates items to institutions such as long-term care facilities, you can set up a patron record for the institution and designate the institution as an outreach services patron. With this method, you can track and control the items that circulate to the institution.

The default values and available options for outreach services are set in Polaris Administration. See "Setting Up Outreach Services" in the *Polaris Patron Services Administration Guide 4.1R2*.

> **Note:**
> If your system does not include Polaris Outreach Services, the features described in this unit are not available.

This unit covers the following topics:

Creating Outreach Patron Profiles

Polaris selects potential titles for outreach patrons based on settings in the patron record, including reading preferences and whether items checked out in the past should be re-sent after a specified period of time. You can note any disability or special equipment needs the patron may have, the number of items a patron should receive, and whether the patron chooses items from a system-generated list, or accepts any items the system has identified. Settings in the patron record also control delivery options for the patron. You can suspend outreach services for a particular patron, and reactivate them later as needed.

1-2-3

Set up outreach services for a patron

Follow these steps to set up and start outreach services for a patron.

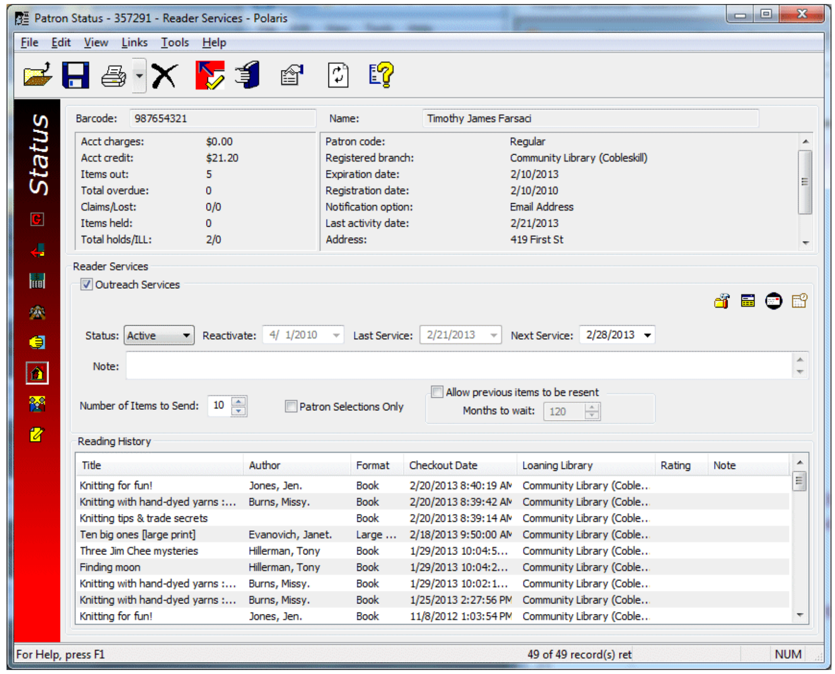
Important:
Since title selections for an outreach services patron can depend on what the patron has checked out in the past, reading histories are automatically activated for outreach services patrons even if your branch does not normally keep patron reading histories. See "Working with Reading Histories" on page 42.

1. Display the patron's record in the Patron Status workform, using one of these methods:
   - From the Patron Registration workform, press **F9**.
   - From the Polaris Shortcut Bar, select **Circulation**, **Patron Status** (or press **F6**). Use the Find Tool to find and open the patron's status record. See "Find patron services and related records" on page 14.

   The Patron Status workform opens to the Items Out view.

2. Select **View, Reader Services** or click to display the Reader Services view.

   Note:
   You need the Circulation permission **Patron status: Modify reader services** to do the next steps in this procedure.



3. Select (check) **Outreach Services** to designate this patron as a participant.
4. Type or select the number of items the patron should receive in the **Number of Items to Send** box.

   This setting is for information only and does not affect any automatic processing.
5. To indicate that the patron should review the list of items before delivery, select (check) **Patron Selections Only**.

   For more information about this workflow, see "Processing Outreach Services Items" on page 283.
6. Indicate whether items already in the patron's reading history can be sent again:
   - To allow the same items to be re-sent to the patron, select (check) **Allow previous items to be re-sent**, and specify the number of months that must elapse before an item is eligible to be re-sent. You can enter up to 120 months. Checking this option may be useful if the "patron" is an institution. You may want items to be re-sent so that more people at the institution can use them.
   - When this option is unchecked (cleared), items appearing in the patron's reading history will not be included in the patron's selection list.

     Note:
     If an item or bibliographic record is deleted, the entry remains in the reading history.
7. (Optional) Type a note regarding this patron's services in the **Note** box. You can enter a maximum of 255 characters.

8. Click  on the toolbar to save the settings, and continue with the set-up. See the following topics:
   - "Set the outreach patron's preferences" on page 277
   - "Set the outreach patron's delivery options" on page 280
   - "Suspend and reactivate outreach services for a patron" on page 281

1-2-3

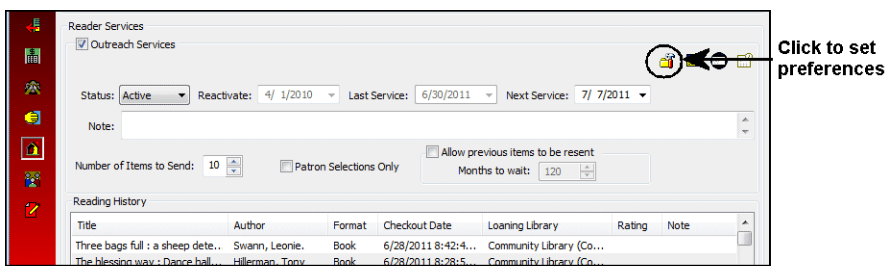
Set the outreach patron's preferences

The outreach patron's preferences determine what titles are included or excluded as possible selections. A title is selected based on subject, author, and genre preferences. You can also include or exclude titles based on target audience, material type, language, and publication date. Follow these steps to set the patron's preferences.

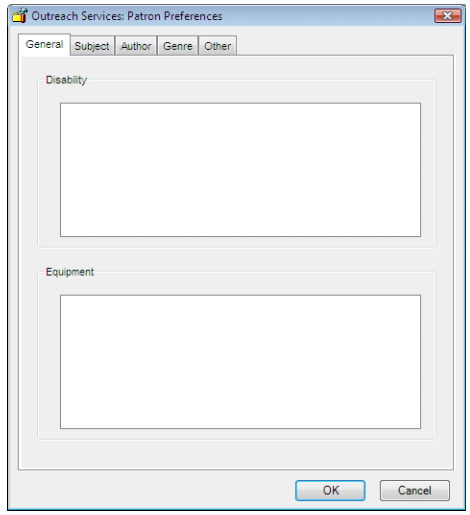
> **Note:**
> The options available for selection are determined by Polaris Administration settings. See "Setting Up Outreach Services" in the *Polaris Patron Services Administration Guide 4.1R2*.

1. Open the Reader Services view of the patron's Patron Status workform, if it is not already open. See "Set up outreach services for a patron" on page 275.

2. Click the Preferences icon .



The Patron Preferences dialog box (General tabbed page) opens.



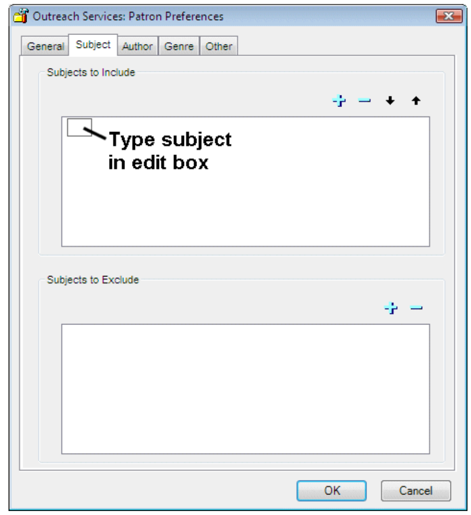
3. (Optional) Select any physical conditions or special equipment needs that apply to this patron in the Disability and Equipment lists.

   Your selections are informational only, in case your library delivers special equipment along with the materials. They do not affect what titles are selected for the patron. The options available for selection, if any, are determined by Polaris Administration settings. See “Setting Up Outreach Services” in the *Polaris Patron Services Administration Guide 4.1R2*.

4. Click the **Subject** tab, and set the patron’s subject preferences:

   Important:
   Selection lists for Outreach Services patrons are generated by searches constructed from your patron preference entries (Subject, Author, Genre, Target Audience, Language, Material Type, Publication Date). All patron preference entries are used when the system constructs the search. If the record includes 50 or more preference entries, the selection list fails and a server error results. Enter fewer patron preferences to prevent the problem.

   - To specify a subject that the patron prefers, click  above the Subjects to Include list. An edit box appears in the list. Type the subject in the edit box. A broad subject will retrieve more results; a more exact subject will retrieve fewer, more exact results. Multiple-word subjects are treated as explicitly truncated phrase searches (similar to the Find Tool). If you specify multiple subjects, the system searches for them with the equivalent of the search command **or**.



Note:

To remove a subject from the list, select the subject and click [–] above the Subjects to Include list. To move a subject higher or lower to indicate the patron's preferences, select the subject and click the arrow buttons. The order in the list does not affect the search results, but may help you indicate which subjects the patron more strongly prefers.

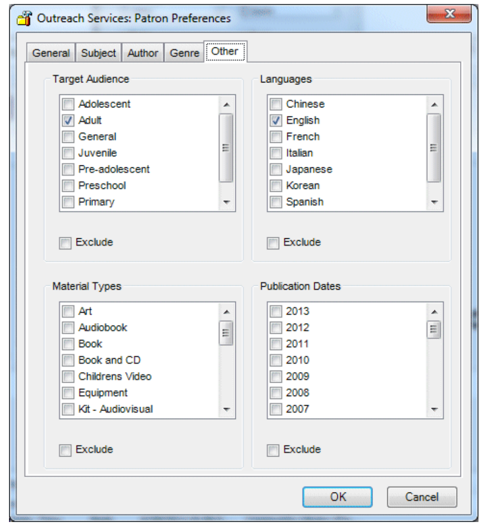
- To specify a subject to exclude from selection for the patron, click [+] above the Subjects to Exclude list. An edit box appears in the list. Type the subject in the edit box. (This is equivalent to the search command **and not**.)

Note:

To remove a subject from the list, select the subject and click [–] above the Subjects to Exclude list.

5. Click the **Author** and **Genre** tabs to set author and genre preferences. The selection process is the same as specifying subjects (see step 4). Multiple-word authors are treated as explicitly truncated phrase searches (similar to the Find Tool). Genre is a keyword search.

6. Click the **Other** tab, and set any target audience, language, material type, and date preferences.
   - To specify preferred options, select (check) the items in each list. You can select multiple items.
   - To exclude options from selection, select the appropriate items in a list and select (check) **Exclude** beneath the list.



7. Click **OK** to save the settings and close the dialog box.

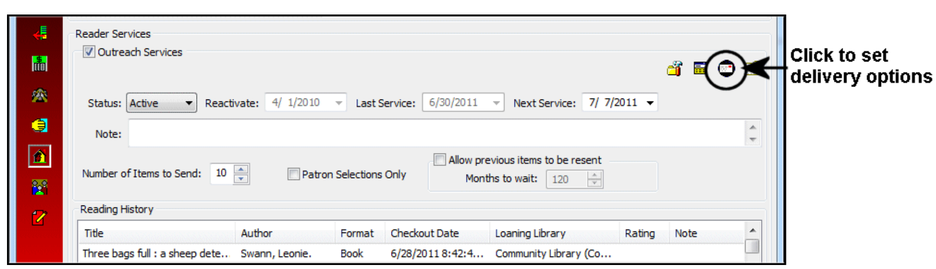
Set the outreach patron's delivery options

Follow these steps to set the patron's delivery options.

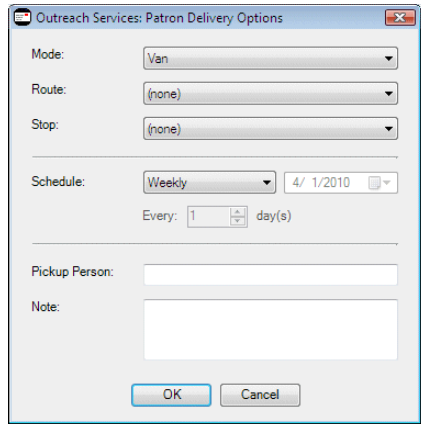
> **Note:**
> The options available for selection are determined by Polaris Administration settings. See "Setting Up Outreach Services" in the *Polaris Patron Services Administration Guide 4.1R2*.

1. Open the Reader Services view of the patron's Patron Status workform, if it is not already open. See "Set up outreach services for a patron" on page 275.

2. Click the Delivery Options icon .



The Patron Delivery Options dialog box opens.

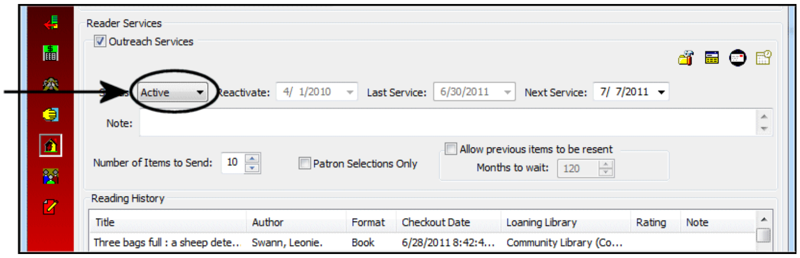


3. Select a delivery method from the **Mode** list.
4. Select a delivery route, if applicable, from the **Route** list.
5. Select a stop on the route, if applicable, from the **Stop** list.
6. Specify a frequency for this patron's selection list processing and deliveries in the **Schedule** box.
   - If you select a regular frequency, such as weekly or monthly, the system calculates the patron's next service date based on your setting, after the selection list is processed and items are checked out to the patron.
   - If you select **Daily**, specify the number of days between deliveries in the **Every . . . day(s)** box.
   - If you select **Exact date**, type a date in the format **mm/dd/year**, or click by the date and select a date from the calendar. This option sets the patron's next service date to the date you specify.
7. If you selected **Pickup** in the **Mode** box, type the name of the patron's designated representative in the **Pickup Person** box.
8. (Optional) Type any notes about the delivery in the **Note** box.
9. Click **OK** to save the settings and close the dialog box.

Suspend and reactivate outreach services for a patron

When you suspend outreach services for a patron, the patron is not included in automatic selection list processing. Follow these steps to temporarily suspend outreach services for a patron.

1. Open the Reader Services view of the patron's Patron Status workform, if it is not already open. See "Set up outreach services for a patron" on page 275.
2. Select **Inactive** in the Outreach Services **Status** box.



3. Specify the date to reactivate outreach services in the **Reactivate** box. You can type a date in the format **mm/dd/year**, or click and select a date from the calendar.

   When the date is reached, the patron's outreach service is automatically reactivated. The status is **Active**.

   Note:
   To reactivate a patron's outreach service manually, select **Active** in the **Status** box and specify today's date.

4. Click on the toolbar to save the settings.

Related Information

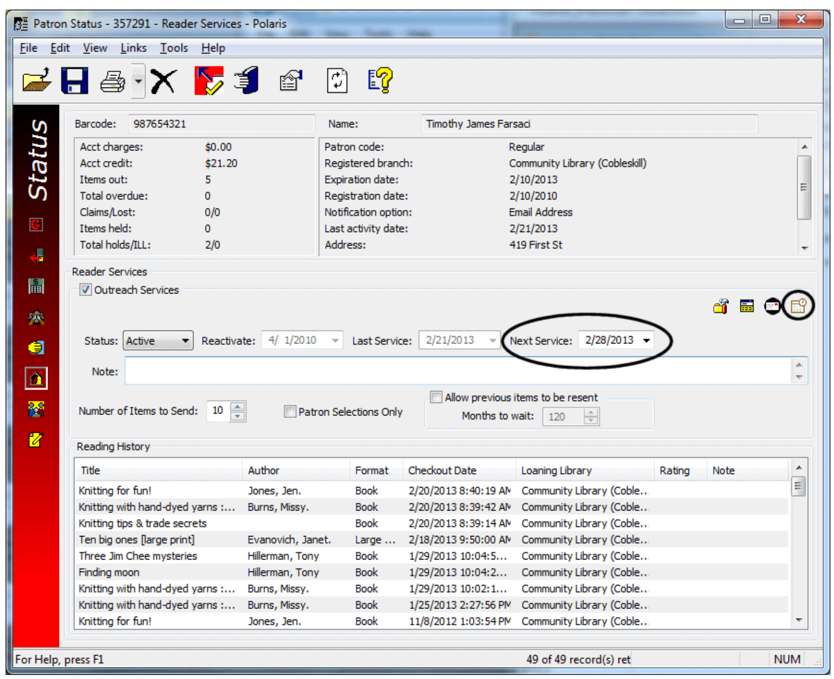
Permanently remove a patron from outreach services - Clear the **Outreach Services** check box on the Reader Services view of the patron's Patron Status workform.

Note:
If your branch uses Outreach Services but has not enabled reading histories for non-outreach services patrons, when you remove a patron from Outreach Services by clearing the **Outreach Services** check box, the patron's reading history will not be cleared. The history remains unless items are manually removed. See "Remove items from a patron's reading history" on page 45.

Processing Outreach Services Items

When patrons are due for outreach services, as determined by the frequency setting in the patron record and the last date of service, you can generate selection lists of potential titles based on patron preferences and other outreach services settings in the patron record. From the selection list, you determine what specific items are available, and select the items for the pick list. You can check items out directly from the pick list, or place holds on individual items as necessary. When an item is checked out to an outreach services patron, the item is removed from the patron's pick list. The last service date is automatically updated, and the next service date is calculated based on the schedule you set for the patron. See "Set the outreach patron's delivery options" on page 280.

You can also set the next service date manually, overriding the system calculation. Select **Next Service** in the Patron Status workform - Reader Services view, and type or choose another date. You can update the last service date to today's date. Click the update icon  in the Patron Status workform - Reader Services view.



You can select and process items for an individual patron, through the Patron Status workform - Reader Services view (see “Process items for an individual patron” on page 284), or you can process outreach services items for a group of patrons with the Outreach Services Manager (see “Process items for multiple patrons” on page 290). From a bibliographic record, you can also quickly display a list of outreach services patrons whose reading histories include items linked to the bibliographic record. See “Link from a bibliographic record to outreach services patrons” on page 298.

1-2-3

Process items for an individual patron

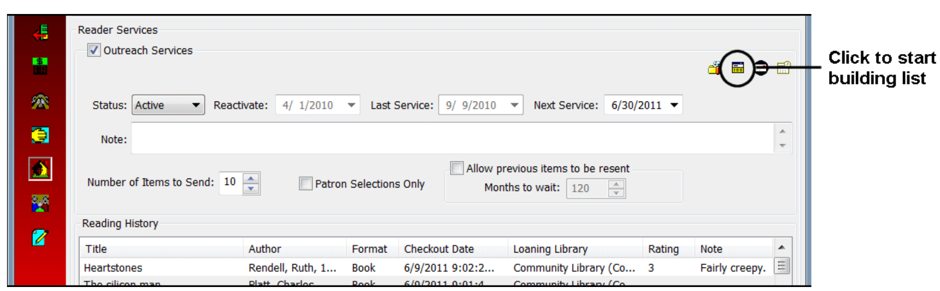
Follow these steps to create a pick list and check items out for a single patron.

> **Important:**
> You must set preferences for the patron before you build a list and process items for the patron. See “Set the outreach patron’s preferences” on page 277. Selection lists for Outreach Services patrons are generated by searches constructed from your patron preference entries (Subject, Author, Genre, Target Audience, Language, Material Type, Publication Date). All patron preference entries are used when the system constructs the search. If the record includes 50 or more preference entries, the selection list fails and a server error results. Enter fewer patron preferences to prevent the problem.

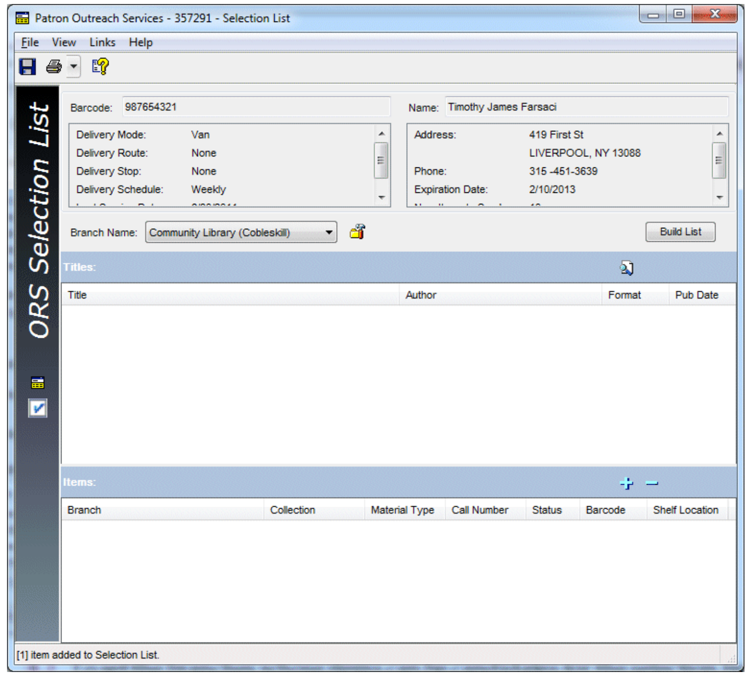
1. Open the Reader Services view of the patron’s Patron Status workform, if it is not already open. See “Set up outreach services for a patron” on page 275.

   > **Note:**
   > You need the Circulation permission **Patron status: Modify reader services** to do the next steps in this procedure.

2. Click the Selection List icon.



The ORS Selection List workform appears.



3. To set the branches whose items can be candidates for the selection list, select one of the following options in the **Branch Name** box:
   - Select **Default Branches** to restrict the items to a group of branches determined by your library.

     The default branches are set in Polaris Administration. See "Set branch items to include in outreach selection lists" in the *Polaris Patron Services Administration Guide 4.1R2*.
   - Select a specific branch to restrict the items to those belonging to the selected branch.

     Your library may allow only items from your logged-in branch, typically the branch where you are working, as selection list candidates. If this is the policy, only the logged-in branch is available in the list.
4. Click **Build List**.

   The Titles list displays titles (bibliographic records) with attached items that fill the requirements set by the patron's preferences and your branch selection. Titles are ranked by relevancy, but you can click a column head to sort by the list by title, author, or publication date. The physical items associated with these bibliographic titles are potential selections for the patron's pick list.
   - To find *any* title, regardless of the patron preference and settings, and add it to the selection list, click . The Polaris Find Tool opens. Search for the title, right-click it in the Find Tool results list, and choose **Select** from the context menu.

Note:
The Find Tool searches all branches, not just the branches selected in step 3. If a title is manually added by this method, all items attached to the bibliographic record are returned as candidates to add to the pick list (not just those assigned to included branches). See step 6.

- You can double-click a title to open the bibliographic record, or right-click the title in the selection list and select **Preview** to see more information about the title without opening the record.

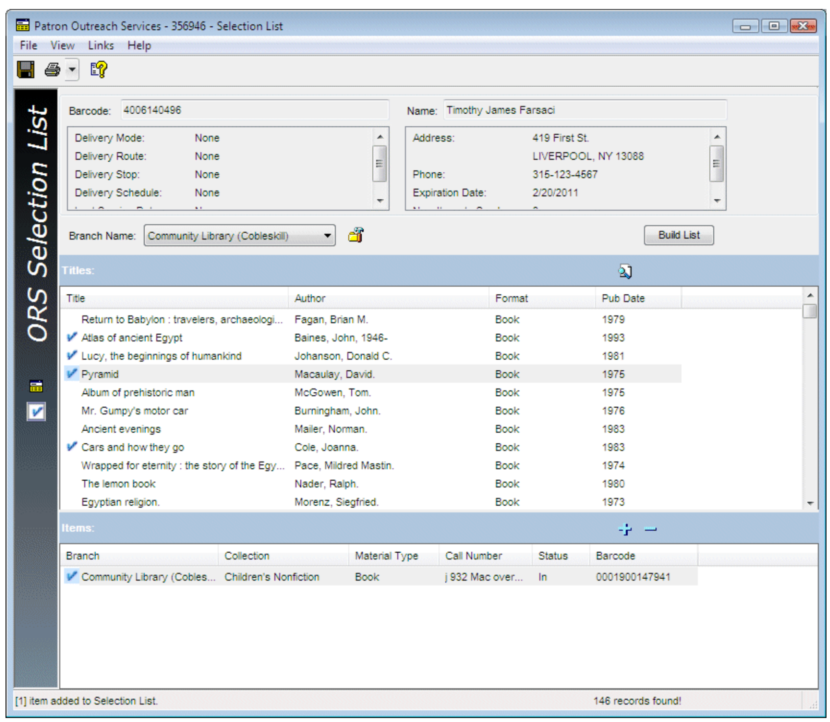
  Note:
  From a bibliographic record, you can display a list of outreach services patrons whose reading histories include items linked to the bibliographic record; that is, they have checked out the items in the past. See "Link from a bibliographic record to outreach services patrons" on page 298.

- To place a bibliographic-level hold request on the title for the patron, right-click the title in the selection list and select **Place hold** from the context menu.

5. Select a title in the Titles list.

The Items list displays the items associated with the selected title.

Note:
Using Polaris Administration settings, you can restrict the items that display by status; for example, you can suppress items that are Withdrawn or Lost. See "Set circulation statuses for outreach selection lists" in the *Polaris Patron Services Administration Guide 4.1R2*. If all the items attached to a bibliographic record are restricted, the title is not displayed.



6. To add an item to the pick list, select the title in the Titles list and click above the Items list.

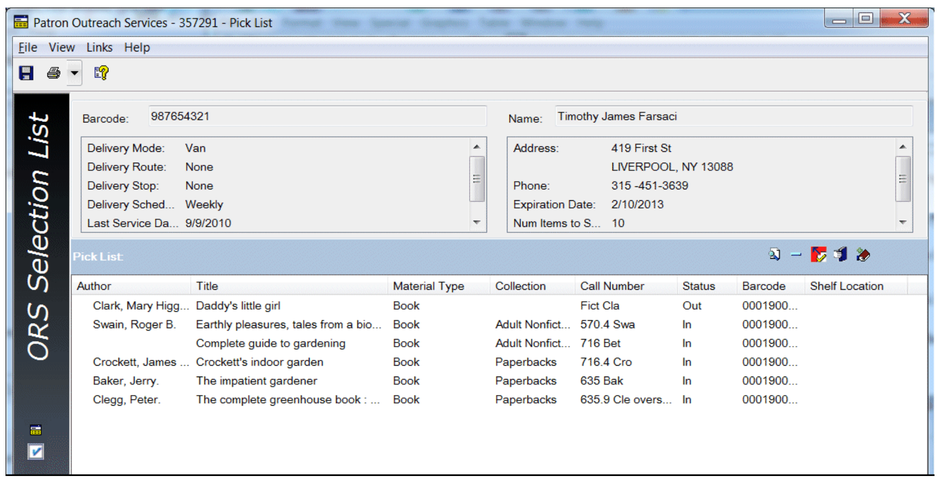
   A check icon appears beside the title and its associated item to indicate that the item has been placed on the pick list.

   Note:
   To place an item-level hold request on an item for the patron, right-click the item and select **Place hold** from the context menu.

7. Repeat steps 5 and 6 to continue to add items to the pick list.

8. Select **View, Pick List**, or click the Pick List view icon at the left side of the workform.

   The items you chose from the selection list appear in the pick list. The specific columns in the Pick List view depend on Polaris Administration settings. See “Set pick list column heads” in the *Polaris Patron Services Administration Guide 4.1R2*.



Tip:
If an item in the list is a serial, the serial designation (enumeration and chronology) is added to the title. You may need to expand the title column to see the designation.

- To remove an item from the pick list, select the item and click .
- To find an item and add it to the pick list, click . The Polaris Find Tool opens. Search for the item, right-click it in the Find Tool results list, and choose **Select** from the context menu.
- To add a patron’s held items to the pick list, click . If no items are being held for the patron, you see a message. If there are held items, they are added to the pick list. A Held for Patron icon marks the held items in the pick list.

9. Click to save the pick list.

10. Process the pick list, choosing the appropriate method:

- Select **File, Print, Pick List**, or click and select **Pick List**. Take the printed list to the shelves and pull the items to be checked out.
- If this patron selects items from the pick list, mail the printed list to the patron. When you receive the list back from the patron, remove the unwanted items from the list.

Tip:
If the patron is scheduled on a regular delivery route, you may want to suppress the hold notice that is normally generated when the request is available for pickup. Select (check) the **Exclude from hold notice** box on the Patron Registration workform - General view. See "Add general data to a patron record" on page 30.

- Place hold requests on items as necessary. Select the item or items, and click . See "Placing Hold Requests" on page 207. If the outreach services patron has a hold request for a title in the selection list and or an item in the pick list, an icon is displayed for the title or item.

  Note:
  When an item that fills an outreach patron's hold request is trapped at circulation, the note **Outreach Services Patron** appears on holds dialog boxes. See "Fill a hold request at circulation" on page 241.
- Check out the items directly from the pick list. See "Check out items from the pick list" on page 288.

Related Information

"Process items for multiple patrons" on page 290

Check out items from the pick list

Follow these steps to check out items from a patron's pick list.

1. Open the Reader Services view of the patron's Patron Status workform, if it is not already open. See "Set up outreach services for a patron" on page 275.
2. Click the Selection List icon .

   The ORS Selection List workform appears.
3. Select **View, Pick List**, or click the Pick List icon at the left side of the workform.
4. From the pick list, select the item or items to check out.

   Use the **SHIFT** or **CTRL** keys to multi-select items.
5. If your library collects reader ratings, click the packing list icon above the pick list. If your library has set the packing list to print automatically when the items are checked out (see step 6), you can skip this step.

   The packing list with a rating line for each item is printed, ready to ship with the items. When the packing list is returned with the items, you enter the ratings in the patron's reading history. See "Working with Reader Ratings" on page 300.

Note:
After the items have been checked out, you can also print the packing list from the Patron Status workform - Items Out view.

6. Click  above the pick list (or right-click in the pick list, and select **Checkout** from the context menu).

The Check Out workform appears, with the patron's account information filled in.

- If there are any blocks on the patron's account, the Patron Blocks dialog box appears. Resolve the blocks (see "Manage patron blocks at circulation" on page 117), or cancel the check-out.
- A message asks if you would like to assign a special loan period. If you click **Yes**, the Special Loan dialog box appears. Set the special loan and click **OK**. For details, see "Assign a special loan period" on page 99.
- If specific items have been checked out to the patron in the past, a message appears. You can continue to check out the item, or cancel the check-out.

The items are checked out. If you have set Polaris to print check-out receipts from the Patron Status workform, the receipt prints. See "Setting Up Receipt Printing from Workforms" on page 79.

Note:
If your library collects reader ratings for outreach services patrons (see step 5), the packing list for reader ratings may print automatically in addition to the check-out receipt.

You can package the items for delivery according to library procedures, or notify the patron's designated representative that they are ready to pick up.

Note:
When an item on the patron's pick list is checked out to the patron, whether from the pick list or during normal circulation, the **Last Service Date** for outreach services is updated on the Patron Status workform - Reader Services view, and the patron's reading history is updated after overnight processing.

Related Information

- **Mailing labels** - For outreach services patrons who receive their materials by mail, you can print patron mailing labels or export the patron addresses to use in another application. See "Creating Patron Mailing Labels" on page 65.
- **Borrow by Mail** - Your library may use Borrow by Mail processing for outreach services and other patrons, where a patron can request a title and have the title checked out and mailed. See "Borrow By Mail Circulation" on page 260.

- **Reading histories for outreach services patrons** - Your library may set limits on reading histories for outreach services patrons that are different from those for other patrons. See "Set reading history limits for outreach patrons" in the *Polaris Patron Services Administration Guide 4.1R2*. Your library may also allow you to remove individual items from patrons' reading histories. See "Remove items from a patron's reading history" on page 45.
- **Outreach services patrons at normal check-out** - Your library may display a prompt during normal check-out to update an active Outreach Services patron's next service date if the item is not on the patron's pick list. If you choose to update the next service date from the prompt, the patron's Next Service Date and Last Service Date are updated based on the Outreach Services delivery schedule set for that patron. If no prompt is displayed, or if you choose not to update the service date, the patron's next service date is not affected. For information about setting the prompt to be displayed, see "Prompt - update next service date at normal check out" in the *Polaris Patron Services Administration Guide 4.1R2*.

1-2-3

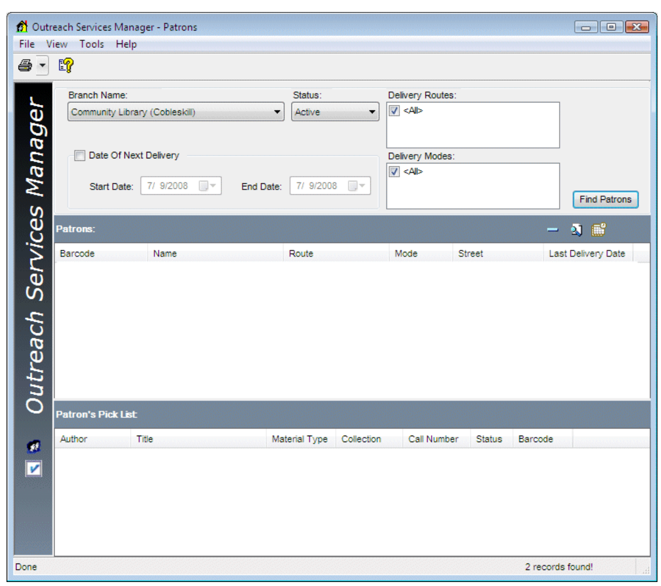
Process items for multiple patrons

Based on the patrons' registered branch, next service date, and other options you specify, you can create a combined pick list for multiple patrons. Follow these steps to create a combined pick list, and process the items on the list.

Note:
You need the Circulation permission **Outreach Services Manager: Access** to do this procedure. See "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*.

1. Select **Patron Services**, **Outreach Services** from the Polaris Shortcut bar, or click .

   The Outreach Services Manager opens.



2. Select the patrons' registered branch in the **Branch** box.

   Note:
   The logged-in branch (typically the branch where you are working) is selected by default.

3. Select the status of the patrons you want to process in the **Status** box:
   - **Active** - Process patrons currently due for service.
   - **Inactive** - Set up a selection list for inactive patrons. (You can select them when the Patrons list is generated, and change their status to Active.)

4. (Optional) To filter the list by the next scheduled delivery date, select (check) **Date of Next Delivery**, and type or select a start date and end date.

   This option sets the list to patrons due for service within the date range you specify. If you do not select this option, patrons due for service on *today's date only* are eligible for the list.

5. (Optional) To filter the patron list by delivery method, select a method in the **Delivery Modes** box.

   Example:
   To create a pick list for all patrons due for service and who receive their materials by driver, select **Driver** in the **Delivery Modes** box. Polaris Administration settings determine the actual available options.

6. (Optional) If the delivery mode you selected has delivery routes, and you want to filter the list by route, select the route in the **Delivery Routes** box.

7. Click **Find Patrons**.

   The Patrons list displays the outreach patrons matching your search criteria.

   Notes:
   To find *any* patron, regardless of the filters you set, and add the patron to the list, click . The Polaris Find Tool opens. Search for the patron record, right-click it in the Find Tool results list, and choose **Select** from the context menu. *However, this operation clears any combined pick list that already exists in the Outreach Services Manager*.

   You can double-click a patron line to open the Patron Status workform - Reader Services view for the patron.

8. Check for individual patron pick lists, and create them if necessary, by following these steps:

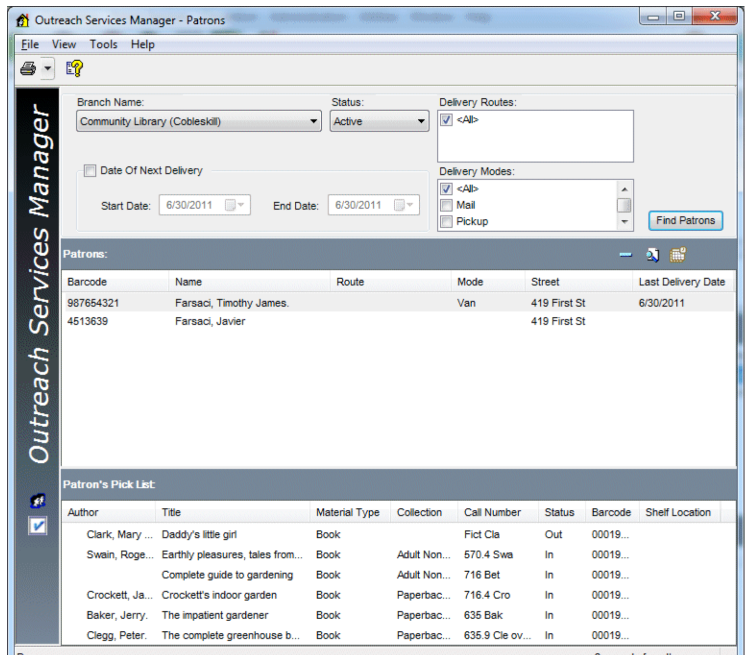
   a) Select each patron in turn from the list. The patron's pick list appears in the Patron Pick List portion of the workform.

   b) If a patron does not have a pick list, right-click the patron's name and choose **Selection List** from the context menu.

   The ORS Selection List workform for the patron appears. Create a pick list for the patron, then save the list. See "Process items for an individual patron" on page 284 for details.

Important:
Selection lists for Outreach Services patrons are generated by searches constructed from your patron preference entries (Subject, Author, Genre, Target Audience, Language, Material Type, Publication Date). All patron preference entries are used when the system constructs the search. If the record includes 50 or more preference entries, the selection list fails and a server error results. Enter fewer patron preferences to prevent the problem.

A message asks whether you want to refresh the Outreach Services Manager combined pick list. Select **Yes** to update the information in the Outreach Services Manager with the patron's new pick list.



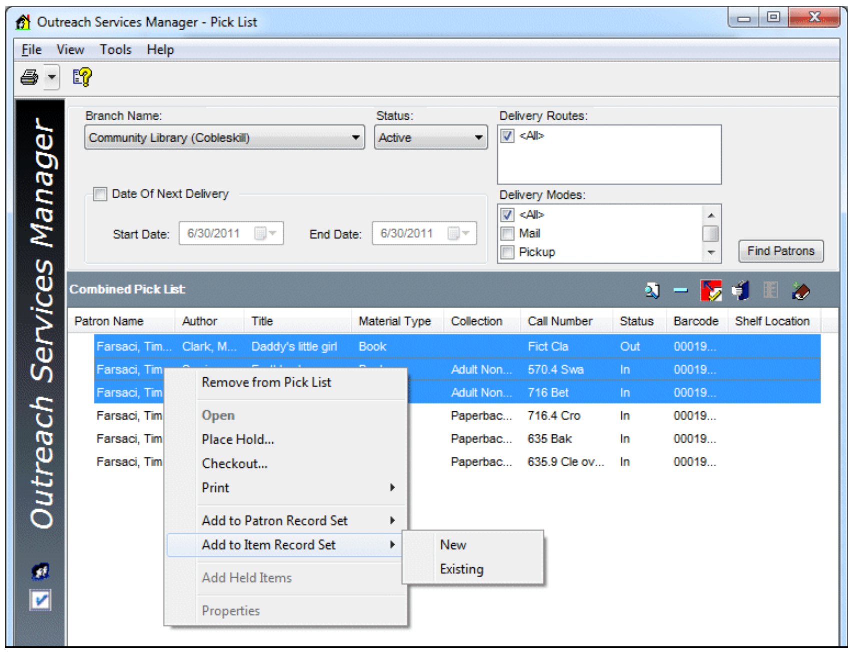
9. To add patrons or items in the Combined Pick List to a record set, follow these steps:

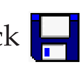
> **Important:**
> Record sets are useful if you want to preserve information for later processing. When the Outreach Services Manager workform is closed and re-opened, the old information is gone and the workform is ready for a new round of processing.

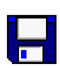
a) Select the line items in the Combined Pick List.

b) Right-click in the list, and select **Add to Patron Record Set** or **Add to Item Record Set** from the context menu.

c) Select **New** or **Existing**.

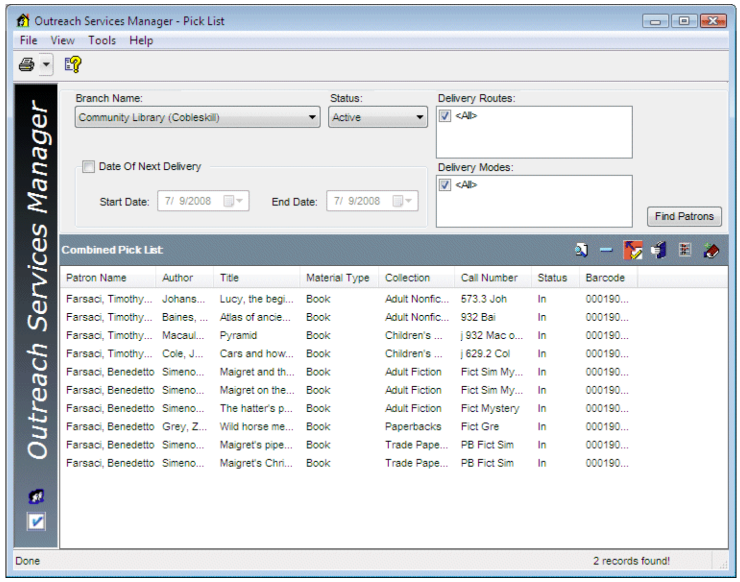


d) If you selected **New**, the new record set opens and the patrons or items are added to the set. Name the new record set and click  on the Record Set workform.

e) If you selected **Existing**, the Polaris Find Tool appears. Search for the record set to which you want to add the patrons or items. Right-click the record set in the results list, and choose **Select** from the context menu. The record set opens, and the patrons or items are added to the set. Click  on the Record Set workform.

10. Select **View, Pick List**, or click the Pick List icon  at the left side of the workform.

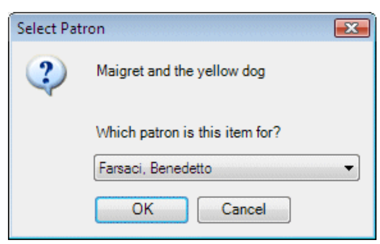
The items from each patron's pick list appear in the Combined Pick List, organized by patron.



11. To edit the Combined Pick List, choose one of these options:

- To remove an item from the pick list, select the item in the Combined Pick List and click .
- To find an item and add it to the pick list, click . The Polaris Find Tool opens. Search for the item, right-click it in the Find Tool results list, and choose **Select** from the context menu.

  A dialog box prompts you to select the patron for whom you are adding the item. Select the patron, and click **OK**.



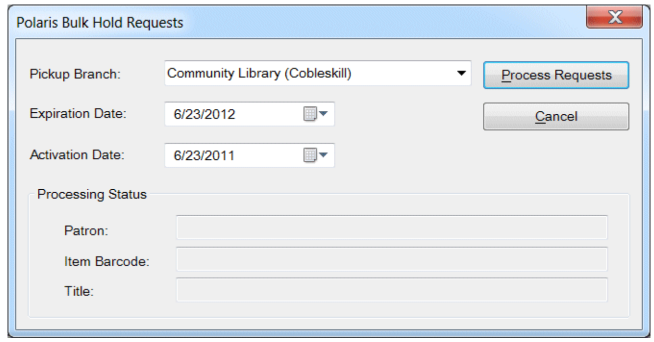
- To add a patron's held items to the pick list, select the patron and click . If no items are being held for the patron, you see a message. If there are held items, they are added to the pick list. A Held for Patron icon  marks the held items in the pick list.

12. To place hold requests for items, follow these steps:

a) Select the appropriate items in the Combined Pick List, and click .

Use the **CTRL** or **SHIFT** keys to select multiple items.

The Bulk Hold Requests dialog box appears.



b) Specify the pickup branch, activation date, and expiration date for the hold requests, and click **Process Requests**.

As each patron's request is processed, the information appears in the Processing Status boxes.

c) If there are any blocks on a patron's account, the Patron Blocks dialog box appears. Resolve the blocks (see "Manage patron blocks at circulation" on page 117), or cancel the hold request for that patron.

d) Click **X** to close the Bulk Hold Requests dialog box.

For more information about hold requests, see "Placing Hold Requests" on page 207.

If you place a hold request for outreach services patrons who are scheduled on a regular delivery route, you may want to suppress the hold notice that is normally generated when the request is available for pickup. Select (check) the **Exclude from hold notice** box on the Patron Registration workform - General view (see "Add general data to a patron record" on page 30) for these patrons.

13. Process the Combined Pick List, choosing the appropriate method:

- Select **File, Print, Pick List**, or click and select **Pick List**. Take the printed list to the shelves and pull the items to be checked out.
- Check out the items directly from the pick list. See step 15.

14. If your library collects reader ratings, click the packing list icon above the pick list. If your library has set the packing list to print automatically when the items are checked out, you can skip this step.

A separate packing list for each patron, with a rating line for each item, is printed, ready to ship with the items. When the packing list is returned with the items, you enter the ratings in the patrons' reading histories. See "Working with Reader Ratings" on page 300.

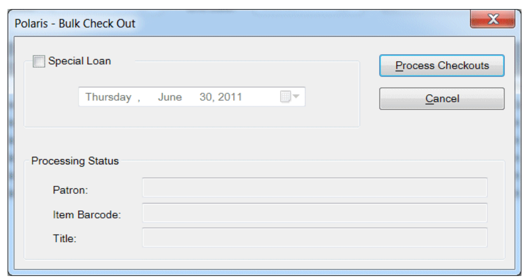
> **Note:**
> After the items have been checked out, you can also print the packing list from the Patron Status workform - Items Out view.

15. To check out items on the Combined Pick List, follow these steps:

a) Select the appropriate items in the Combined Pick List, and click .

Use the **CTRL** or **SHIFT** keys to select multiple items.

The Bulk Check Out dialog box appears.



b) If you want to set a special loan period for all the items processed in this checkout, select (check) **Special Loan** and type or select the due date.

c) Click **Process Checkouts**.

As each checkout transaction is processed, the information appears in the Processing Status boxes.

- If there are any blocks on a patron's account, the Patron Blocks dialog box appears. Resolve the blocks (see "Manage patron blocks at circulation" on page 117), or cancel the check-out for that patron.
- If specific items have been checked out to the patron in the past, a message appears. You can continue to check out the item, or cancel the check-out.

Tip:
The bulk check-out receipt is a useful check list as you prepare the items for delivery. If your library collects reader ratings for outreach services patrons (see step 12), the packing list for reader ratings may print automatically in addition to the check-out receipt.

d) Click **X** to close the Bulk Check Out dialog box.

The items are checked out. If you have set Polaris to print check-out receipts from the Outreach Services Manager workform, the bulk check-out receipt prints. See “Setting Up Receipt Printing from Workforms” on page 79.

Note:
Select **File, Print, Pick List Report**, or click and select **Pick List Report,** to print a report that indicates whether patrons have read or placed hold requests on their items. You can sort the information on the report by call number, collection, title, patron name, date of service, route, and/or delivery mode.

16. To update the last service date for all the patrons in the combined pick list manually, without checking out items from the pick list, follow these steps:

a) Select **View, Patrons** on the Outreach Services Manager workform, or click .

b) Click above the Patrons list.

The last service date is updated.

Related Information

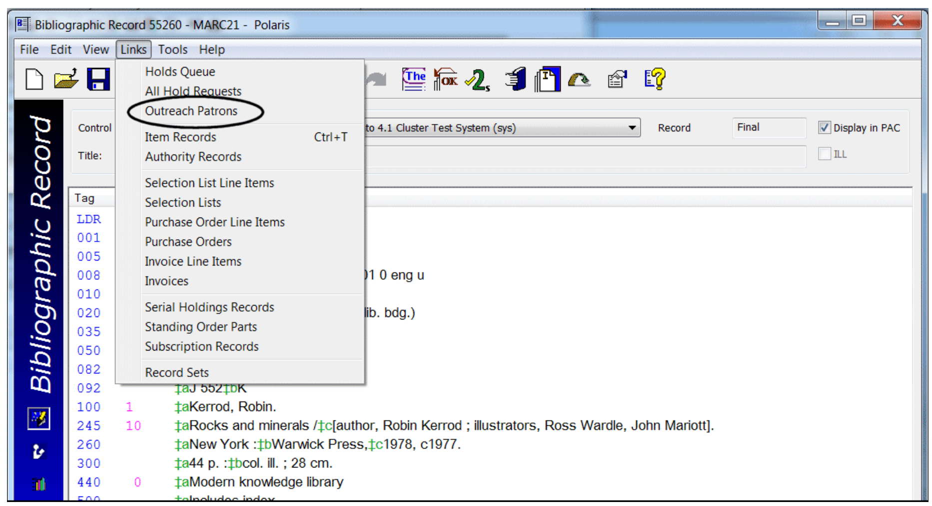
- **Mailing labels** - For outreach services patrons who receive their materials by mail, you can print patron mailing labels or export the patron addresses to use in another application. See “Creating Patron Mailing Labels” on page 65.
- **Borrow by Mail** - Your library may use Borrow by Mail processing for outreach services and other patrons, where a patron can request a title and have the title checked out and mailed. See “Borrow By Mail Circulation” on page 260.
- **Reading histories for outreach services patrons** - Your library may set limits on reading histories for outreach services patrons that are different from those for other patrons. See “Set reading history limits for outreach patrons” in the *Polaris Patron Services Administration Guide 4.1R2*. Your library may also allow you to remove individual items from patrons’ reading histories. See “Remove items from a patron’s reading history” on page 45.

Link from a bibliographic record to outreach services patrons

You can link from a bibliographic record to the patron records of outreach services patrons with linked items in their reading histories. If you are searching for items for an outreach services patron, you can use this method to see if the patron has already read the title, without opening the patron record and sorting though the patron's reading history.

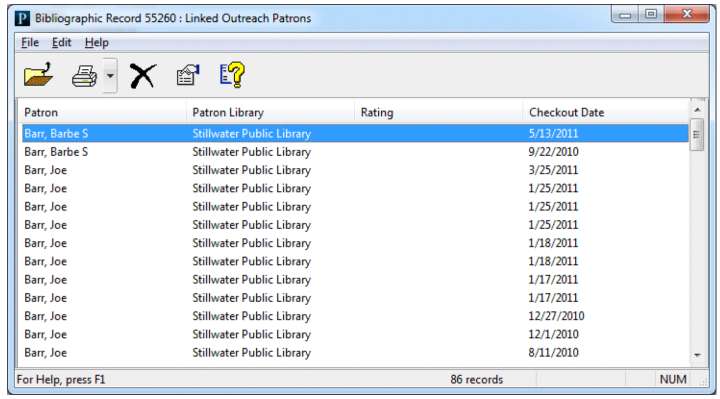
Note:
This feature is available if Outreach Services is licensed for your log-on branch. You need the system-level Circulation permission **ORS: Link from bibliographic record: Allow** to use this feature.

1. Select **Links, Outreach Patrons** from the Bibliographic Record workform, or right-click a bibliographic record in the Find Tool search results list and select **Links, Outreach Patrons** from the context menu.



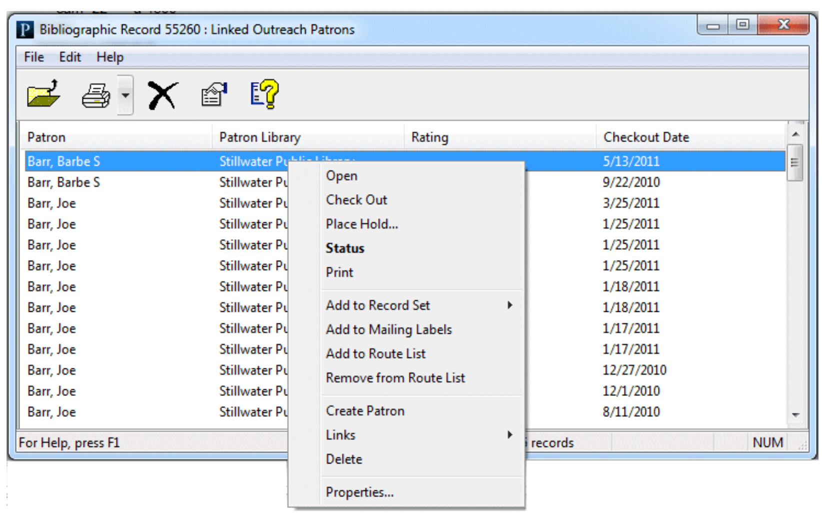
The list of linked outreach services patron records is displayed if one or more items are included in a patron reading history and the patron's outreach services status is Active. (If you select **Links, Outreach Patrons** and no qualified patron records are linked to the bibliographic record, a message is displayed instead. If only one patron record qualifies for display, the record is opened in the Patron Status workform - Reader Services view.) The list includes patron names, registered branches, ratings if available, and last check-out date.

Note:
The patron's outreach services status must be Active to appear in the list.



- If the patron has checked out an item more than once, the entry appears multiple times.
- If the title is removed from the patron's reading history, the link is not displayed in the list.
- If the item record status is Deleted, the entry remains in the patron reading history and the link from the bibliographic record is still displayed in the list. When the item record is purged, the link is no longer displayed in the list.

2. To work with a patron record, right-click a patron listing to open a context menu of circulation and patron status options.



For example, if you select **Status** from the context menu, the Patron Status workform - Reader Services view opens.

Working with Reader Ratings

If your library collects reader ratings from outreach services patrons, a packing list with a rating line for each item is delivered to the patron with the checked-out items. (See "Check out items from the pick list" on page 288 and "Process items for multiple patrons" on page 290.) The ratings ar e returned with the items, and you enter the ratings and notes, if necessary, in the reading history for the patron account. Several ratings reports are available from the Polaris Shortcut Bar; see "Reader Ratings Reports" in the *Polaris Basics Guide 4.1R2*.

Note:
The rating scale is set up in Polaris Administration. See "Setting Up Reader Ratings" in the *Polaris Patron Services Administration Guide 4.1R2*.

Add or modify reader ratings in the patron account

Follow these steps to add or modify reader ratings in the patron account.

Note:
You must have the Circulation permission **Modify ORS patron ratings: Allow** for the patron's registered branch to do this procedure.

1. Display the patron's record in the Patron Status workform, using one of these methods:
   - From the Patron Registration workform, press **F9**.
   - From the Polaris Shortcut Bar, select **Circulation, Patron Status** (or press **F6**). Use the Find Tool to find and open the patron's status record. See "Find patron services and related records" on page 14.

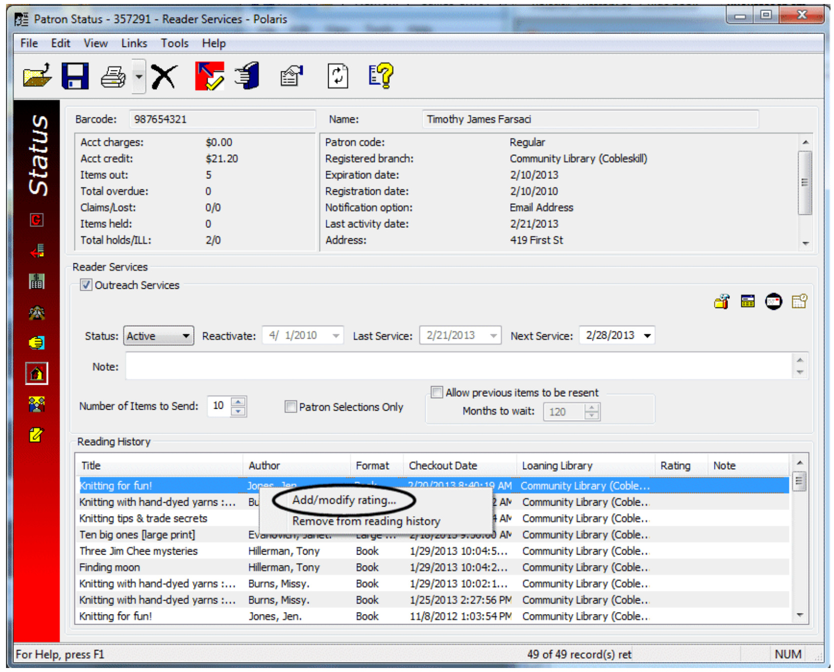
   The Patron Status workform opens to the Items Out view.

2. Select **View, Reader Services** or click to display the Reader Services view.

   The items that the patron has checked out appear in the Reading History list. The list is loaded in groups of 100 items as you scroll through it. To load the entire list at once, press **CTRL+ALT+A**.

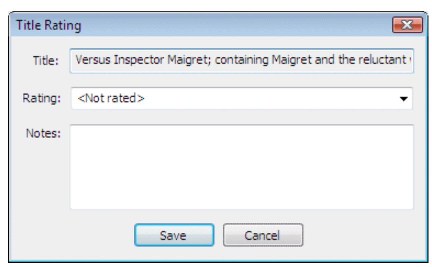
   The reading history may include duplicate titles if the patron has checked out the title multiple times. If the patron has rated the same title differently on different occasions, you can add the different ratings to the appropriate instances of the title.

3. In the Reading History list, right-click the title to be rated and select **Add/modify rating** from the context menu.



Note:
Bibliographic records with the status of Provisional, Final, or Deleted can be rated. When bibliographic records are purged, any ratings associated with them are lost.

The Title Rating dialog box opens.



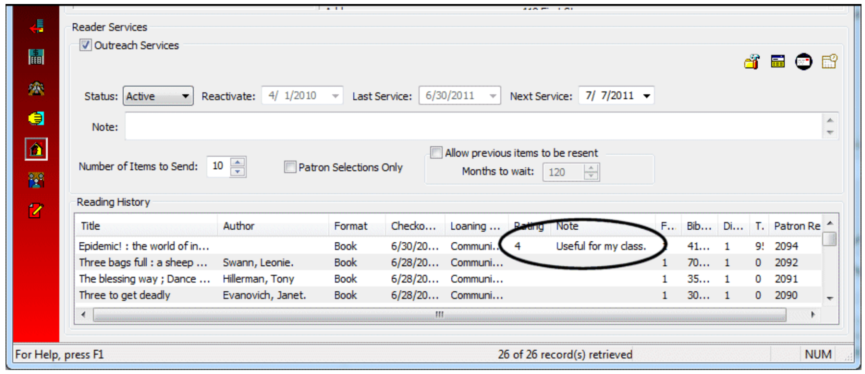
Tip:
If you just want to enter the number, type the number and press **ENTER**. The rating is saved and the dialog box closes.

4. Select a rating number from the list, and add a note if desired.

The value **Not rated** (0) indicates that the list was returned but the title was not rated.

5. Click **Save**.

The Reading History list displays the rating number and the associated note, if any.



6. To modify an existing rating, right-click the title with the rating and repeat steps 4-5.
7. Select **File, Save**.

Related Information

- **Rating scale** - The rating scale is set up in Polaris Administration. See "Setting Up Reader Ratings" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Ratings reports** - See "Reader Ratings Reports" in the *Polaris Basics Guide 4.1R2*.

Outreach Services Reports

Outreach Services reports can help you organize and track outreach services processing. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Outreach Services** in the Polaris Reports dialog box.

- For information on generating reports, see “Using Polaris Standard Reports” in the *Polaris Basics Guide 4.1R2*.
- For detailed descriptions of specific Outreach Services reports, see “Outreach Services Reports” in the *Polaris Basics Guide 4.1R2*.

Managing Course Reserves

If your Polaris system includes course reserve functions, you can place materials on reserve for use in a class during a semester or term. Materials can be taken from the regular collection and placed on reserve, or instructors may bring in personal material to be placed on reserve. The items may circulate outside the library, or within the library only.

Polaris uses special course reserve records to process course reserves. These store information about the courses for which items are placed on reserve. In addition, Polaris handles the reserved items through reserve item "records," which are views of Polaris item records for materials placed on reserve. The reserve item record can carry its own circulation settings, which may be different from those in effect if an item is taken off reserve and returned to the regular collection. Staff and patrons can search for course records and reserve materials from the staff client and the PAC.

Note:
3M ebooks cannot be placed on course reserve.

Specific permissions are required to work with course reserves. See "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*.

This unit covers the following topics:

Setting Up Course Reserve Records

Course reserve records store course, term, and instructor information, and maintain links to the items that have been placed on reserve for the course. The course reserve record is also linked to a patron record that contains information about the instructor.

When you create a new course reserve record, you can select the course name, course number, and section number from options set in Polaris Administration, or you can select a course from a list of existing courses. If the appropriate course information is not available for selection, you can type the information. The new information is then added to the new course reserve record and to the Polaris Administration tables, so it is available for selection in other course reserve records for your branch. However, options for the term/year, school/division, and department must be set up in Polaris Administration.

Note:
The default values and available options in the Course Reserve workform are set in Polaris Administration. See "Setting Up Course Reserves" in the *Polaris Patron Services Administration Guide 4.1R2*.

Finding Existing Course Reserve Records

Tip:
Use **Limit by** options to focus your search, and **Sort by** options to sort the results list.

Select **Cataloging** (or **Patron Services**), **Course Reserve Records** to search for existing course reserve records with the Find Tool. For general information about using the Find Tool, see "Finding Polaris Records" in the *Polaris Basics Guide 4.1R2*. You can search by the following access points:

- **Course Name** - If the course name begins with an article (A, An, The), you must include the article or use a wildcard character. If you are not sure, use the wildcard character.

  Example:
  To find a course named The Middle Ages, you can type **the middle ages**, ***middle ages**, or ***middle**. If you type **middle ages**, the search does not find the course record.

- **Course Name/Number**
- **Course Number/Section** - Type just the course number, or type the course number and section number.

  Example:
  There are two History 101 sections, section 01 and section 02. If you type **101**, the results list includes both sections (as well as any other courses numbered 101). If you type **101 02**, the results list includes only History 101 section 02 (as well as any other courses numbered 101 section 02).

- **Course Abbreviation**
- **Alternate Name**

- **Instructor (Last, First)** - Type the name *Lastname, Firstname.* Searches both primary and alternate instructors. The results are the course reserve records linked to the instructor's patron record.
- **School/Division**
- **Department**
- **Title** - Searches bibliographic record titles for records linked to a course reserve record. The results are the course reserve records linked to bibliographic records with this title.
- **Author** - Searches bibliographic record authors for records linked to a course reserve record. The results are the course reserve records linked to bibliographic records with this author.
- **Course Status**
- **Course Start Date**
- **Course End Date**

Note:
You can right-click a course reserve record in the Find Tool results list, and select **Links** in the context menu to access linked item and instructor records.

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Create a new course reserve record

You can create and save course records in advance, without linking any reserve items or instructors to them. Then, as a new term or semester begins, you can place items on reserve for the courses as the instructors provide lists of items already in the library collection, or provide actual materials. Follow these steps to create a new course reserve record.

Note:
If you will use much of the same information for many course reserve records, use a course reserve record template as the basis for new records. See "Create and use a course reserve template" on page 310.

Tip:
Click to display the New dialog box, or press **CTRL+N**.

1. Select **File, New** from the Polaris Shortcut Bar.

   The New dialog box appears.

   Note:
   You can also create a new record by selecting **File, New** from an open Course Reserve workform.

2. Select **Course Reserve** in the **Objects** box, and click **OK**.

   The Instructors view of the Course Reserve workform appears.

3. If necessary, select a record owner in the **Owner** box.

   The default is the branch where your workstation is located. Select another branch in the system, if appropriate.

4. Specify course information with one of the following methods:
   - **Select from a list of courses** - Select **Tools**, **Display All Available Courses**. The Available Courses dialog box appears. The available courses depend on which branch is designated in the **Owner** box. Select a course, and click **OK**. Course information from the course you selected fills the workform.
   - **Select from pre-set options** - Select the options from these lists: **Name** (required); **Number; Section.** When you select a name from the list, the **Abbreviation** field is automatically filled if an abbreviation has been set up for the course name. Different options may be available for different branches. The available options depend on which branch is designated in the **Owner** box.
   - **Type the course information** - Select **Tools**, **Add New Course Information**. The Add New Course Information dialog box appears. Type the course information in the appropriate fields, and click **OK**. The Add New Course Information dialog box closes, and the information you typed is added to the Course Reserve workform.

     Note:
     You must have the permission **Course reserve records: Create**, set in Polaris Administration, to use this method.
5. Select a course status in the **Status** box:
   - Select **Active** if you will be adding items for the current term or year. If the course reserve record is **Active**, patrons can search for it in the PAC.
   - Select **Inactive** if you are creating the record to use at another time. If the status is **Inactive**, the record is not available for PAC searches.
6. Select the appropriate options from the **School/Division**, **Department**, and **Term/Year** lists, if you want to set these options.

   If you select a **Term/Year** option, the **Start Date** and **End Date** boxes are automatically filled in.
7. (Optional) Fill in the following fields:
   - **Alternate Name** - You can specify an alternate or common name for the course, and use the Find Tool to search for the course reserve record by this name.
   - **Student count** - Number of students in the course
   - **Public Note** - Type any free-text note in this box. This note is displayed in PAC search results for the course reserve record.
   - **Non-public note** - Type any free-text note in this box. This note is displayed for the course reserve record in the staff client only.
8. Select **File, Save** to save the record.

   Note:
   When you save the course reserve record, Polaris checks for duplicate records based on the combination of course name, course number, and section number for the owning branch. If there is a duplicate record, a message is displayed.

If you want to designate instructors for this course at this time, click the Add Instructor icon to display the Add Instructor dialog box. See "Add instructors to a course reserve record" on page 308.

If you want to place items on reserve for this course at this time, select **View**, **Reserve Items** or click to display the Reserve Items view, and click the Add Items icon.
See "Place items on reserve from a course reserve record" on page 313.

Related Information

- **Deleting course reserve records** - Open the existing course record and select **File**, **Delete**, or right-click the record in a Find Tool results list and select **Delete** from the context menu. You cannot delete a course reserve record that has reserved items linked to the record.
- **Repeated courses** - If the same course is taught every term, you can create a course reserve record for each term, and transfer the items from one course to the next at the end of the term. See "Transfer a reserve item to a different course" on page 319. Another method is to use a single course record, changing the Term/Year setting at the end of each term. When you change the Term/Year setting, the Start Dates and End Dates of all the reserved items for the course are automatically updated.

  Note:
  If a course is taught frequently, but not necessarily every term, you can set the course reserve status to Inactive at the end of the term. The status of the reserved items for the course automatically changes to Not Reserved. When the course is taught again, you can reactivate the course and the reserve item.

1-2-3

Add instructors to a course reserve record

Instructors must have existing patron records in your Polaris system. Once an instructor is associated with a course, the instructor can access course reserve information from the PAC patron account. Follow these steps to add one or more instructors to a course reserve record.

1. Select **Cataloging** (or **Patron Services**), **Course Reserve Records** on the Polaris Shortcut Bar, or click .

   The Find Tool opens.

2. Search for the course reserve record with the Find Tool, and open the record from the results list.

   See "Finding Existing Course Reserve Records" on page 305. For general information about using the Find Tool, see "Finding Polaris Records" in the *Polaris Basics Guide 4.1R2*.

3. Click to display the Add Instructors dialog box.

4. Input the patron barcode of the instructor, using one of the following methods:
    - Scan the barcode from the instructor's library card, or type the barcode and press **ENTER**.
    - Click **Find** to display the Polaris Find Tool and search for the instructor's patron record. See "Find patron services and related records" on page 14.
5. To create more instructor links to the record, repeat the previous step until all the patron barcodes have been entered.
6. To designate an instructor as primary or alternate, select the instructor and select **Primary** or **Alternate** in the **Designation** box.

    The default setting is **Primary**. If you select multiple instructors, all receive the same designation.
7. To input a note, select the instructor and type the text in the **Note** box.

    If you select multiple instructors, the same note is added for each one.
8. Click **OK** to submit your settings.

    The Instructors view lists the instructors. The status bar indicates that the link has been created. In all the patron records you added as instructors, the **Instructor** check box is checked to indicate the link with a course reserve record.

Related Information

- **Designate an instructor from a patron record** - From an open patron record, select **Tools, Add to Course Reserve**. Use the Find Tool to identify and select the course reserve record.
- **Edit Notes and Designation** - In the Instructors view of the Course Reserve record, select the instructor, click  and edit the information.
- **Remove an instructor** - In the Instructors view of the Course Reserve record, select the instructor, and click to delete the link with the instructor's patron record.
- **Instructor's address** - The instructor's address in the Course Reserve record is taken from the **Office** address fields in the patron record. If no office address exists, the address is taken from the **Home** address fields, or from the first address available if there is no **Home** address. You can edit the office address in the patron record, and the changes are displayed in the course reserve records to which the instructor's patron record is linked.
- **Open a course reserve record from patron search results** - In the Find Tool results list, right-click the instructor's patron record and select **Links, Existing, Course Reserves** from the context menu. The associated records open.

- **Open an instructor's record from course reserve search results** - In the Find Tool results list, right-click the course reserve record and select **Links, Existing, Instructors**. The associated patron records open.
- **Open a course reserve record from an instructor's patron record** - In the instructor's patron record, select **Links, Course Reserves**.

Create and use a course reserve template

If you use much of the same information for many course reserve records, a template can simplify the creation of new records. Follow these steps to create a course reserve record template, and use the template to create new records.

1. Select **File, New** from the Polaris Shortcut Bar.

   The New dialog box appears.

2. Select **Course Reserve Template** in the Objects list, and click **OK**.

   The template workform appears.

3. Fill in the template, as necessary. See "Create a new course reserve record" on page 306.
4. Select **File, Save** to save the template.

   The status bar indicates that the template was saved successfully.

5. To create new records based on the template, follow these steps:

   a) Select **File, New** from the Polaris Shortcut Bar to display the New dialog box.

   b) Select **Course Reserve Record** in the Objects list.

   The New dialog box expands with the existing templates in the Choose Template list.

   c) Select **Existing Template**.
   The templates become available for selection.

   d) Select your template in the Choose Template list, and click **OK**.
   The template workform appears.

   > **Note:**
   > If you are setting up many similar course reserve records, you can designate an existing template as the default course reserve template for the session. Select the template, and select (check) **Make session default**. For subsequent new course reserve records, select **Use Default Template**. To remove the session default designation, select **Clear session default**.

   e) Edit the workform as necessary, then select **File, Save** to save the record.

   > **Note:**
   > You can also use the Find Tool to search for an existing template. Select **Cataloging** (or **Patron Services**), **Templates**, **Course Reserve**. Right-click the template in the results list. From the context menu, you can open the template, or select **Create** to create a new course reserve record based on the selected template.

Placing Items on Reserve

You can reserve items in the library's collection, temporary items such as photocopies, or items provided by the course instructor. When you place an item on reserve, you can assign circulation settings to the item that are different from those that apply when the item is part of the library's ordinary circulating (non-reserve) collection. The same item can be placed on reserve for more than one course, but the same reserve circulation settings, such as the loan period and fine rate, apply to the item regardless of the course for which it is reserved. If you take an item off reserve for all courses, the primary item settings control the item record again.

Any item to be placed on reserve needs a corresponding item record, even if that record is only temporary. Items from the library's collection most likely already have item records, linked to corresponding bibliographic records. Some materials, such as those provided by an instructor, may not have item or bibliographic records in the library database. For more information about placing these materials on reserve, see "Place uncataloged material on reserve" on page 317.

Reserve Item Records

Polaris stores information about a reserve item in a reserve item "record," which is a special view of the item record and is linked to a course reserve record.

You can edit reserve circulation settings in the reserve item view of the item record:

- **Reserve Holding Detail (Assigned branch, Assigned collection, Shelf location, Loan period code, Fine code, Renewal limit,** and **Holdable)** - These settings can be different from those assigned in the primary item record.
- **Copy Owner** - Select **Library Copy** or **Instructor Copy** to indicate who owns the item.
- **Limited to Library Use** - Select this option to indicate that the item should not leave the library. At check-out, a message informs staff that the item should stay in the library.
- **Requires full cataloging** - Select this option to indicate that the primary item record and bibliographic record are incomplete. You might flag the reserve item with this option if you create a reserve item on-the-fly. See "Place uncataloged material on reserve" on page 317.
- **Purchase** - Select this option to indicate that the library needs to purchase additional copies of the item, or purchase its own copies of an instructor-owned item. This setting is informational only, and does not start any automatic processing.

- **Action when done** - Select **Discard**, **Return to collection**, or **Return to owner** to indicate what should happen to the item when it is taken off reserve. If you select **Discard** or **Return to owner**, you can also select **Autodelete** to have the primary item record and associated bibliographic record automatically deleted when the item is taken off reserve. You may want to select this option when material (such as photocopies) was specifically created for the reserve, and will be discarded when it is taken off reserve. See "Taking Items Off Reserve" on page 323.
- **Copyright** - Settings:
  - **None** - Select this option if the reserve item is not a photocopy.
  - **CCG** (Compliance with copyright guidelines) - Use this option for photocopied journal articles if the article is dated within the last five years, *and* your library does not own the journal title, *and* this is the fifth or fewer request made for this item within the current calendar year.
  - **CCL** (Compliance with copyright law) - Use this option for all other photocopies; for example, if the article is older than five years, *or* your library owns the journal title, *or* this is the sixth or greater request within the calendar year and your library is paying royalties to the Copyright Clearance Center or a document delivery vendor.
  - Fee information - You can select **Fee Required** or **Fee Paid**, and specify the amount of the fee.
- **Note field -** You can enter notes specifically related to the reserve item.
- **Linked courses** - This area shows information about the courses with which the reserved item is associated. You can right-click a course in the list to open the course reserve record or take other actions regarding the item's status in regard to the course. For each course, an item's reserve status can be **On Reserve**, **Not Reserved,** or **Permanent**:
  - **On Reserve** - The item is on active reserve for the course.
  - **Not Reserved** - The item is not currently on reserve for the course, but may be placed on reserve again in the future.
  - **Permanent** - Some items are placed on permanent reserve and are never taken off. Materials for a course that is taught each semester, and frequently used or valuable reference books may be treated this way.

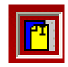
  An item may be on reserve for one course and not reserved for another.

You can place items on reserve with any circulation status other than Withdrawn or Lost. If the item's status is In, you can select any reserve status for the item in relation to the course (On Reserve, Permanent, or Not Reserved). Items with circulation statuses other than In automatically receive a reserve status of Not Reserved. If an item is Out when you place it on reserve, you can flag the item with a library-assigned block, then activate the reserve when the item is checked in.

Place items on reserve from a course reserve record

If you have a stack of items already pulled from the shelves, ready to place on reserve for one course, this method may be the most efficient. Follow these steps to place items on reserve by linking to the item records from an open course reserve record.

1. Select **Cataloging**, **Course Reserve Records** (or **Patron Services**, **Course Reserve Records**) to search for the course reserve record with the Find Tool, and open the record from the results list.

2. Select **View, Items** or click  to display the Reserve Items view.

3. Click the Add Items icon  above the Reserve items list.

   The Add Items dialog box appears.

4. Specify an item or items to add by one of the following methods:
   - Scan or type the item barcode in the **Items** box.
   - Click **Find** to open a Find Tool, and search for and select the item record.

   The Items list displays the items you selected.

Tip:
If an item in the list is a serial, the serial designation (enumeration and chronology) is added to the title. You may need to expand the title column to see the designation.

5. To set circulation values for the reserve item from a template, follow these steps:

   Note:
   You can set or edit circulation values after the reserve item is added to the course. See step 7.

   a) Click **Find** in the Template area of the dialog box.

   The Find Tool appears.

   b) Search for and select a reserve item template.

   For more information about reserve item templates, see "Create a reserve item template" on page 320.

6. Click **OK**.

   The Add Item dialog box closes. The Reserve items list in the Course Reserve workform displays the linked item. The status bar indicates that the link has been created.

   In all the item records you placed on reserve, you can see the Reserve Item settings by selecting **View**, **Reserve**. For more information about reserve item settings, see "Reserve Item Records" on page 311.

7. To set or edit circulation values for a reserve item, follow these steps:

   a) Double-click the item in the Reserve items list on the Course Reserve workform.

      The Reserves view of the item record appears.

   b) Set the circulation values in the Reserve Holding Detail section of the Reserves view, and click **File**, **Save**.

Related Information

- **Uncataloged material** - You can place temporary or instructor-owned items on reserve by creating item and bibliographic records on-the-fly from the course reserve record. See “Place uncataloged material on reserve” on page 317.
- **Editing reserve item settings** - You can edit the **Start Date**, **End Date**, and **Notes**, after the item has been placed on reserve. In the Reserve Items view of the course reserve record, right-click the item and select **Edit Linked Information** from the context menu (or select the item and click ). In the Reserve view of the item record, right-click the course and select **Edit Linked Information** from the context menu.
- **Transferring items** - You can transfer reserve items from one course to another. See “Transfer a reserve item to a different course” on page 319.
- **Inactive Courses** - If the course status is Inactive, all items added to the course reserve record have a status of Not Reserved, regardless of the default or template setting for the reserve item status. If the course status changes to Active, you can edit the status of the reserved items to On Reserve. Select the item in the Reserve Items view of the course reserve record and click  .
- **Repeated courses** - If the same course is taught every term, you can create a course reserve record for each term, and transfer the items from one course to the next at the end of the term. See “Transfer a reserve item to a different course” on page 319. Another method is to use a single course record, changing the Term/Year setting at the end of each term. When you change the Term/Year setting, the Start Dates and End Dates are automatically updated for all the reserved items for the course.

  Note:
  If a course is taught frequently, but not necessarily every term, you can set the course reserve status to Inactive at the end of the term. The status of the reserved items for the course automatically changes to Not Reserved. When the course is taught again, you can reactivate the course and the reserve items.

- **Opening reserve item records from course reserve search results** - In the Find Tool results list, right-click the course reserve record and select **Links, Existing, Items**. The associated records open.
- **Open course reserve records from reserve item records** - In the item record, select **Links, Course Reserves**.

Place cataloged items on reserve from an item record

Follow these steps to place cataloged materials on reserve by working from the Item Record workform.

Tip:
Right-click the item in the Find Tool results list, and select **Add to Course Reserve** from the context menu.

1. Select **Cataloging, Item Records** to search for the item record with the Find Tool, and open the record from the results list.
2. Select **Tools, Add to Course Reserve Record.**

   The Add to Course Reserve dialog box appears.
3. Specify the course reserve record for which the item is to be placed on reserve, by following these steps:

   a) On the Course & Item tabbed page, click **Find Course** to display the Polaris Find Tool.

   b) Search for the course reserve record.

   c) Right-click the course reserve record in the results list, and choose **Select** from the context menu.

   The Find Tool closes, and information from the selected course reserve record fills the course fields in the Add to Course Reserve dialog box.
4. Specify the circulation settings for the reserve item using one of these methods:
   - On the Course & Item tabbed page, specify the circulation information in the Reserve circulation section of the dialog box. For more information about these settings, see "Reserve Item Records" on page 311.
   - If you want to use a reserve item template to set the circulation values in the reserve item record, click **Find Template** to display the Polaris Find Tool and search for the template. For more information about reserve item templates, see "Create a reserve item template" on page 320.
5. Select the **Disposition** tab in the Add to Course Reserve dialog box, and edit the disposition settings as needed. For more information about these settings, see "Reserve Item Records" on page 311.

   You can use the **Note** field for information about specific chapters or pages required for a particular course.
6. Click **OK** to submit your settings.

   The status bar indicates that the link has been created, and the selected course is displayed in the Linked Courses list on the Reserves view of the item record.
7. To edit the circulation settings for the reserve item, select **View, Reserve** or click  on the Item Record workform.

   For more information about reserve item settings, see "Reserve Item Records" on page 311.

Related Information

- **Searching for reserve item records** - Select **Cataloging**, **Reserve Item Records** to search for a reserve item record (for example, by title). You can open a reserve item record from the results list. The results list also includes the course name, course number, reserve status, and instructor. If a reserve item is linked to more than one course, the Course Name field indicates **Multiple** and the other course fields are blank. Right-click the reserve item in the results list, and select **Links** from the context menu to access the associated course reserve records.

  Note:
  You can limit searches for reserve item records by assigned branch, in addition to other options. The assigned branch is the assigned branch for the reserve item, which may differ from the assigned branch for the item when it is not on reserve.

- **Editing reserve item settings for a particular course** - You can edit the **Start Date**, **End Date**, **a**nd **Note** for an item as it relates to a particular course, after the item has been placed on reserve. In the Reserve Items view of the course reserve record, right-click the item and select **Edit Linked Information** from the context menu. In the Reserve view of the item record, right-click the course and select **Edit Linked Information** from the context menu. A dialog box is displayed where you can edit the start date, end date, and note.

  Note:
  If the course reserve record's Term/Year setting is changed, the reserved item's Start Date and End Date are automatically updated. Edit the reserve item's dates if you need to set values different from the new course dates.

Place multiple cataloged items on reserve from a record set

If all the items to be reserved have item records, you can follow these steps to place multiple items on reserve for a course.

> **Note:**
> For information about creating temporary item records for instructor-owned materials, see "Place uncataloged material on reserve" on page 317.

Tip:
You can place multiple cataloged items on reserve from a Find Tool results list. Right-click the items in the list and select **Add to Course Reserve** from the context menu.

1. Create a record set of the item records you want to place on reserve. See "Using Cataloging Record Sets" in the *Polaris Cataloging Guide 4.1R2*.
2. In the Record Set workform, select **Edit**, **Select All**.

   All the items in the item list for the record set are highlighted.
3. Right-click in the item list, and select **Add to Course Reserve** from the context menu.

   The Add to Course Reserve Record dialog box appears.
4. Specify the course reserve record to which you want to link these items, and the reserve circulation settings for the items. For details, see "Place cataloged items on reserve from an item record" on page 315.
5. Click **OK** to submit your settings.

   The status bar indicates that the links have been created, and the selected course is displayed in the Linked Courses list on the Reserves view of each item record in the record set.

Place uncataloged material on reserve

You may need to place an item on reserve that is not cataloged in the Polaris database, such as material supplied by an instructor. When you place an uncataloged item on reserve, you create minimal level item and bibliographic records on-the-fly, according to an on-the-fly item record template you set up in advance. Follow these steps to place uncataloged material on reserve.

> **Important:**
> You need an item record template named **Reserve on the fly** to create reserve items on the fly for uncataloged materials. Do step 1 of the procedure below to create the template.

1. (One time only.) Create the Reserve on the fly item template by following these steps:

   a) Select **File, New** from the Polaris Shortcut Bar to display the New dialog box.

   b) Select **Item Template** from the Objects list, and click **OK**.

   The Item Template workform appears.

c) Type **Reserve on the fly** in the **Name** box.

> **Important:**
> Type the name **Reserve on the fly** exactly as it appears here.

d) Select *your branch* (not yourself) in the **Template owner** box.

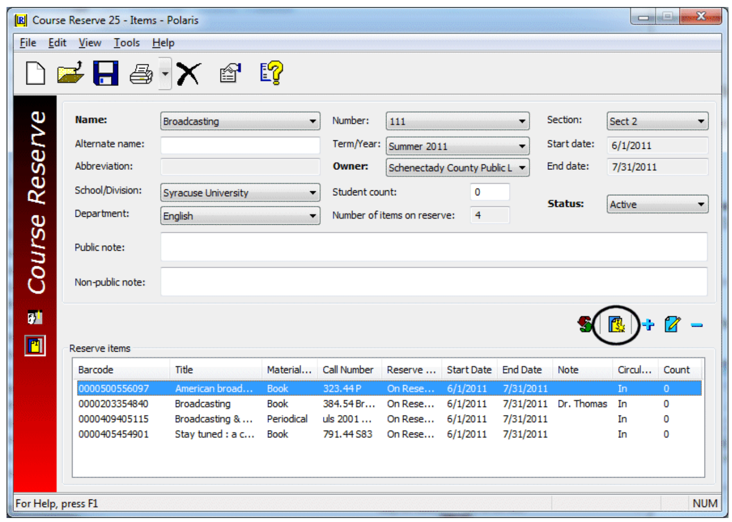
e) Set circulation, location, and request parameters as you would for a normal item.

f) Select **File, Save** to save the template.

2. Select **Cataloging** (or **Patron Services**), **Course Reserve Records** to search for the course reserve record with the Find Tool, and open the record from the results list.

3. Select **View, Reserve Items** or click  to display the Items view.

4. Select the Create Item icon  above the Reserve items list.



The Brief Item Entry dialog box is displayed.

5. Specify the following information on the Brief Item Entry dialog box:
   - **Item barcode**
   - **Title**
   - **Author** (optional)
   - **Call number**
   - Any free text block, if appropriate
   - Circulation settings (**Material Code, Fine Period, Loan Period, Collection**)
   - **Set OTF Block** - Leave this box unchecked. Typically, when a previously uncataloged OTF item is checked in, a block message notifies you that it requires full cataloging. You can override the block to check in the item and allow it to circulate. However, you will be blocked at circulation until the item is fully cataloged, or you save the item record and choose to stop blocking the item. For reserve items, the OTF block is disabled by default (the **Set OTF Block** option is not checked) for your convenience.

6. Click **OK**.

   The temporary bibliographic and item records are created, and the Add to Course Reserve dialog box is displayed.

7. If you want to use a reserve item template to set values for the new reserve item, follow these steps:

   a) Click **Find Template** in the Reserve Circulation area of the dialog box.

   The Find Tool appears.

   b) Search for and select a reserve item template.

   Note:
   For more information about reserve item templates, see "Create a reserve item template" on page 320.

8. Edit the reserve circulation settings for the item, if necessary.

9. Select the **Disposition** tab in the Add to Course Reserve dialog box to edit disposition settings.

10. Click **OK**.

    The Add to Course Reserve dialog box closes. The Reserve items list in the Course Reserve workform displays the linked item, and the status bar indicates that the link has been created.

Transfer a reserve item to a different course

Follow these steps to transfer an existing reserve item from one course to another. The item's circulation status must be In.

1. Select **Cataloging** (or **Patron Services**), **Course Reserve Records** to search for the course from which you want to transfer the item.

2. Select **View, Items** or click  to display the Items view.

3. In the Reserve items list, right-click the item you want to transfer, and select **Transfer to another Course Reserve** from the context menu.

   The Find Tool appears.

4. Search for and select the course reserve record to which you want to transfer the item.

   The item is removed from the original course reserve record, and the record closes. The item is displayed in the Reserve items list in the current course reserve record.

Create a reserve item template

Templates can simplify the creation of new reserve item records. Follow these steps to create a reserve item template.

> **Note:**
> You need a special **Reserve on the fly** template for creating reserve item records for temporary or instructor-owned materials. See "Place uncataloged material on reserve" on page 317.

1. Select **File, New** from the Polaris Shortcut Bar.

   The New dialog box appears.

2. Select **Reserve Item Template** in the Objects list, and click **OK**.

   The template workform appears.

3. Fill in the workform, as necessary. See "Reserve Item Records" on page 311.

   > **Note:**
   > **Start Date** and **End Date** values are optional. You might specify values in these fields if the reserve period for items that use this template is different from the start and end dates for a course. If you leave these values blank in both the template and the reserve item record, the course start date and end date define the reserve period for the item. In any case, you can edit the dates in the reserve item record. The reserve period for an item can be different for each course to which it is linked.

4. Select **File, Save** to save the template.

   The status bar indicates that the template was saved successfully.

   > **Note:**
   > You can use the Find Tool to search for and open an existing template. Select **Cataloging**, **Templates**, **Reserve item**.

Related Information

Permanent Reserve templates - If you have many items on permanent reserve, you may find it useful to create a separate template for these items. Specify any preferred settings in the template, and set the status to **Permanent Reserve**.

Circulating Reserved Items

Reserve items may circulate like any other items, but their loan period and fine rates are generally adjusted. For example, a book that normally circulates for two weeks might be limited to three hours or overnight when placed on reserve. The Reserve Item view of the item record shows the reserve circulation settings.

Reserve Item Check-Out

You check out reserve items following the same general procedures as for any other check-out operation (see "Check-Out and Renewal" on page 89). When a reserve item is checked out, the transaction is recorded in the circulation counters in the Reserve Item view of the item record, as well as the circulation counters in the primary item record.

The following special situations may apply to reserve items:

- **An item is on reserve for more than one course** - When you check out an item that is on reserve for more than one course, a dialog box displays. Select the course for which the item is being checked out, and click **OK**. It is possible to choose **No course**. In this case, the reserve item circulation settings still govern the due date calculation, and the item counts toward the total number of reserved items a patron may check out, but the transaction is not added to the reserve item's circulation statistics.
- **An item is limited to library use** - If the reserve item is limited to in-library use only, a message warns you that the item should not leave the library.
- **Patron block on reserve items** - A block message may appear if the patron has exceeded the limit on the number of reserved items that can be checked out. This limit is set in Polaris Administration. See "Defining Loan and Request Limit Blocks" in the *Polaris Patron Services Administration Guide 4.1R2*.

Reserve Item Check-In

You check in reserve items following the same general procedures as for any other check-in operation. See "Check-In" on page 122. During check-in, if an item has a reserve status of **On Reserve** or **Permanent Reserve**, a message informs you what course the item is reserved for, so that you can put it aside for proper shelving.

Offline Circulation for Reserve Items

For offline circulation, the following special situations apply to reserve items:

- **Circulation statistics** - If a reserve item is on reserve for more than one course, the check-out is recorded with the first course to which the item is linked. A message is written to the log file during upload.
- **An item is limited to library use** - When a reserve item is checked out offline, but the item is limited to in-library use only, a message is written to the log file during upload.
- **Patron block on reserve items** - When a reserve item is checked out offline, but the patron has exceeded the limit on the number of reserved items that can be checked out, a message is written to the log file during upload.
- **Check-in** - When a reserve item is checked in using offline mode, a message is written to the log file during upload that identifies the item as a reserve item.

Self-Check Circulation for Reserve Items

For self-check circulation, the following special situations apply to reserve items:

- **An item is linked to more than one course** - If a reserve item is on reserve for more than one course, the check-out is blocked. A message refers the patron to the staff circulation desk for check-out.
- **An item is limited to library use** - When a reserve item is limited to in-library use only, the check-out is blocked.
- **Patron block on reserve items** - If the patron has exceeded the limit on the number of reserved items that can be checked out, the check-out is blocked.

Taking Items Off Reserve

You can take items off reserve in two ways. For items that frequently return to reserve, you may want to *deactivate* the item. When you deactivate an item from all courses, the primary item circulation settings are restored, but the reserve item record settings are stored for use when the item is placed on reserve again. The item record is still linked to the course reserve record, but the reserve status changes to Not Reserved. See “Deactivate a reserve item” on page 323.

Important:
As long as the item is on reserve *for at least one course*, the reserve item circulation settings remain in effect.

For items that are not expected to return to reserve, you may want to *remove* the items from reserve. When you remove an item from reserve, the primary item circulation settings are restored (if the item belongs to the library’s collection), and the reserve item settings are completely cleared. The link between the course reserve record and the item record is broken. See “Remove an item from reserve” on page 324.

When items are removed from reserve for all courses, you dispose of the physical item according to the settings in the reserve item record. If the item belongs to the library, it is either returned to the library’s circulating (non-reserve) collection, or discarded. If the item belongs to an instructor, it is either returned to the instructor, or discarded. If the **Auto-delete** option is set in the reserve item record, item and bibliographic records are automatically deleted when an item is taken off reserve to be discarded or returned to the owner.

Deactivate a reserve item

You can deactivate items that frequently go on and off reserve. When you deactivate a reserve item, the item is taken off reserve for a course, but the reserve item settings are stored so they can be readily used again. Use one of the following methods to deactivate a reserve item:

Note:
To deactivate a reserve item, the item’s reserve status must be On Reserve, and the circulation status must be In (except ILL items, which cannot have a status of In).

- From the Course Reserve record, Items view:

  Right-click the On Reserve item in the Reserve items list, and select **Deactivate** from the context menu (or click .)

- From the item record, Reserves view:

  In the Linked courses list, right-click the course for which you want to deactivate the item, and select **Deactivate** from the context menu.

The Start Date and End Date values for the reserve item in effect for this course are removed, and the reserve status changes to Not Reserved. If the item is not on reserve for any other course, the primary circulation settings become active. If the item is not on reserve for any other course, the assigned branch for the reserved item is different from the primary assigned branch, and the item should be returned to the library collection, Polaris displays a message that the item should be returned to its primary branch. The primary circulation settings become active, and the primary circulation status changes to In Transit.

Related Information

Reactivate an item - From the Course Reserve record (Items view), right-click the Not Reserved item in the Reserve items list, and select **Reactivate** from the context menu (or select the item and click  .) From the item record (Reserves view), in the Linked courses list, right-click the course for which you want to reactivate the item, and select **Reactivate** from the context menu. The course must be Active. The reserve period for the item is set to the course reserve record start and end dates.

Remove an item from reserve

Use this method to take an item off reserve when you do not expect that the item will be placed on reserve again. When you use this method, the reserve item settings are completely cleared and the link to the course reserve record is broken. Follow these steps to remove an item from reserve.

- From the Course Reserve record, Items view:

  Right-click the item in the Reserve items list, and select **Remove from Course Reserve** from the context menu (or select the item and click ).

- From the Item record, Reserves view:

  In the Linked courses list, right-click the course from which you want to remove the item, and select **Remove from Course Reserve** from the context menu.

If the reserve item was linked to only one course reserve record, the primary item circulation parameters are restored, and the link between the item and course reserve records is removed. If the item was linked to more than one course reserve record, the link between the selected course and the item is removed, but the reserve item circulation parameters remain in effect for the other linked courses.

If the reserve item has either **Discard** or **Return to Owner** selected, and **Auto-delete** was checked, the item and bibliographic records are deleted.

Note:
If the reserve item was linked to more than one course, or if the circulation status is other than In, the item and bibliographic records are not deleted even if the Auto-delete option was checked. Also, if more than one item is linked to the bibliographic record, the bibliographic record is not deleted.

Related Information

Manually deleting item records with links to course reserves - When you try to delete an item record that is linked to at least one course reserve record, a message informs you of the link. You can break the link and continue to delete the item.

Sending Course Reserve Notices

You can send an e-mail or print notice to primary and alternate course instructors, summarizing circulation statistics for their course reserve materials at the end of each semester. The notice also provides a way for instructors to respond and indicate items to be removed or added.

Notice Content

The notice reports all or selected active courses for a branch. (The report content is the same as the Circulation report **Reserves Statistics by Course**. See “PAC Reports” in the *Polaris Basics Guide 4.1R2*.) Both the report and the notice deal with active courses only, and contain circulation statistics for reserve items with a reserve status of On Reserve or Permanent Reserve. (They do not include reserve item records with a status of Not Reserved.) If an item is on reserve for more than one course, the statistics shown in the report are for the selected course only.

Note:
Polaris recommends that you allow the Course Reserve status to remain Active for a time after the end of the semester to allow reporting and notification from the staff client and the instructor’s PAC patron account.

Detailed content of the notice and report includes the following information:

- List of items on reserve for each course
- Course name (primary sort), including course number if available
- Reserve Start and End date
- Author (secondary sort). If there are multiple authors, only the first is included. If no author is listed, the entry is placed at the end of the report.
- Title (tertiary sort)
- Call number, including Volume and Copy if any
- Barcode
- Item material type (labeled **Format** in the report)
- Owner - Instructor copy or Library copy
- Circulation (sum of all check-outs and renewals) per title
- Patrons - Total number of unique patrons transacting per title
- Total number of items on reserve per course
- Grand total check outs for all titles per course

E-mail notices include the following additional elements:

- **Subject** - **Course Reserve Summary**. This text can be edited in Polaris Language Editor.
- **Reply-to address** - Can be specified for each branch in the Polaris Language Editor. If none is specified, the notice uses the default reply-to address set in Polaris Administration (**Notification options** parameter; see “Set up notification methods, e-mail options, and export location” in the *Polaris Patron Services Administration Guide 4.1R2*).
- **Footer** - Text as defined in Polaris Administration (**Notification options** parameter; see “Set up notification methods, e-mail options, and export location” in the *Polaris Patron Services Administration Guide 4.1R2*).
- **Default message** - **Attached are your current course reserve statistics. Please note any additions or deletions and return this notice to the library.** The text can be customized in Polaris Language Editor.

Printed notices include the following additional elements:

- **Header** - **Course Reserve Summary**. This text can be edited in Polaris Language Editor.
- **Default message** - **Attached are your current course reserve statistics. Please note any additions or deletions and return this notice to the library.** The text can be customized in Polaris Language Editor.

Note:
The Polaris Language Editor (WebAdmin) is available on your library’s Web server. You must have the system-level System Administration permission **WebAdmin access: Allow** to use this application. For more information about using the Polaris Language Editor, see online Help for the application.

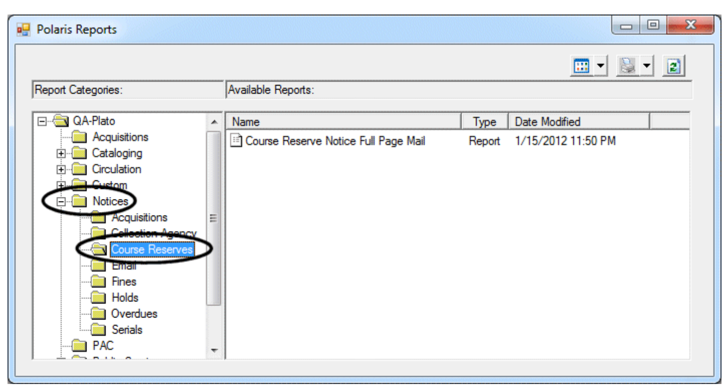
Send course reserve notices

Follow these steps to send course reserve notices to instructors.

1. Select **Utilities, Reports and Notices** from the Polaris Shortcut Bar.

   The Polaris Reports window opens.

2. Select **Notices, Course Reserves**.

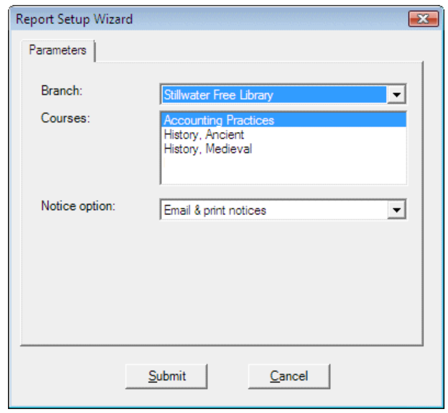


3. Select **Course Reserve Notice**.

   The Report Setup Wizard dialog box opens.

4. Select a branch (the owner of the course reserve record).

   The **Courses** list displays courses where the selected branch is the owner, the Course Reserve record status is Active, at least one instructor record is linked to the Course Reserve record, and at least one reserve item record with a status of Active or Permanent Reserve is linked to the Course Reserve record.



5. Select a course or courses.

6. Select a notice option:
   - **Email & print notices** - After overnight processing, e-mail notices will be sent to instructors associated with active courses whose patron records include at least a primary e-mail address. Print notices are produced for those instructors without e-mail addresses.
   - **Print notices** - The notices are addressed to the address specified in the instructor's patron record field **Address for notices and bills**.

7. Click **Submit**.

   E-mail notices are placed in the queue. Print notices appear as .pdf files in Adobe Reader. Click the Adobe Reader print icon to print the notices.

Viewing course reserve statistics from the PAC

If the patron is a primary or alternate instructor for at least one Active course, he or she can log on to the patron account in Polaris PowerPAC and click the **Courses** option to see course reserve statistics for the Active courses linked to the instructor's patron record. To receive a copy of the report by e-mail, the instructor clicks **Send me this report** at the bottom of the page.

Related Information

- **Reports** - See "PAC Reports" in the *Polaris Basics Guide 4.1R2*.

Reports for Course Reserves

Several course reserve reports help you manage course reserves. To access the course reserve reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Circulation** in the Polaris Reports dialog box.

- For information on generating reports, see "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*.
- For detailed descriptions of specific Course Reserves reports, see "PAC Reports" in the *Polaris Basics Guide 4.1R2*.

Patron Services/Circulation Shortcut Keys

This appendix contains charts with the shortcuts you can use with Polaris patron services and circulation workflows. The cards are designed to be photocopied, trimmed, and put into transparent sleeves that attach to the computer monitor. You can order these sleeves from vendors such as Axzo Press at the following Web site:

http://www.axzopress.com/Products/Products_FlipCARDS.aspx

General

Workform Help	F1
Find Tool - Patron Registration workform (online only)	F7
or from workform	CTRL+O
Find Tool - Patron Status workform	F6
or from workform	CTRL+O
New workform	CTRL+N
Close workform	ALT+F4
Save record	CTRL+S
Delete record	CTRL+D
Cycle from one workform view to the next	CTRL+TAB
Open the Tools Options dialog	CTRL+T
Switch between patron registration/patron status	F9
Properties	F8

Print

Print current view	CTRL+P
Print current list view	CTRL+SHIFT+P

Record Sets

New record set	CTRL+N
Find Tool - Record Set workform	CTRL+O
Load all records in Find Tool results set	CTRL+SHIFT+A
Add member by searching	CTRL+E
Add member by scanning	CTRL+K
Bulk change	CTRL+B
Save record set	CTRL+S
Close workform	ALT+F4
Delete record set	CTRL+D
Properties	F8

Check Out

Open Check Out workform	F3
Find patron	CTRL+R
Previous patron barcode	F4
Find item	CTRL+I
Find bib	CTRL+B
Create quick-circ item	CTRL+Q
Place a hold	CTRL+H
Special loan	ALT+S
Reset due date	CTRL+ALT+D
Patron Registration workform	CTRL+F9
Patron Status General view	ALT+G
Patron Status Items Out view	ALT+O
Patron Status Account view	ALT+A
Patron Status Claims view	ALT+C
Patron Status Holds view	ALT+H
Patron Status Reader Services view	ALT+D
Patron Status Associations view	ALT+W
Patron Status Notes view	ALT+N
Express-register patron	CTRL+G
RFID check-out	F9
Smart card check-out	CTRL+ALT+S

Check In

Open Check In workform	F2
Find patron	CTRL+R
Place a hold	CTRL+H
RFID check-in	F9
Change an item's circ status or shelf location	CTRL+M
Change an item's barcode	CTRL+B

Check In - Inventory

Load barcode file	CTRL+ALT+I

Patron Registration - All

Check out	CTRL+F9
Place hold	CTRL+H

Patron Status - All

Check out	CTRL+F9
Place hold	CTRL+H

Patron Status - Items Out

Renew	CTRL+R
Renew All	CTRL+A
Special Renew	CTRL+E
Make Claim	CTRL+M
Declare Lost	CTRL+L
Print items out list to a receipt printer	CTRL+ALT+P
Place a hold	CTRL+H
View an item's notice history	ALT+N

Patron Status - Account

Charge	CTRL+C
Pay	CTRL+Y
Pay All	CTRL+L
Waive	CTRL+W
Waive All	CTRL+V
Deposit	CTRL+I
Return	CTRL+R
Forfeit	CTRL+F
Credit (from deposit)	CTRL+E
Create credit	CTRL+B
Refund credit	CTRL+G
Transaction Summary	CTRL+T
View an item's notice history	ALT+N

Patron Status - Holds

Add to Group	CTRL+G
Remove from Group	CTRL+R

Patron Status - Associations

Add	CTRL+A
Edit	CTRL+E
Delete	CTRL+D

Patron Status - Claims

Reset total claims	ALT+C

Request Manager

Close workform	CTRL+F4
Refresh	F5

Hold Request Shortcuts

New Request	CTRL+N
Convert to ILL	CTRL+I
Deny Hold	CTRL+R
Cancel	CTRL+L
Reactivate	CTRL+A
Delete	CTRL+D
Properties	F8

Hold Request Workform

New Request (new patron, new title)	CTRL+N
New Request (new patron, same title)	CTRL+G
New Request (same patron, new title)	CTRL+H
Save	CTRL+S
Properties	F8
Refresh	F5
Delete	CTRL+D
Convert to ILL	CTRL+I
Deny Hold	CTRL+R
Cancel Hold	CTRL+L
Reactivate	CTRL+A
Fill Request Now	CTRL+F
Options	CTRL+T

Multi-Request view

Add patron	CTRL+R
Remove patron	CTRL+E
Add title	CTRL+T
Remove title	CTRL+M

Holds Queue Workform

Save	**CTRL+S**
Refresh	**F5**
New Request	**CTRL+H**
Move Up	**CTRL+U**
Move Down	**CTRL+W**
Move Top	**CTRL+T**

Course Reserves - Instructors

Add Instructor	**CTRL+A**
Edit Instructor	**CTRL+E**
Remove Instructor	**CTRL+R**

Course Reserves - Reserve Items

Add Item	**CTRL+A**
Edit Item	**CTRL+E**
Remove Item	**CTRL+R**

Receive Shipment

Open workform	**ALT+A+S**
Open Manage Item Record dialog box	**CTRL+M**

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