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NAVIGATION IN POLARIS

- Menu Bar
- Drop Down Menus/Icons/Shortcut Keys
- Function Keys
- Linking in Polaris
- Permission Blocks

Menu Bar

When you first logon to Polaris, you will know that you have been successful in connecting to the database by the Menu Bar. In the top left corner of your desktop, it should state the Polaris version, your logon, and your default location.

Navigation in Polaris can be accomplished in four ways: drop down menus, icons, shortcut keys and function keys. All four options are available for each logon.

Drop Down Menus (Shortcut Bar)

Clicking on each title in the menu bar presents a drop-down menu to access functions in each subsystem such as Acquisitions, Serials, Cataloging or Circulation. Whether or not you have access to all of these subsystems is based on your privilege level given by your director.

Icons

Another way to access the Polaris subsystems is to click on the corresponding icons in the tool bar. Hovering over each icon brings up a tool tip. The tool tip shows you what
function that icon accesses when clicked. Clicking on a round marble “slides open” the subsystem’s menu to present the related icons.

Shortcut Keys

For users familiar with Windows shortcuts, many are built in to Polaris. Numerous CTRL and ALT combinations can open menus and workforms in Polaris. Keyboard shortcut cheat sheets for patron services and circulation can be found in Appendix A of this manual.

Function Keys

Polaris also utilizes function keys. You will find these keys located at the top of your keyboard. Most standard computer keyboards contain F1-F12. Polaris utilizes function keys to open menus and workforms. Function Keys are also listed in Appendix A.

Linking in Polaris

One of the fastest ways to move around in Polaris is by linking from one record to another either from a result set in the Find Tool – right-click and choose Links from the context menu; or from a workform – go to Links in the Shortcut Bar. You can link to other workforms or perform specific functions without additional keystrokes.

In the example below, a search was performed for the title, “The Cat and the Hat”. By right clicking on the title, selecting Links, you can quickly link to more information about this title such as the items attached or the hold queue.
If you are in a workform such as the bibliographic record, you can go to Links in the menu bar.

Permission Blocks

You may encounter a message that says that you do not have permission to complete a certain task. When given the option to Override, you will need someone with a higher permission to enter their login and password in the appropriate fields and then click OK. If no Override button is available, your library is unable to perform the task in this subsystem.
The SHARE’s Administrative Services Team, working in conjunction with the director of each SHARE library, grants permissions to each logon. If this is a permission that you frequently need, write down the exact wording of the permission from the pop-up message to give to SHARE’s Administrative Services Team.
FIND TOOL

- Types of Searches
- Find Tool Tabs
- Searching for Bibliographic Records
- Searching for Item Records
- Setting User Defaults
- Wildcard Characters
- Search Results

Types of Searches

The Find Tool has the same format in all Polaris subsystems, but with different options/indexes in the drop-down menus. It allows users to do everything from basic to advanced searching. The three most common searches are: patron searches, bibliographic record searches, and item searches. Patron searches will be discussed in the patron manual.

Bibliographic Record and Item Searches

From anywhere in Polaris, you can use the following shortcut keys to bring up the Find Tool to search for cataloging records.

- Bibliographic Records – F12
- Item Records – CTRL+ALT+ F9

Or if you prefer, click on Cataloging, Bibliographic Records or Cataloging, Item Records in the drop down menu.

Or if you prefer, click on the blue cataloging marble, then either or .
Find Tool Tabs

Each **Find Tool** window has the following tabs:

![Tool Tabs](image)

### General Tab

The General Tab contains the following options for searching:

- **Object** – default object is selected but this can be changed to any object in the list.
- **Search By** – access point or index
- **Type** – type of search to perform
- **Sort By** – order of the search results
- **For** – enter your search string
- **Limit By** – add a narrowing criterion, if available – some limits allow multiple values to be selected.

### Settings Tab

The Settings Tab contains options for the creation of Record Sets, which is discussed later in this manual. You can also raise the value of the retrieval limit on this screen. This is very useful when the search results go over that value. Example: Retrieving all barcoded items in your library.
**Scoping Tab**

You should begin your search on the general tab, and then narrow the search further by using the scoping tab.

The scoping tab includes operators, qualifiers and values. You add the criteria to your search by clicking the [Add] button; make your selection; and then click [Search]. A qualifier can be changed by highlighting the line in the Current Criteria box, changing it on the left, and then clicking the [Update] button. To remove criteria, highlight the line and then click [Remove].

**Branches and Collections Tabs**

Searches can be narrowed further by opening the branches and/or collection tabs and making additional selections. Since SHARE is such a large consortium, scoping to your branch and/or collections may be a desirable outcome. However, this selection is not available to be saved in the user defaults.

In both the branches and collections tabs, click the [Unselect All] to clear all checkmarks. The SHARE lists are very long; it will take a moment to clear all checkmarks.
**Databases Tab**

The Database Tab contains external databases that SHARE can search. Currently, other than the PAC, we are not utilizing this tab.
Additional Find Tool Searches

On the **General Tab**, there are 3 other options that you can utilize for a search:

- **Power** – gives the staff the ability to use CCL (Common Command Language) to create a search.
- **SQL** – if permissions are given, allows staff to create, save and run SQL queries within the **Find Tool**.
- **Count Only** – allows staff to get a quick count of records without displaying the results list – helpful for reporting purposes.

Searching for Bibliographic Records

After launching the bibliographic records search window, under the General Tab, in the drop down **Search By** menu, you can search for bibliographic records by a variety of fields. A few of the most popular would be title, author, subject, barcode and genre.
For bibliographic record searches, the type of search changes depending upon the field you have selected to search by. Some of the most common include (but there are others):

- Exact match (implicitly truncated)
- Exact match (explicitly truncated)
- Browse
- Keyword search
- Phrase search

**Exact Match (implicitly truncated)**

When using the exact match (implicitly truncated) type of search, your search results will display all records beginning with the characters entered in the *For* box, e.g., my title begins with... There is no need to insert an asterisk after the term; truncation is implied.

**Exact Match (explicitly truncated)**

When using the exact match (explicitly truncated) type of search, your search results will display only the records that exactly match the characters in the *For* box. If you enter an
When using the browse type of search, your search results will display the specified index headings beginning with entries that start with text in the For box (basically alphabetical). The browse search is Unicode compliant. Diacritics or special characters are accepted if they match the heading. Name indexes are searched in the last name, first name format. You do not have to enter a comma when searching for a name.

The browse mode will also allow you to SEE the different formats for a particular title. In the example below, “The Cat in the Hat” has a title count of 81. The “SEE” lines below the main title break the 81 titles into their respective formats.
Keyword Search

When using the keyword type of search, your search results will display the records that include the exact search term or terms in any order. There is an implied ‘and’ between each word entered as a search term. As you type, Polaris will offer autosuggestions that you would then be able to select, if needed.
Phrase Search

When using the phrase type of search, your search results will display the records that include multiple words in the exact order in which they were entered. As you type, Polaris will offer autosuggestions that you would then be able to select, if needed.

In the drop down Sort By menu, you can sort bibliographic records by a variety of sort options. A few of the most popular would be title, then author; author, then title; or publication date; then title.
In the drop down *Limit By* menu, you can limit your search results by a variety of limit options. A few of the most popular would be title, author, genre, target audience, or type of material. After selecting one of the options in the Limit By menu, the Value box displays options for that selection in the form of a drop down menu or a free-text field for entry.

![Bibliographic Records - Title Find Tool](image1)

**Searching for Item Records**

After launching the item records search window, under the General Tab, in the drop down *Search By* menu, you can search for item records by a variety of fields. A few of the most popular would be barcode, ISBN, genre, title or author.

![Item Records - Barcode Find Tool](image2)
For item record searches, the type of search changes depending upon the field you have selected to search by. Some of the most common include (but there are others):

- Exact match (implicitly truncated)
- Exact match (explicitly truncated)

**Exact Match (implicitly truncated)**

When using the exact match (implicitly truncated) type, your search results will display all records beginning with the characters entered in the *For* box, e.g., my title begins with…. There is no need to insert an asterisk after the term; truncation is implied.

**Exact Match (explicitly truncated)**

When using the exact match (explicitly truncated) type, your search results will display only the records that exactly match the characters in the *For* box. If you enter an asterisk after the search term(s), the results are the same as they would be on an implicitly truncated search. Explicitly truncated searches are helpful for one-word title searches.
In the drop down *Sort By* menu, you can sort item records by a variety of sort options. A few of the most popular would be title; title, then assigned branch; or assigned branch.
In the drop down Limit By menu, you can limit your search results by a variety of limit options. A few of the most popular would be title, author, genre, assigned branch, collection, or target audience. After selecting one of the options, the value drop down menu displays options for that selection or provides you with a free-text field for entry.

### Setting User Defaults

The General tab on the Find Tool defaults to settings customized by the individual user. Users may define custom search defaults on any General tab of each Find Tool.

To setup your search defaults, change the options in each of the drop down menus. Once your selections have been made for the general tab, go to Options > Save as User Default. The settings are linked to each username. You can make changes to the default settings at any time.

### Wildcard Characters

There are two valid wildcard characters in Polaris: the asterisk (*) and the question mark (?). Both wildcards will produce the same results. You can use a wildcard in keyword and exact match – implicitly truncated searches. Depending where the wildcard is placed will determine the different search results.
Example:

Keyword search

- note = note
- note* = note, notes, notebook
- *note = footnote
- *note* = footnotes

Exact Match – implicitly truncated

- metal = metal, metals, metalsmith, metalcasting
- *metal = fullmetal

**Search Results**

After you have made your selections on the General, Branches and Collections tabs, click the **Search** button to perform the search. The search results will display in the lower panel.

*Column Headers*

The column headers can be adjusted to reveal or hide more of an individual column. Click and drag between each header to resize the column to your needs. Column headers also provide a quick way to sort your results list. Clicking on a column header sorts the list from A-Z or 0-9999. Clicking again on a column header sorts the list from Z-A or 9999-0.

*More Information*

More information on a particular title can be easily seen, by right clicking on a title. The right-click context menu allows a user to move quickly to other functionality or link to related workforms.
On the right-click context menu, the Preview command allows staff to see quick information about a title and all connected items – staff can easily move through a list of titles by using the arrow up and down keys.

At the bottom of the search results window, you can quickly see how many records have been retrieved.
If the result set is large, only a subset of the results is initially brought back. If you want to see all results, **CTRL+SHIFT+A** will retrieve all the records.
There is a default limit set in the System Administration for a maximum of 1,000 records to be retrieved in a single search. You can change this setting by clicking on the **Settings** tab, edit the value in the **Retrieval Limit** box and click **[Search]**. This will make all results available to you; to see them all use **CTRL+SHIFT+A** to retrieve them to your list.

![Bibliographic Records - Title Find Tool](image)

The **Settings** tab allows you to change the limit for a search result. This will remain in effect until you close the search window. You cannot save this setting as part of the User Defaults.
RECORD SETS

- Creating a Record Set Directly from a Result List
- Creating a Record Set by Selection
- Creating a New Record Set
- Deleting a Record(s) from a Record Set
- Bulk Changes to Record Sets

Record Sets are subsets or virtual groupings of patron records. Records are grouped together for specific functions within Polaris – a listing of students or for bulk change purposes.

Creating a Record Sets Directly From a Result List

1. Before running a search using the Find Tool, click the Settings Tab.

2. Under Record Set Options, check the box to “Send Results to a New Record Set”.

3. The Name field will become available. This is a free-text field. Name your Record Set.

4. The Owner field is automatically filled in with your logon, but you can change the ownership of a record set to the branch level so everyone at your library will have access to the record set.

SHARE staff strongly recommends that you name your record sets starting with your 4-letter location code. This will make it easier for you to retrieve. When retrieving your record sets, you will only be able to see your library’s sets.
5. Go back to the **General** tab and perform your search. All search results will be sent to the record set window. The following window will appear:

![Polaris window](image1.png)

Do you wish to open it now?

6. After clicking **[Yes]**, you will see your Record Set window.

![Record Set window](image2.png)

This window shows you the individual records that belong to the Record Set. It gives you another opportunity to change the ownership and to add a note. The **Line Item Tool Bar** gives you options when working in the Record Set.
From left to right, you can Add by Searching, Add by Scanning, Remove Selected Record from the Record Set, Open the Patron’s Registration Record, Print, View the Properties of a Record, and Delete the Selected Record from SHARE (you may or may not have permissions to remove a record from SHARE).

Creating a Record Set by Selection

As you create lists, you can always add a name to a list by using the right-click functionality. Highlight a record; right-click then select Add to Record Set from the context menu. Your choices are to create a New record set or send this title to an Existing record set.

If you select New you will be taken to the Record Set screen, where you can name, change the ownership and add a note to the newly created record set. Click File, Save on the Shortcut Bar, or , or press CTRL+S to save this Record Set.
If you select **Existing**, a **Find Tool** window will appear. Search for your Record Set by name or owner. Double-click on the name of the Record Set to add the record to that list.

**Deleting a Record(s) from a Record Set**

Once the Record Set has been retrieved, you can remove one or more patrons from the set, by highlighting their name(s), click **Tools, Remove** or from the Line Item Tool Bar. This only removes the highlighted name(s) from your record set not from the entire SHARE database.

**Deletion of Record Sets**

If you wish to delete an entire Record Set, you must retrieve it first. Once the Record Set is retrieved, click **File, Delete** on the Shortcut Bar, or , or press **CTRL+D** to delete this Record Set.

**Bulk Changes to Record Sets**

You can make bulk changes to most fields on bibliographic, item or patron records. This depends on your permissions. 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.

1. Retrieve a Record Set workform.

2. Select **Tools, Bulk Change** or click or **CTRL+B** to display the Bulk Change dialog box.

3. Click **Report/Record Set (required)**. Change the location of the report. Polaris requires a report to be saved. You can pick your desktop or some other hard drive location for the saving of the report. Click **Browse** to access your computer drives.
4. Click the tabs for the page that contains the field you want to change. The tabbed pages correspond to on the bibliographic, item or patron workforms.

5. Select the check box for the field you want to change; the companion box becomes available. Select or type the new value for the field in the companion box.

6. Click [OK] to start the bulk change process. The **Summary of Changes** will appear:

![Summary of Changes](image)

**This bulk change process will attempt to change**

5 patron record(s).

- **Record set name:** cool patrons_20121215165356
- **Record set owner:** traci
- **Bulk change report:** C:\Users\dscalia\Desktop\PatronBulkChangeReq
- **Error record set name:**
- **Error record set owner:**

Registered branch: Illinois Heartland Library System - Champaign (br)

Once made, these changes cannot be automatically undone.

- **Continue**
- **Cancel**
- **Help**

7. Click [**Continue**] to confirm your bulk change settings.

8. Click [**OK**] on the message box. The Record Set workform appears with a confirming message that the bulk changes have been completed.
If you need to, you can view the **Bulk Change Report** with a text editor or word processor.

**Creating a New Record Set**

1. On the main Polaris toolbar, click **New**, or \(\text{CTRL}+\text{N}\), the following window appears:

2. Highlight **Record Set**, and then click [OK].

3. Choose **Item** in the drop down box. Click [OK].

4. Input the Name of the Patron Record Set, change Owner to your *branch* if you wish to share it with others in your library.
5. To begin adding items to this Record Set, click the **Find** or **Find by Barcode** icon on the Line Item Bar.
WORKFORMS

- Layout
- Property Sheets

Layout

Throughout Polaris you will be utilizing workforms. A workform is a window in Polaris where you can view, enter and edit data.

The parts of a workform are:

- Menu Bar – access functions of the entire workform via drop-down menus
- Toolbar – access functions of the entire workform via icons
- Views – different pages of the workform
- Line Item Toolbar – controls functions of the workform below itself – also known as the Coolbar.

Property Sheets

From any workform you can go to File, Properties or press F8 to retrieve the corresponding property sheet. Property Sheets contain useful information about records in the database. You can also retrieve Property Sheet information on an individual title, item or patron.
## APPENDIX A
Patron Services/Circulation Shortcuts and Function Keys

### General

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<thead>
<tr>
<th>Action</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workform Help</td>
<td>F1</td>
</tr>
<tr>
<td>Find Tool – Patron Registration workform (online only)</td>
<td>F7</td>
</tr>
<tr>
<td>Find Tool – Patron Registration workform (from workform)</td>
<td>CTRL+O</td>
</tr>
<tr>
<td>Find Tool – Patron Status workform (online only)</td>
<td>F6</td>
</tr>
<tr>
<td>Find Tool – Patron Status workform (from workform)</td>
<td>CTRL+O</td>
</tr>
<tr>
<td>New workform</td>
<td>CTRL+N</td>
</tr>
<tr>
<td>Close workform</td>
<td>ALT+F4</td>
</tr>
<tr>
<td>Save record</td>
<td>CTRL+S</td>
</tr>
<tr>
<td>Delete record</td>
<td>CTRL+D</td>
</tr>
<tr>
<td>Cycle from one workform view to the next</td>
<td>CTRL+TAB</td>
</tr>
<tr>
<td>Open the Tools Options dialog</td>
<td>CTRL+T</td>
</tr>
<tr>
<td>Switch between patron registration/patron status</td>
<td>F9</td>
</tr>
<tr>
<td>Properties</td>
<td>F8</td>
</tr>
</tbody>
</table>

### Print

<table>
<thead>
<tr>
<th>Action</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print current view</td>
<td>CTRL+P</td>
</tr>
<tr>
<td>Print current list view</td>
<td>CTRL+SHIFT+P</td>
</tr>
</tbody>
</table>

### Record Sets

<table>
<thead>
<tr>
<th>Action</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>New record set</td>
<td>CTRL+N</td>
</tr>
<tr>
<td>Find Tool – Record Set workform</td>
<td>CTRL+O</td>
</tr>
<tr>
<td>Load all records in Find Tool results set</td>
<td>CTRL+SHIFT+A</td>
</tr>
<tr>
<td>Add member by searching</td>
<td>CTRL+E</td>
</tr>
<tr>
<td>Add member by scanning</td>
<td>CTRL+K</td>
</tr>
<tr>
<td>Bulk Change</td>
<td>CTRL+B</td>
</tr>
<tr>
<td>Save record set</td>
<td>CTRL+S</td>
</tr>
<tr>
<td>Close workform</td>
<td>ALT+F4</td>
</tr>
<tr>
<td>Delete record set</td>
<td>CTRL+D</td>
</tr>
<tr>
<td>Properties</td>
<td>F8</td>
</tr>
</tbody>
</table>

### Check Out

<table>
<thead>
<tr>
<th>Action</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Check Out workform</td>
<td>F3</td>
</tr>
<tr>
<td>Find patron</td>
<td>CTRL+R</td>
</tr>
<tr>
<td>Previous patron barcode</td>
<td>F4</td>
</tr>
<tr>
<td>Find item</td>
<td>CTRL+I</td>
</tr>
<tr>
<td>Find bibliographic record</td>
<td>CTRL+B</td>
</tr>
</tbody>
</table>
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 Association 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 workflow                 CTRL+F4
Refresh                        F5

**Hold Request Shortcuts**

New Request                    CTRL+N
Convert to ILL                  CTRL+I
Deny Hold                      CTRL+R
<table>
<thead>
<tr>
<th>Action</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancel</td>
<td>CTRL+L</td>
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<tr>
<td>Reactivate</td>
<td>CTRL+A</td>
</tr>
<tr>
<td>Delete</td>
<td>CTRL+D</td>
</tr>
<tr>
<td>Properties</td>
<td>F8</td>
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</tbody>
</table>

**Hold Request Workform**

<table>
<thead>
<tr>
<th>Action</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Request (new patron, new title)</td>
<td>CTRL+N</td>
</tr>
<tr>
<td>New Request (new patron, same title)</td>
<td>CTRL+G</td>
</tr>
<tr>
<td>New Request (same patron, new title)</td>
<td>CTRL+H</td>
</tr>
<tr>
<td>Save</td>
<td>CTRL+S</td>
</tr>
<tr>
<td>Properties</td>
<td>F8</td>
</tr>
<tr>
<td>Refresh</td>
<td>F5</td>
</tr>
<tr>
<td>Delete</td>
<td>CTRL+D</td>
</tr>
<tr>
<td>Convert to ILL</td>
<td>CTRL+I</td>
</tr>
<tr>
<td>Deny Hold</td>
<td>CTRL+R</td>
</tr>
<tr>
<td>Cancel Hold</td>
<td>CTRL+L</td>
</tr>
<tr>
<td>Reactivate</td>
<td>CTRL+A</td>
</tr>
<tr>
<td>Fill Request Now</td>
<td>CTRL+F</td>
</tr>
<tr>
<td>Options</td>
<td>CTRL+T</td>
</tr>
</tbody>
</table>

**Multi-request Patron View**

<table>
<thead>
<tr>
<th>Action</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add patron</td>
<td>CTRL+R</td>
</tr>
<tr>
<td>Remove patron</td>
<td>CTRL+E</td>
</tr>
<tr>
<td>Add title</td>
<td>CTRL+T</td>
</tr>
<tr>
<td>Remove title</td>
<td>CTRL+M</td>
</tr>
</tbody>
</table>

**Holds Queue Workform**

<table>
<thead>
<tr>
<th>Action</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>CTRL+S</td>
</tr>
<tr>
<td>Refresh</td>
<td>F5</td>
</tr>
<tr>
<td>New Request</td>
<td>CTRL+H</td>
</tr>
<tr>
<td>Move Up</td>
<td>CTRL+U</td>
</tr>
<tr>
<td>Move Down</td>
<td>CTRL+W</td>
</tr>
<tr>
<td>Move Top</td>
<td>CTRL+T</td>
</tr>
</tbody>
</table>