PATRONS

DEVELOPED BY THE
SHARE STAFF SERVICES TEAM
Winter 2013

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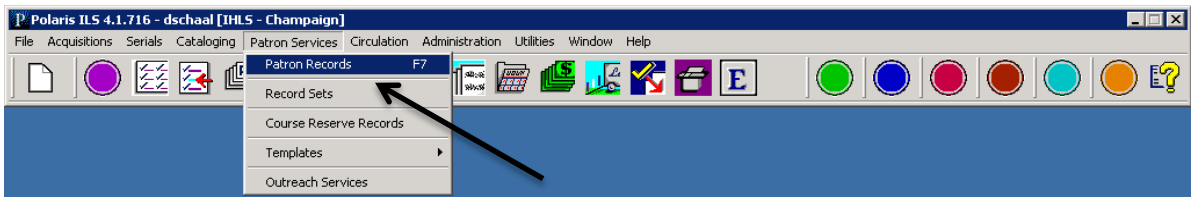
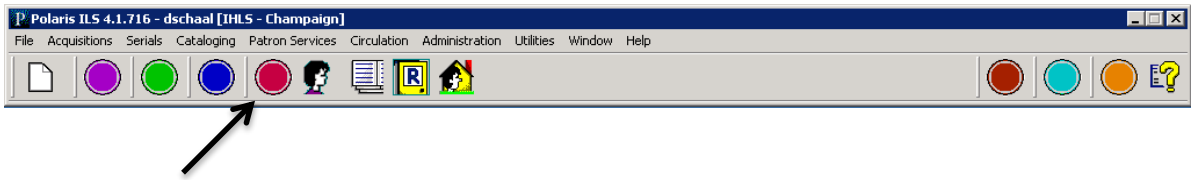
Patron Service Menu

To access Patron Services, you can use the Patron Services drop down menu or click on the first red marble on the tool bar. From there you can access:

- Patron Records – Patron Registration versus Patron Status
- Patron Record Sets
- Course Reserves and Templates (if applicable to your permissions)
- Outreach Services (if applicable to your permissions)



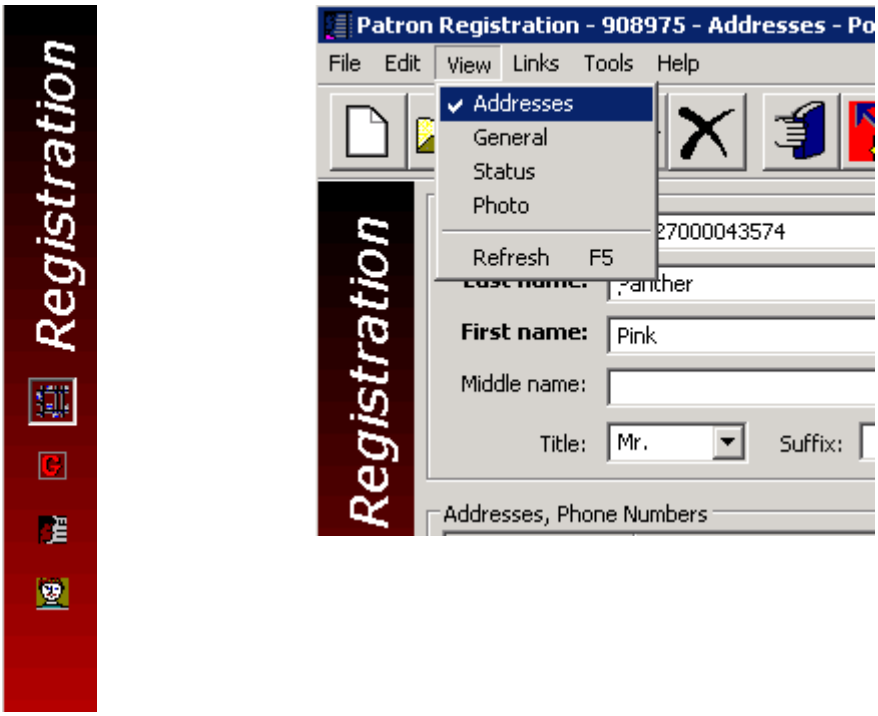


Patron Registration Record

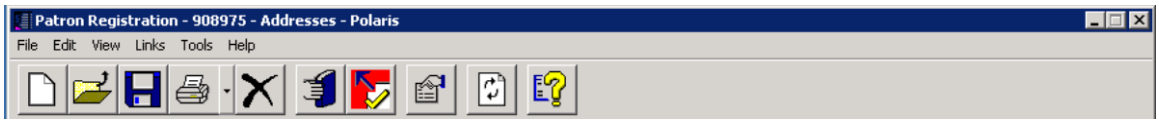
The Patron Registration workform contains the following views:

- Address and phone view
- General view
- Status view
- Patron photo view (currently not accessible for SHARE).

You can access the different views by either clicking on one of the icons in left vertical bar or click **View** and select the appropriate view on the Shortcut Bar.



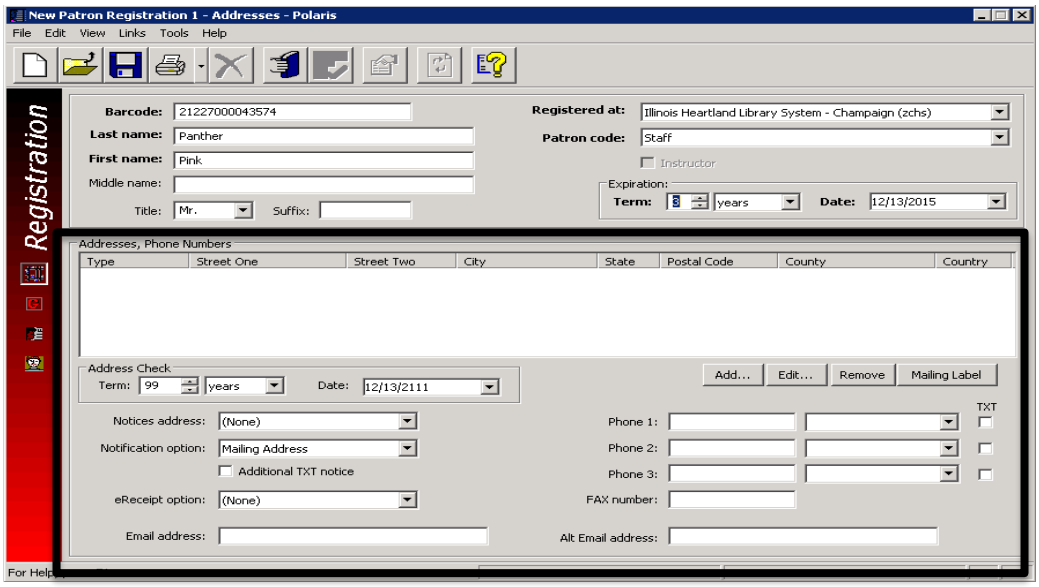
From the **Patron Status** workform, you can print, delete, place a hold, check out, look at the properties, or refresh the workform for this patron.



Address and Phone View

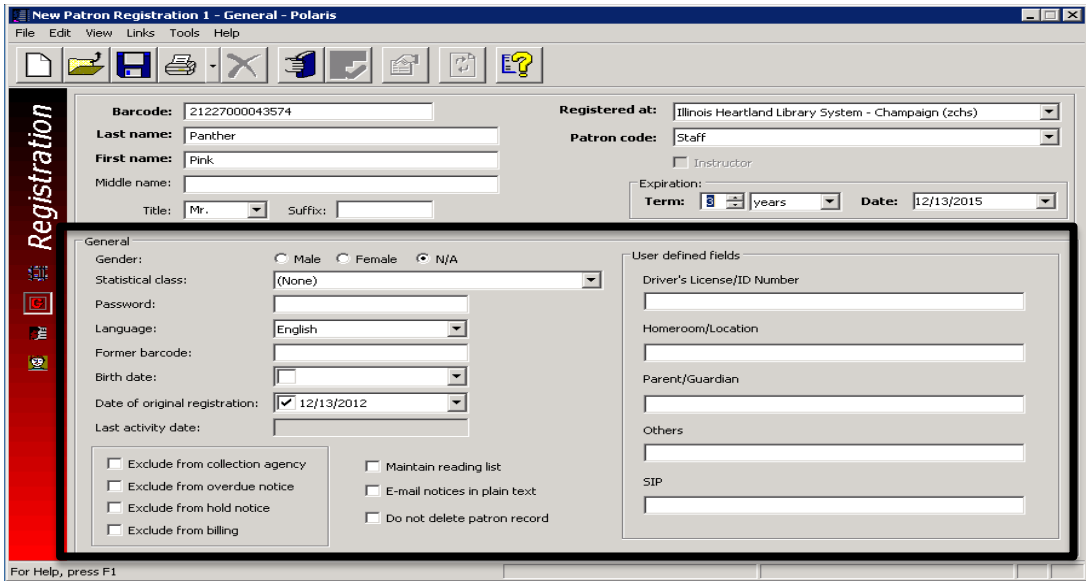
Several fields are required in the address and phone view: barcode, last name, first name, registered at, and patron code. The other fields are optional and left up to the discretion of the library.

Points of contact information and notification preferences are set in this view. Only one phone can be designated for TXT messages. If the notification option is set to TXT only one notice will be sent to the designated mobile phone.



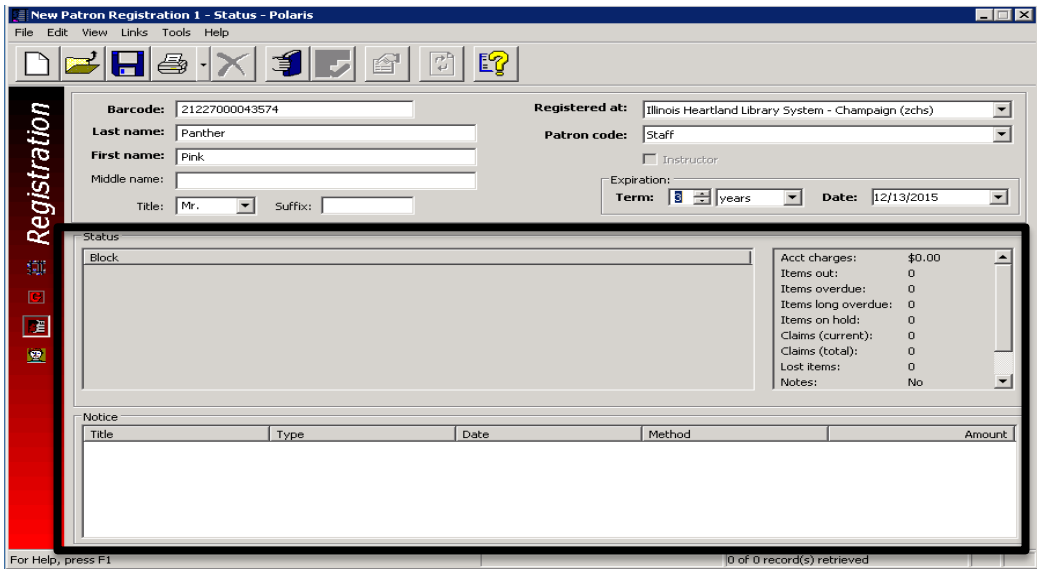
General View

The general view contains information regarding the patron such as male/female, statistical class, barcode, password (*****), date of registration, birthdate, etc. There are also 5 user-defined fields that SHARE staff identified. These include: Driver's License/ID Number, Homeroom/Location, Parent/Guardian, Others, and SIP. Other options are available at the library's discretion such as to exclude this particular patron from collection, overdue notices, hold notices, or billing notices; sending email notification in plain text or marking a patron record as "do not delete". A checkbox for a "reading history" is also located here. This box, when checked, means that the patron is maintaining a reading history of what items they have checked out. There are system limits for reading histories: 5 years with a maximum history of 1,000 items.



Status View

The status view contains information regarding the patron's record including fines, blocks, number of items checked out and their history of current notices.



Patron Photo View

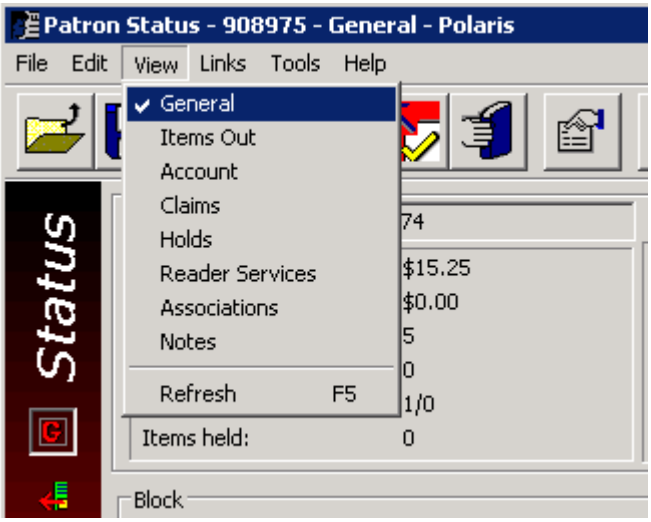
The photo view is an optional view that may be implemented in the future for those libraries wishing to capture photos of their patrons.

Patron Status Record

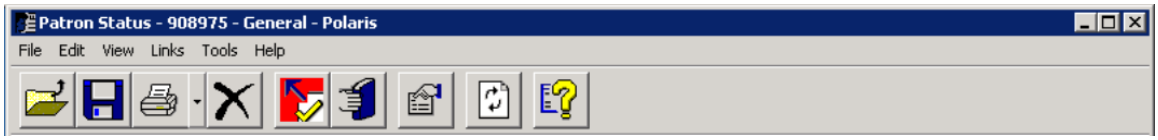
The Patron Status workform contains the following views:

- General view
- Items Out view
- Account view
- Claims view
- Holds view
- Reader Services view
- Associations view
- Notes view

You can access the different views by either clicking on one of the icons in left vertical bar or click **View** and select the view on the Shortcut Bar.



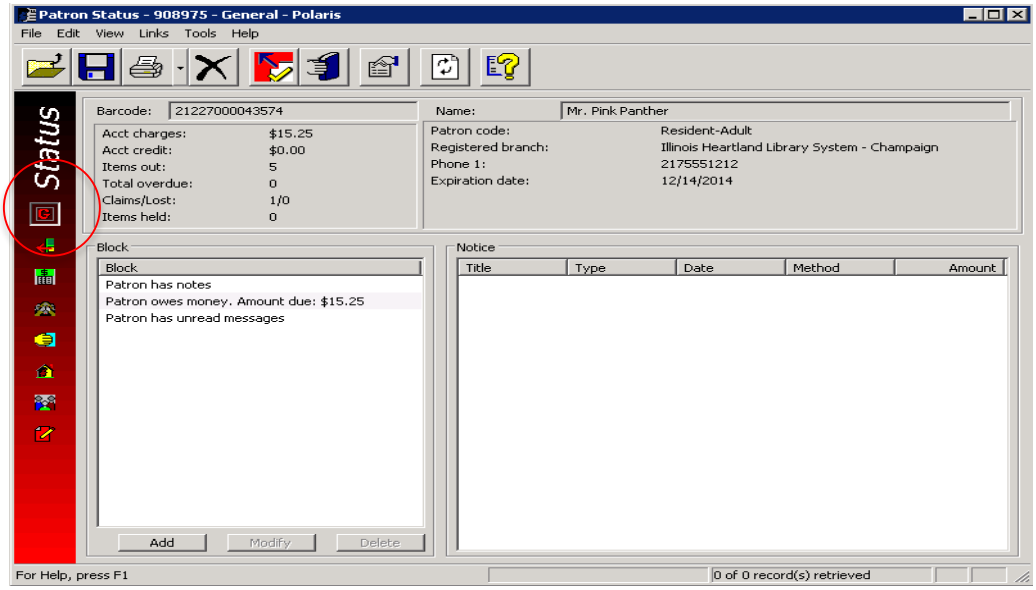
From the **Patron Status** workform, you can delete, place a hold, check out, look at the properties, or refresh the workform for this patron.



Each view contains overview information about a patron such as accumulative account charges, number of items out, total overdue, number of claims/lost, items held, etc.

General View

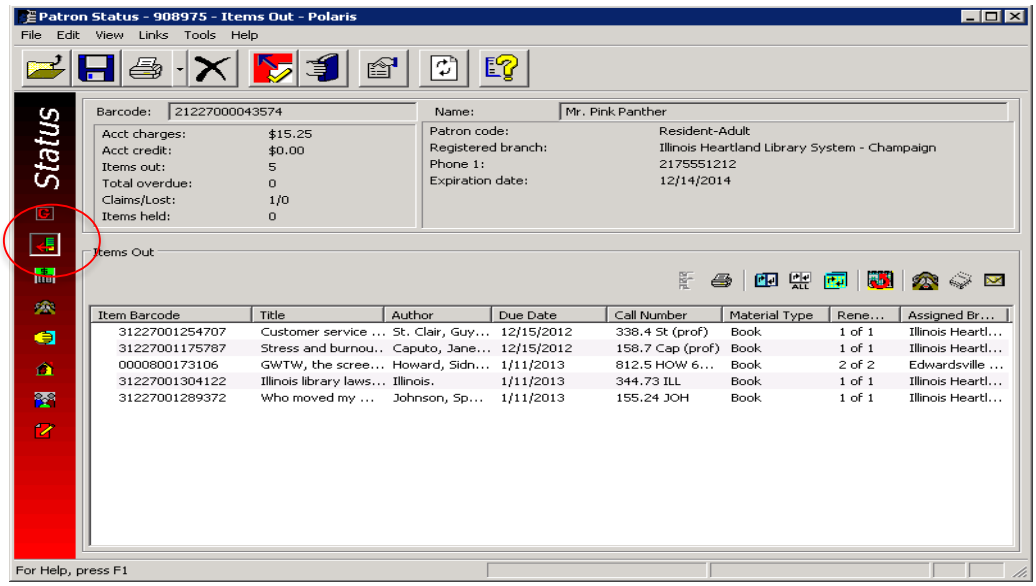
Along with the overview information, the General view contains any blocks currently on the patron account and when they received their last notice. You can add a library assigned block to this window using choices from a drop down menu or free-text.



Items Out View

Along with the overview information, the Items Out view contains an individual listing for each item that is currently checked out to the patron. Item information includes the barcode, title, author, due date, call number, material type, whether or not a renewal is allowed or has occurred and the assigned branch for the item.

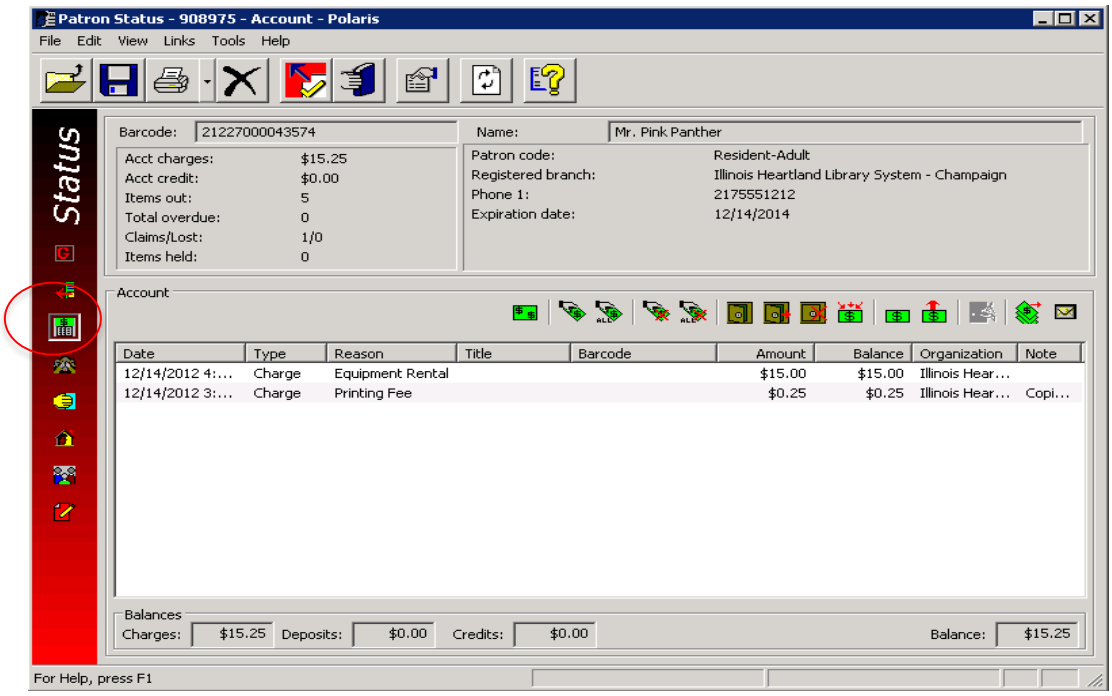
You can print the items out list, renew one item, renew all items, special renewal, reset the due date, make a claim on an item, declare an item lost or check the patron's notification history.



Account View

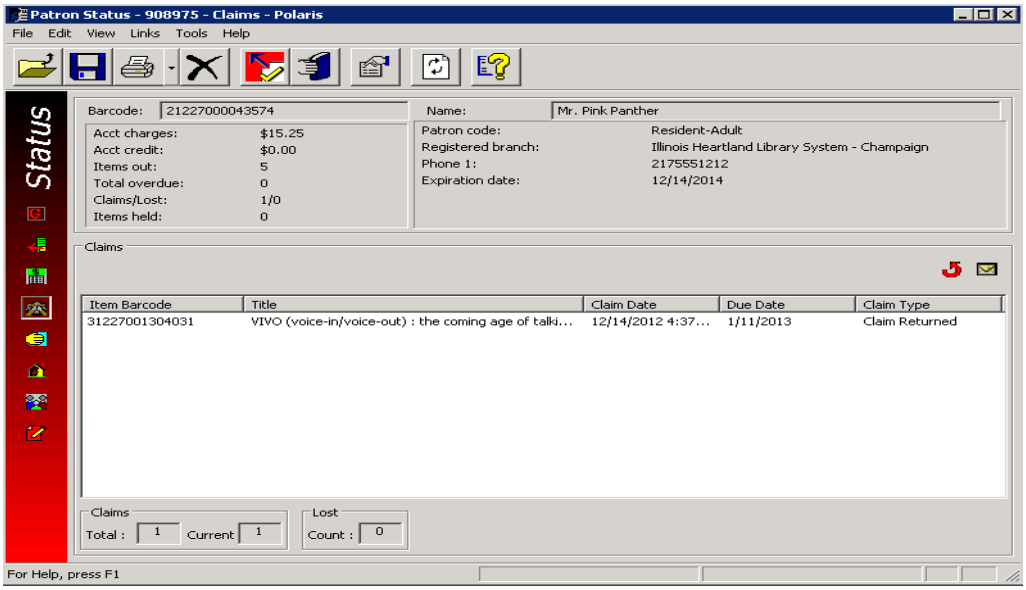
Along with the overview information, the Account view contains an individual listing for each fine that is currently charged to the patron's record. Fine information includes the date, type, reason, title (if applicable), barcode (if applicable), amount, organization and any notes.

You can add another charge to this account, pay one line, pay all lines, waive one line, waive all lines, create credits or refunds, view the transaction summary or patron's notification history.



Claims View

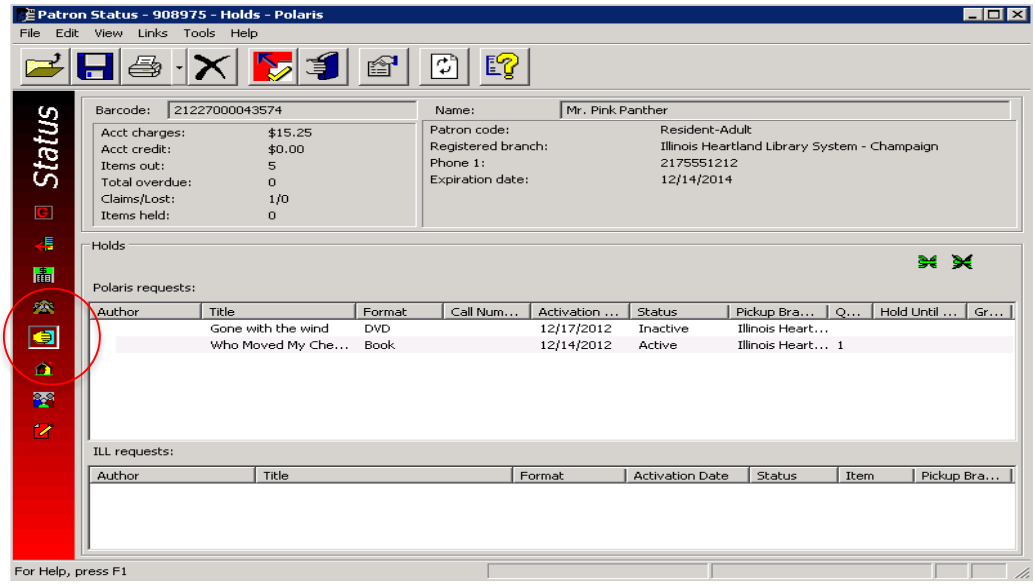
Along with the overview information, the Claims view contains an individual listing for each claimed item fine that is currently on the patron's record. Claim information includes the item barcode, title, claim date, due date, and claim type. You can view the patron's notification history.



Holds View

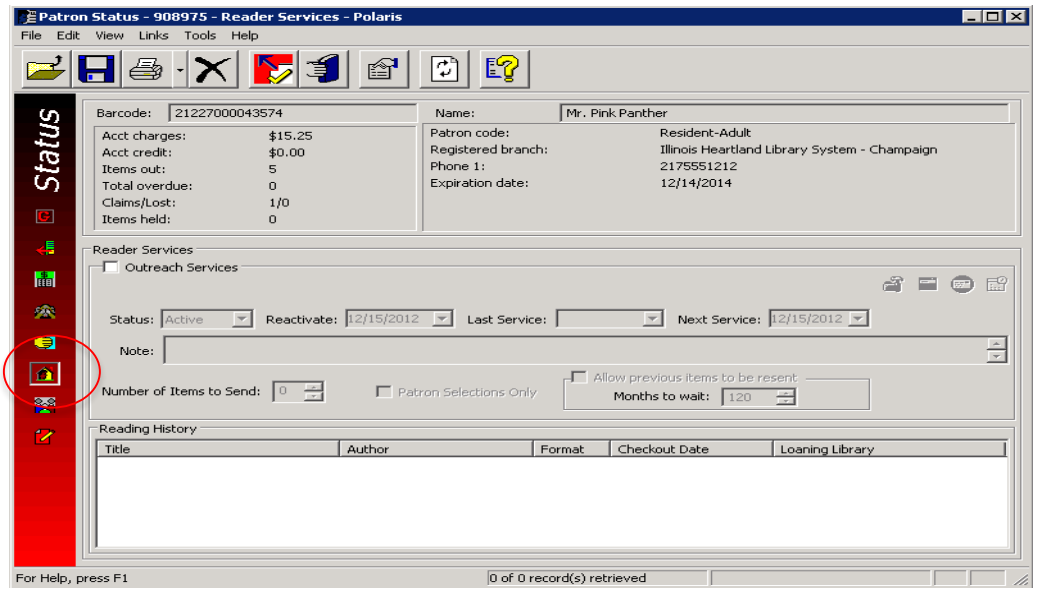
Along with the overview information, the Holds view contains an individual listing for each hold that is currently on the patron's record. Holds information include the author, title, format, call number, activation date of the hold, status, pickup branch, position in the queue, hold until date, and group.

You can add a hold to a group or remove a hold from a group. This view also contains ILL requests. This will be discussed in the SHARE Holds manual.



Reader Services View

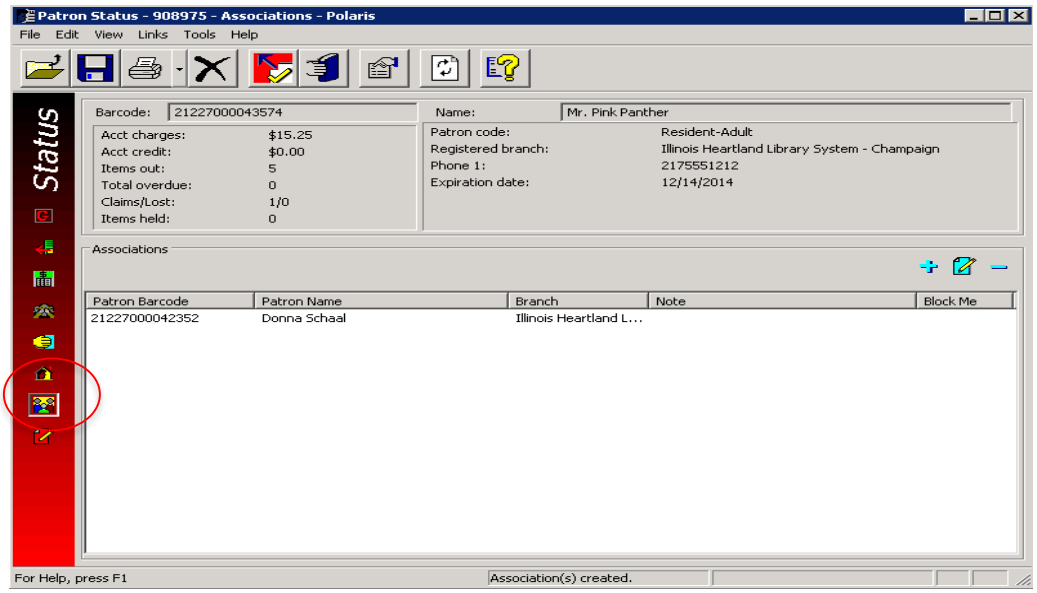
Along with the overview information, the Reader Services view contains an individual listing for each title that has been read by the patron. A list will be generated, if that patron has opted to keep a reading list. For this option to be available, the library must 'opt in' to the Reading History. If a library has opted in to allow Reading History, it will be available for selection on the General view of the Patron Registration window.



Associations View

Along with the overview information, the Associations view contains any associated patrons with this patron's record. For instance, parents to a child's record.

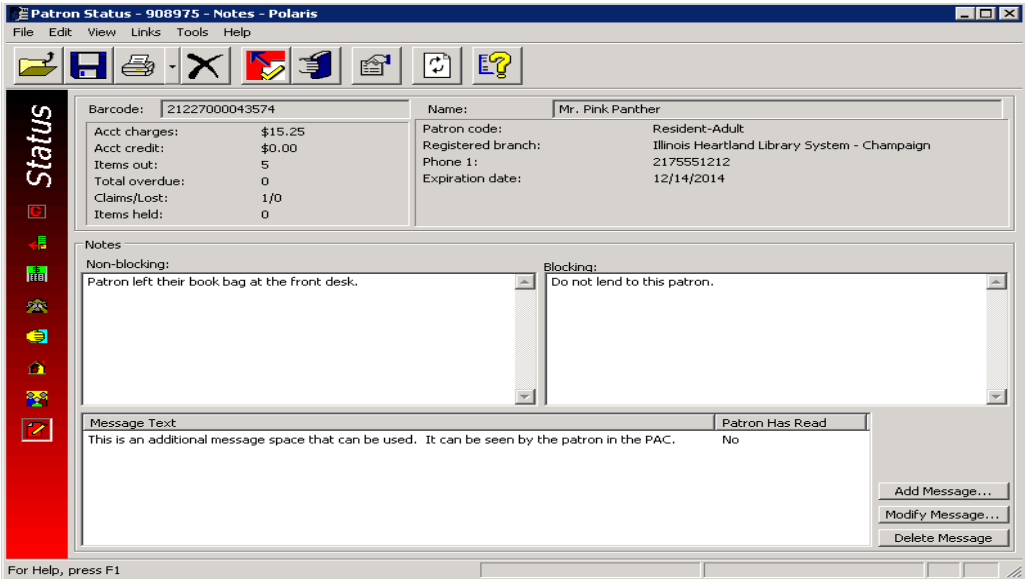
You can add, edit or remove an association in this view. This will be discussed in detail later in this manual.



Notes View

Along with the overview information, the Notes view contains any non-blocking or blocking notes that this patron may have on their account. A message can also be added so that the patron will see it in the PAC.

You can add, edit, or remove notes in this view.



Details for the different patron status views will be discussed in the Basic Circulation manual.

REGISTERING PATRONS

- **Create a Patron Record**
- **Editing and Deleting a Patron Record**
- **Copy a Patron Record**
- **Merging a Patron Record**
- **Express Registration**
- **Patron Duplication Detection**
- **Post a Message from a Patron Registration Record**
- **Patron Associations**

Create a Patron Record

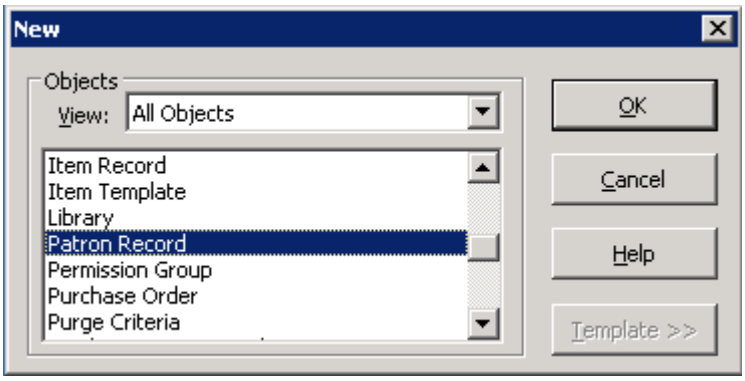
Preferred Method for Public Libraries

After searching to verify that the patron does not currently exist in SHARE, right-click on any patron record, and then select **Create Patron** from the context menu or click **File, New** on the Shortcut Bar. See the Find Tool for more information. Follow the steps below to add information for a new patron.

Create a New Patron Record

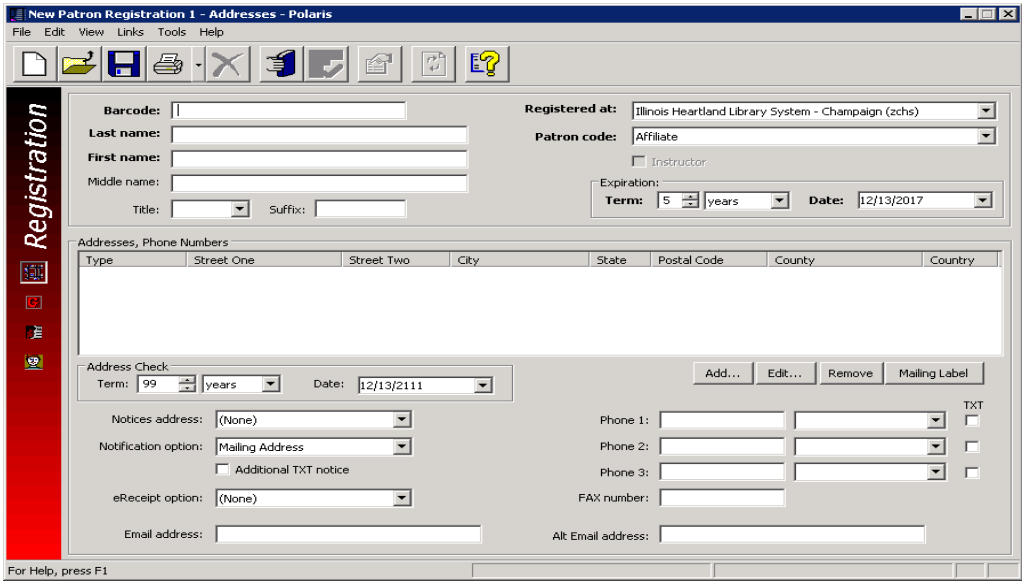
1. Click **File, New** from the Shortcut Bar, click  , or press **CTRL+N**.

   The New dialog box appears:



2. Select **Patron Record** in the **Objects** box, and click **[OK]** or press **[Enter].**

The address and phone view of the Patron Registration workform appears:



3. Scan a new patron's barcode in the **Barcode** box, or type the barcode.

4. Type the patron's last name in the **Last Name** box.

5. Type the patron's first name in the **First Name** box.

6. To input *optional* name information, follow these steps:

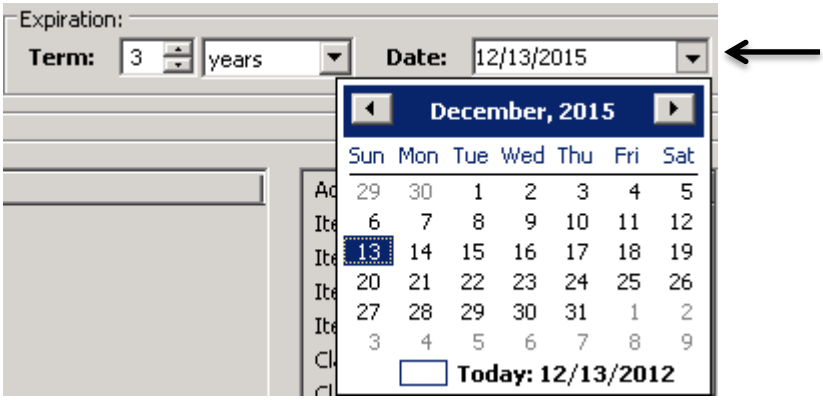
   - Type the middle name or initial in the **Middle Name** box.
   - Select the patron's title in the **Title** box.
   - Type the patron's suffix (such as Jr. or Sr.) in the **Suffix** box.

7. Select the patron's registration location in the **Registered at** box. This will default to your library's location.

8. Select the patron's code in the **Patron code** box.

9. Use one of the following methods to set the registration term:

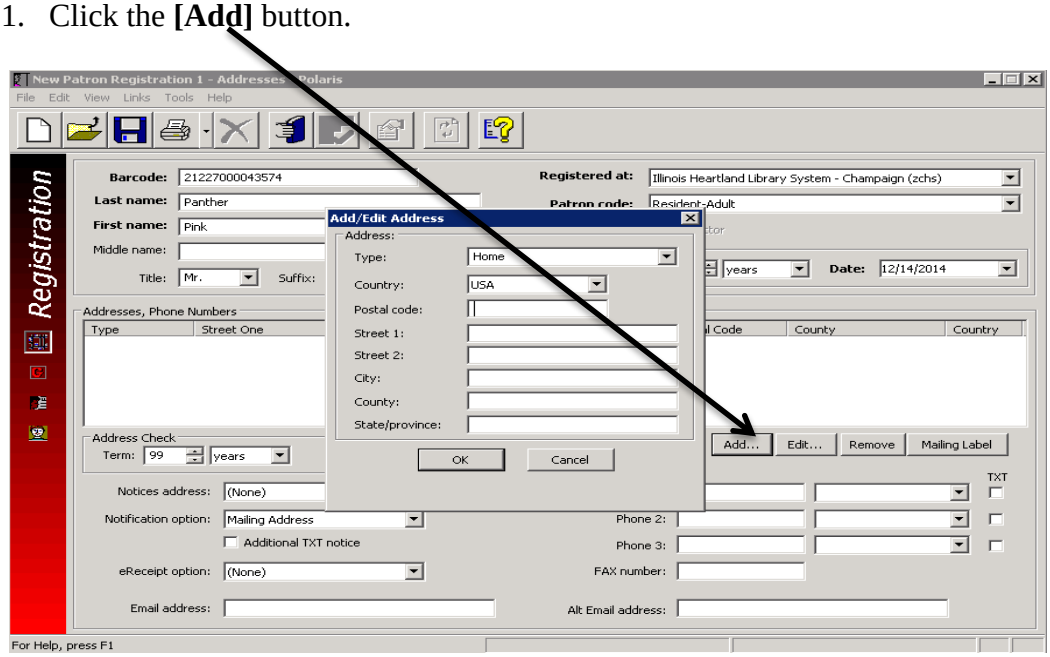
   - Set a date according to the current date (such as two years from today) – Type a number in the first **Expiration Term** box, and select months or years in the second **Term** box. The exact date is automatically calculated and appears in the **Expiration Date** box.
   - Type a specific date – Type 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.



The patron code is defaulted to the library's most often-used patron code. The expiration date automatically defaults to the setting in that patron code. There can only be one default patron code and expiration date.

Add an Address under the address, phone number section:

1. Click the **[Add]** button.



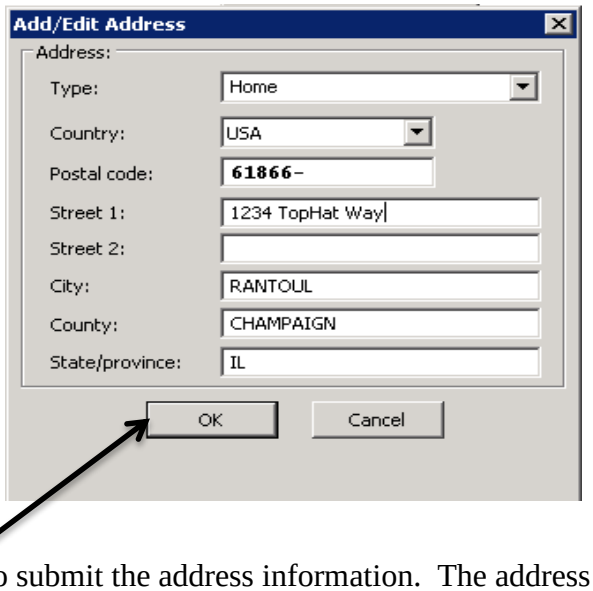
The Add/Edit Address dialog box appears.

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

3. Select the country in the Country box (USA is the default).

4. Type the zip code in the **Postal Code** box. Polaris automatically fills in the City, State, and County boxes. You may have to select the appropriate town from a list.

5. 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.



6. Click **[OK]** to submit the address information. The address view appears with the address information in the Addresses, Phone Numbers list.

You can add as many addresses, as needed.

To edit an address, highlight the address line, then click **[Edit]** or right-click the address and select **Edit** from the context menu. Change any needed fields and click **[OK]** to submit.

To delete an address, highlight the address line, then click **[Remove]** or right-click the address and select **Remove** from the context menu.

Add Notification data to a patron record:

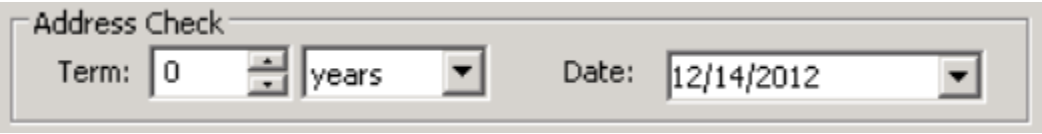
Notification data specifies when address information should be updated and how the patron wants to receive notices, such as for held and overdue items. Follow these steps to add notification data to a patron record:

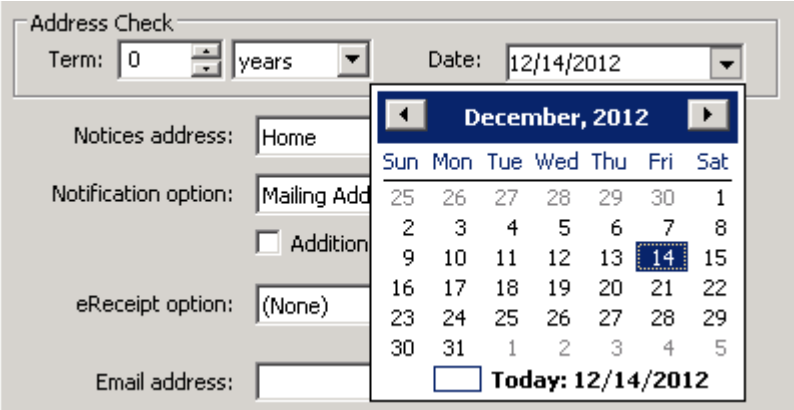
1. Use one of the following methods to set the address check term:

   - 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 selects months or years

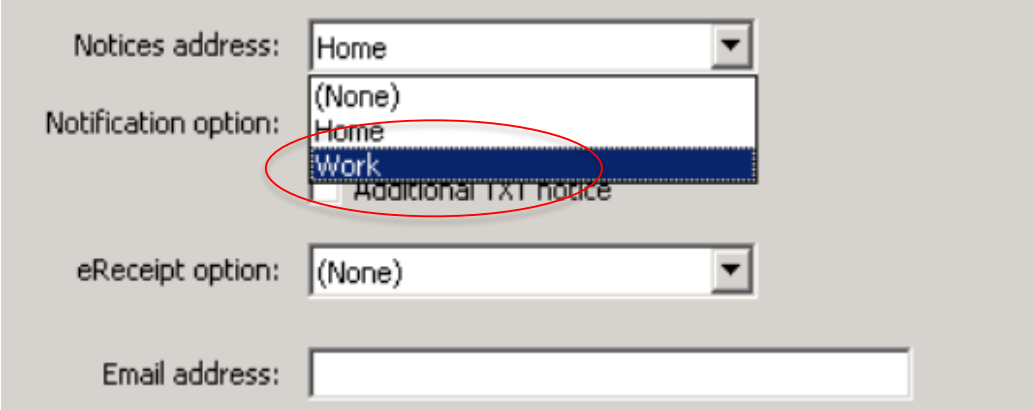
in the second **Term** box. The exact date is automatically calculated and appears in the **Address Check Date** box.

- 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.





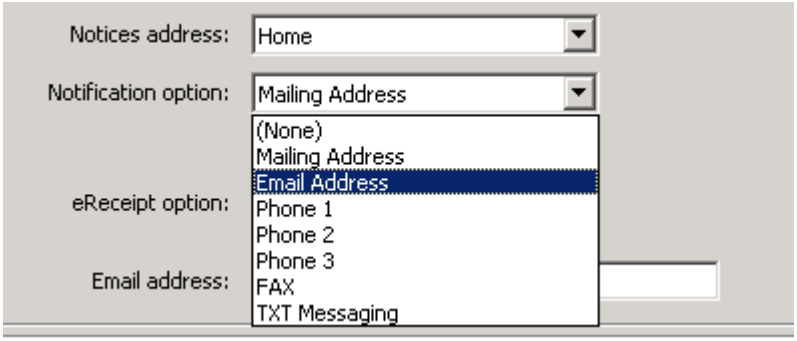
2. Select the address for receiving notifications in the **Notices address** box.



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

- You can use the **Phone** options only if the library has telephony software for automatic telephone notification. The system uses Phone 1. If you select Phone 2 or Phone 3 as the notification option, be sure these numbers are supplied in the appropriate Phone boxes. Enter 1+Area Code+Number.
- 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 **FAX** option for notification, the patron record must include a fax number.
- 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.
- You can exclude the patron from receiving certain notices, and make this patron exempt from collection agency processing. To prevent the patron from receiving any notices at all, select **None** in the **Notification option** box.

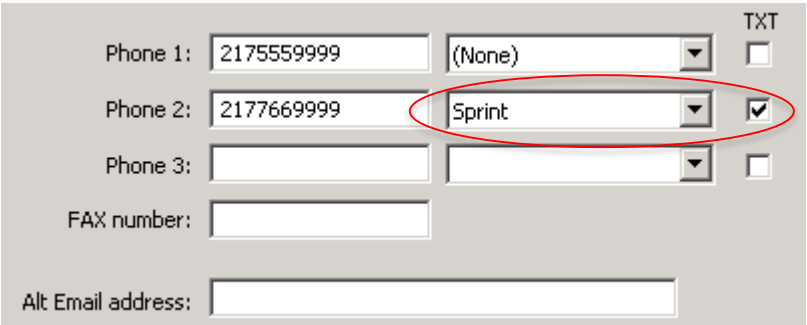
4. (Optional) Type the patron's email address in the **Email address** box. This address can be used for sending overdue, billing, request, e-mail reminder, and routing notices, as well as e-mail receipts. To deliver notices to a patron via e-mail, the **Notification option** box must be set to Email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



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

6. Type the patron's phone number in the **Phone 1** box.

7. If you want to use additional phone numbers, type the phone numbers in the **Phone 2** and **Phone 3** boxes.



8. 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.

9. 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.

10. (Optional) Type the fax number in the Fax number box.

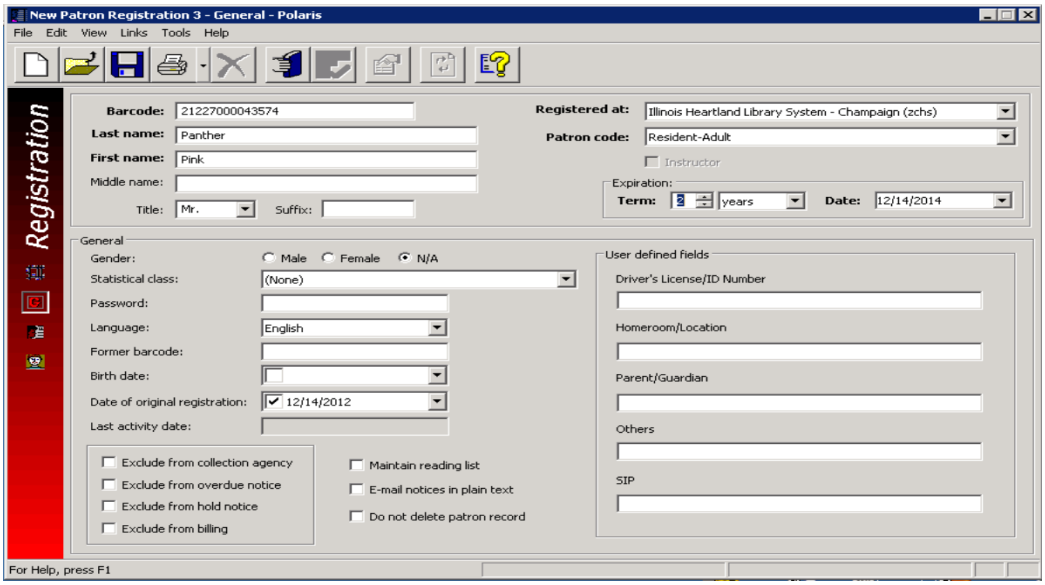
11. Select Additional TXT notice if the patron's mobile phone accepts text messages and your library sends text messages *in addition* to other types of notices such as e-mail or print.

12. At this time, eReceipts will not be available.

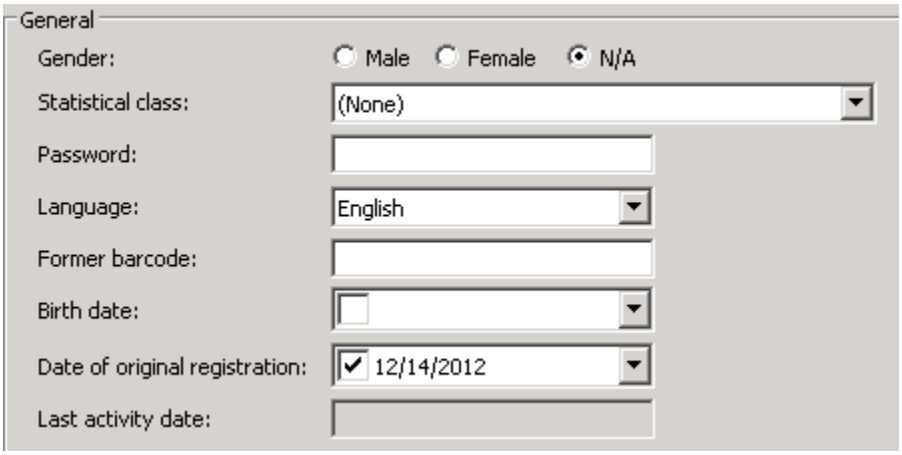
Add general data to a patron record

The patron record contains general data that may be used for statistical purposes, as well as any user-defined fields. 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:

1. Select **View, General** or click  to display the General View. The following window appears repeating the top portion of the patron window along with the general options:



2. Click on the of the following **Gender** options: Male, Female or N/A (if your library chooses not to track gender).



3. (Optional) Select the appropriate statistical class from the drop down menu.

4. Type the patron's password in the **Password** box. The patron uses this password along with their barcode or user name, to access their account or place holds in the PAC. The password must be a minimum of 4 characters and a maximum of 16, and may include capital letters, lowercase letters, and numbers. Passwords are case-sensitive. Do not include spaces or special characters.

5. Select the patron's primary language in the **Language** box. The default is English.

6. If appropriate, scan the patron's previous ID in the **Former barcode** box or type the barcode.

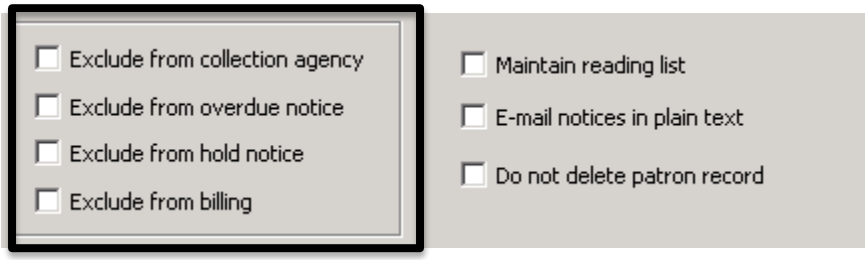
7. Enter the patron's birth date in the **Birth date** box using one of these methods:

   - Type a specific date – Select 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 not visible. It reappears when you check the box.

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

8. Date of original registration and last activity date will automatically fill in as the patron utilizes their card.

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

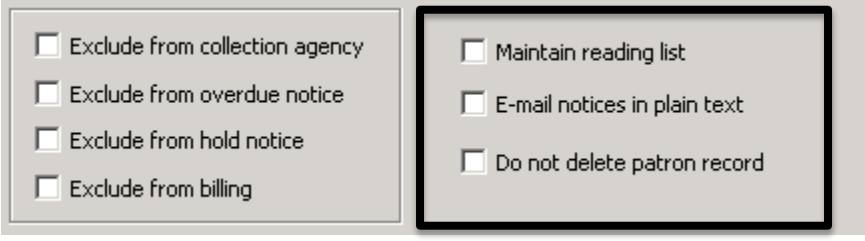


10. To prevent this patron from receiving overdue notices, select the **Exclude from overdue notice check** box.

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

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

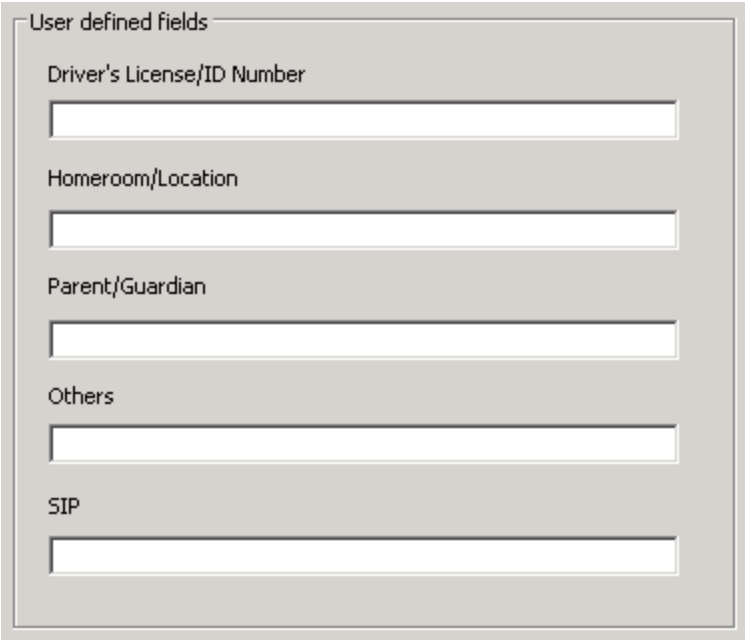
13. If you want Polaris to track a reading history for the patron, select the **Maintain permanent reading list check** box. Note: Your library must 'opt in' to keep Reading Histories. This box will be grayed out for libraries not opting in.



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

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

16. If your library requires additional information, type or select the appropriate data in the **User defined fields** boxes. SHARE has defined the User-Defined fields as follows:



- Driver's License/ID Number
- Homeroom (for schools)/Location – Enter HomeRoom codes starting with your 4-letter agency code
- Parent/Guardian
- Others
- SIP

After you have entered all aspects of the patron's information, click **File, Save** on the Shortcut Bar, or  , or press **CTRL+S** to save this record. If you forget to do this, you will be prompted to Save before closing the window.

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.

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.

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** on the Shortcut Bar, or  , or press **CTRL+S** to save this record.

   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*.)

   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.

Editing and Deleting a Patron Record

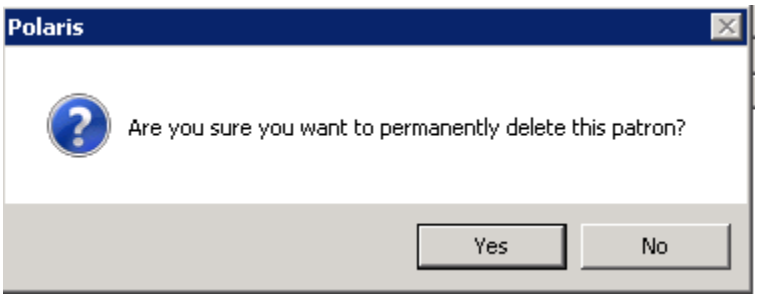
To edit a patron record, retrieve the patron record by using the **Find Tool** as described in this manual.

1. Highlight the name of the patron to edit, right-click then select **Open** from the context menu to go to **Patron Registration**. Double-click the patron's name to go to **Patron Status**.

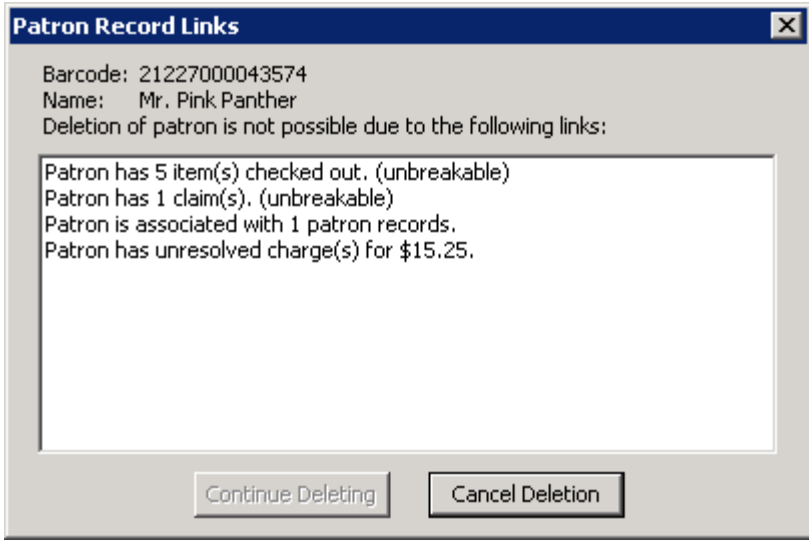
2. Edit any and all views, as needed. Click **File, Save** on the Shortcut Bar, or  , or press **CTRL+S** to save the record.

To delete a patron record, retrieve the patron record by using the Find Tool as described in this manual.

1. Highlight the name of the patron to delete, right-click and then select **Delete** from the context menu. A warning message will appear, click **[Yes]** to confirm or **[No]** to cancel the operation.



2. After clicking “Yes”, Polaris will check to see if this patron has any blocks or items out, if there are any problems with their record, you will see the following message:

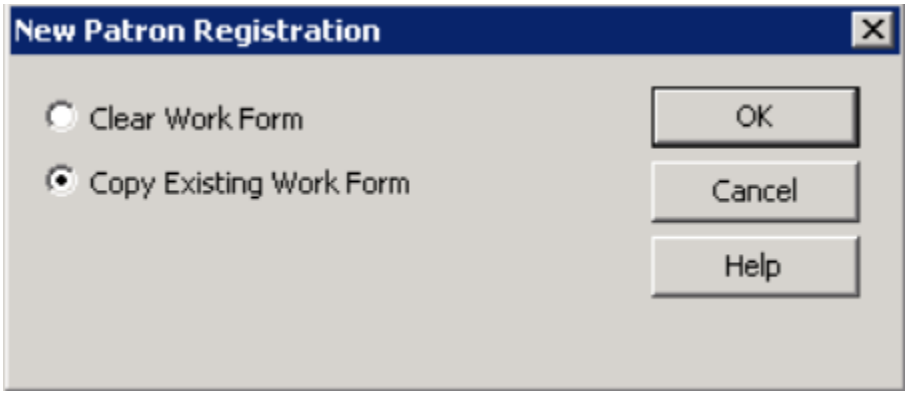


Any unbreakable blocks will have to be corrected before a patron can be removed. Your only option would be to **Cancel Deletion**.

Copy a Patron Record

Copying a record can be helpful if you are creating records for multiple members of a household.

1. After registering the first patron or opening a current registration record, click **File, New** from the Shortcut Bar, click , or press **CTRL+N**.
2. Select Copy Existing Work form then click **OK** or press **[Enter].**

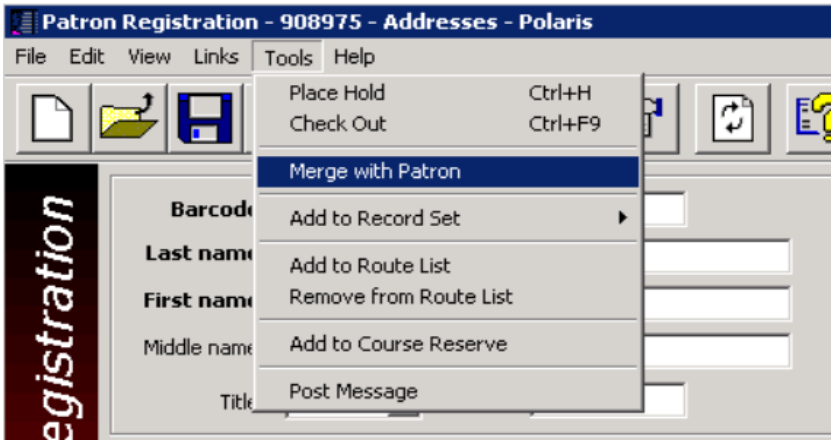


3. All of the information from the original registration is copied to the new one except for the barcode and password. Edit any and all views, as needed. Click **File, Save** on the Shortcut Bar, or  , or press **CTRL+S** to save the record.

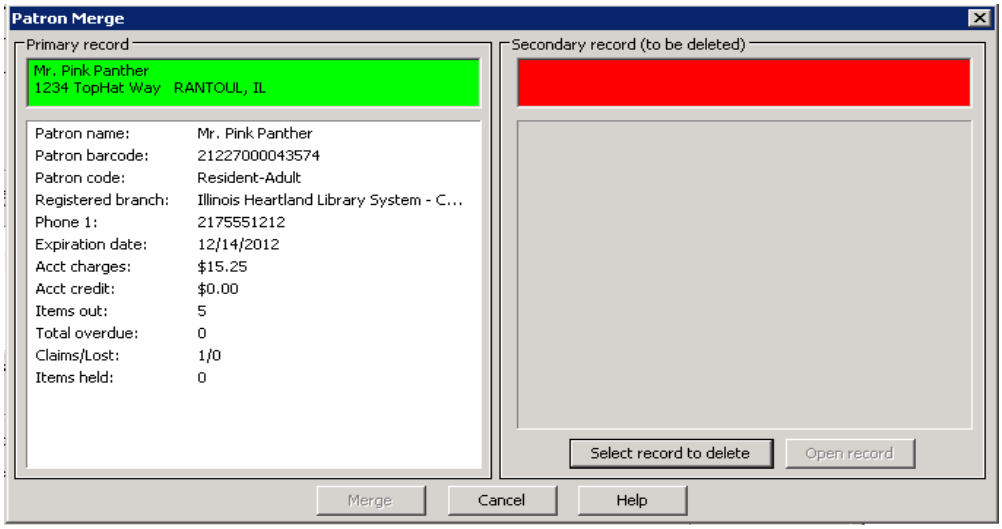
Merging a Patron Record

Merging patron records can be helpful if you discover duplicate patron registrations in SHARE such as misspelled names or name changes.

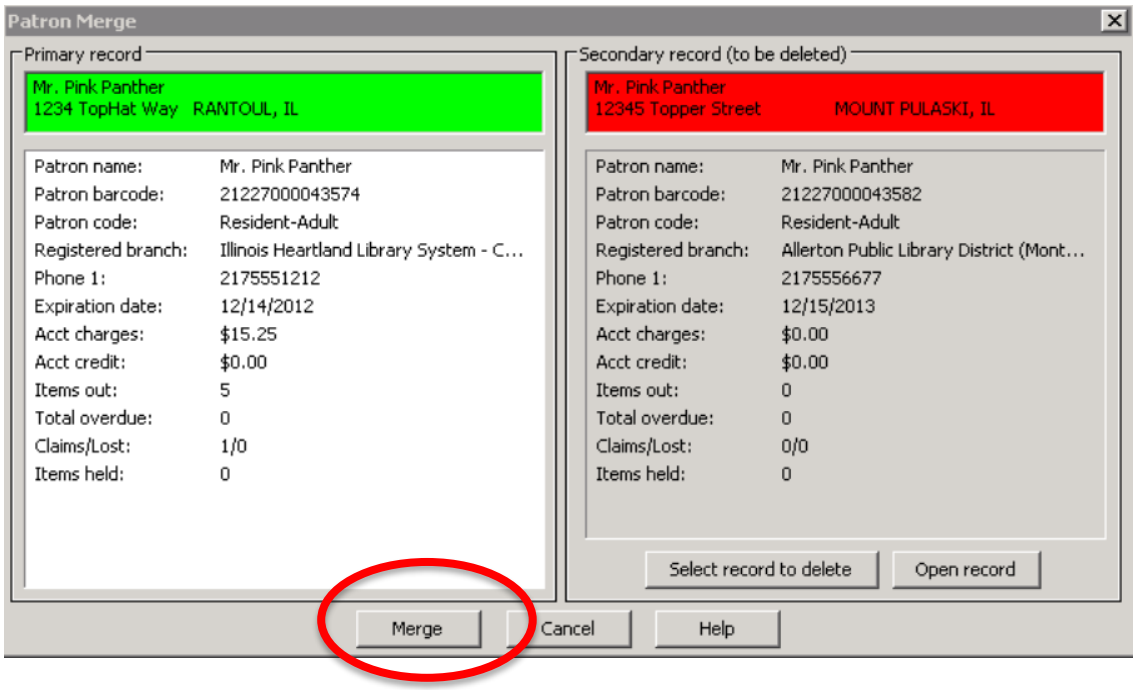
1. Find the primary patron record (surviving record) and open their **Patron Registration** window. Click **Tools, Merge with Patron** on the Shortcut Bar.



2. The Patron Merge dialog box appears showing the Primary record information.

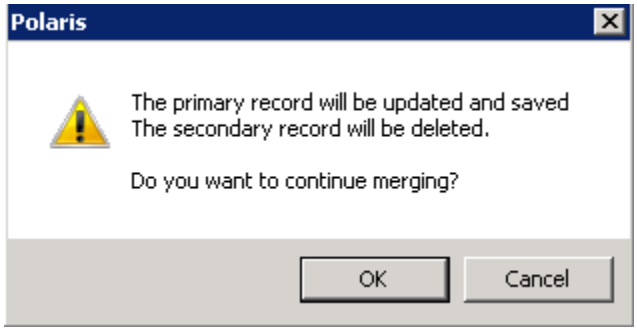


3. Click on **[Select record to delete].** The **Find Tool** window opens. Search for the appropriate record. Double-click on the secondary patron record to add it to the **Patron Merge** dialog box.



4. You will have an opportunity to review the record. When you are sure, click the **[Merge]** button.

5. Again, you are given an opportunity to stop this process.



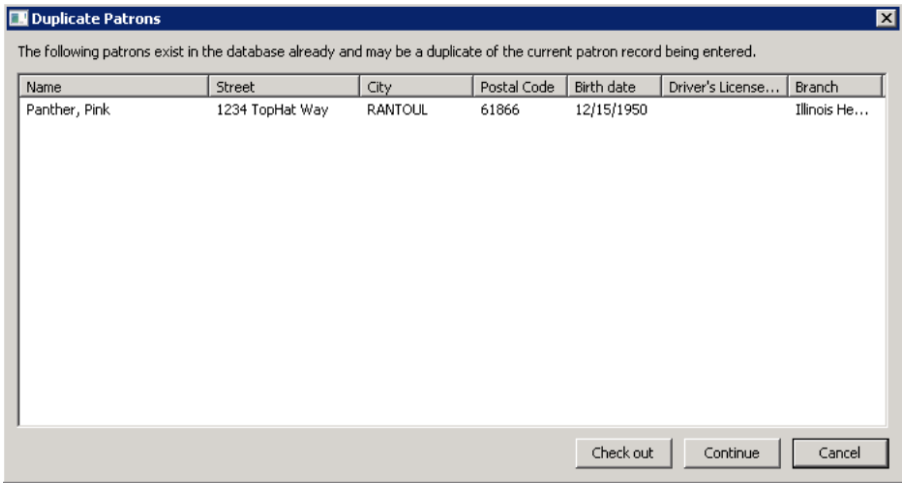
6. Once, you click **[OK],** the secondary record is deleted from the SHARE database. Any items out, holds, fines, etc. from the secondary record are transferred to the primary record. User-defined fields in the primary record will remain unchanged. The barcode from the secondary record is transferred to the former barcode field of the primary record. Year-to-date and lifetime use counts of the secondary record are added to those of the primary record. For more information about the effects of merging patron records, go to Appendix B.

Express Registration

Express Registration is available from the **Check Out** workform. When the Express Registration icon  is clicked a blank Patron Registration workform appears. This is a quick and easy way to register a new user through the CKO window.

Patron Duplicate Detection

Polaris uses the barcode, patron name, address and registered library fields to check for suspected duplicate patrons.

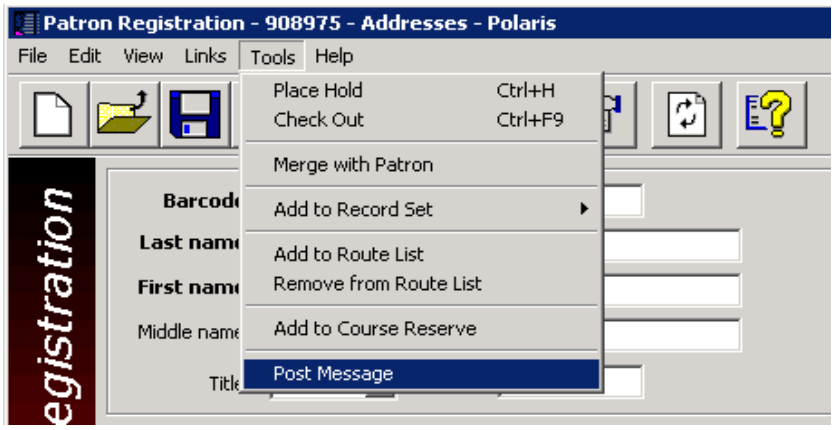


This is not a guarantee that your patron doesn't already exist in the system, but it can be very useful. Patron duplicate detection appears during Express Registration as well as regular Patron Registration.

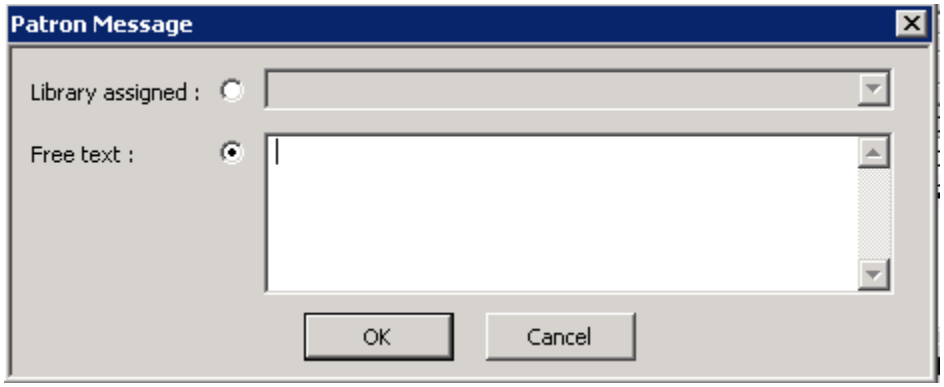
Post a Message from a Patron Registration Record

Posted messages appear on a patron's account record in the PAC.

1. On a Patron Registration Record, click **Tools, Post Message** to access this functionality.



2. Messages can be selected from a predefined list or a free text message may be entered. Click **[OK]** to post the message to the patron's account in the PAC.



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 that parents can check out their own items, and then quickly renew items or pay fines for their children.

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.

Important: Associated patron records remain individual records. If a notice is generated for a single patron record, notices *are not* generated for associated records. 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.

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.

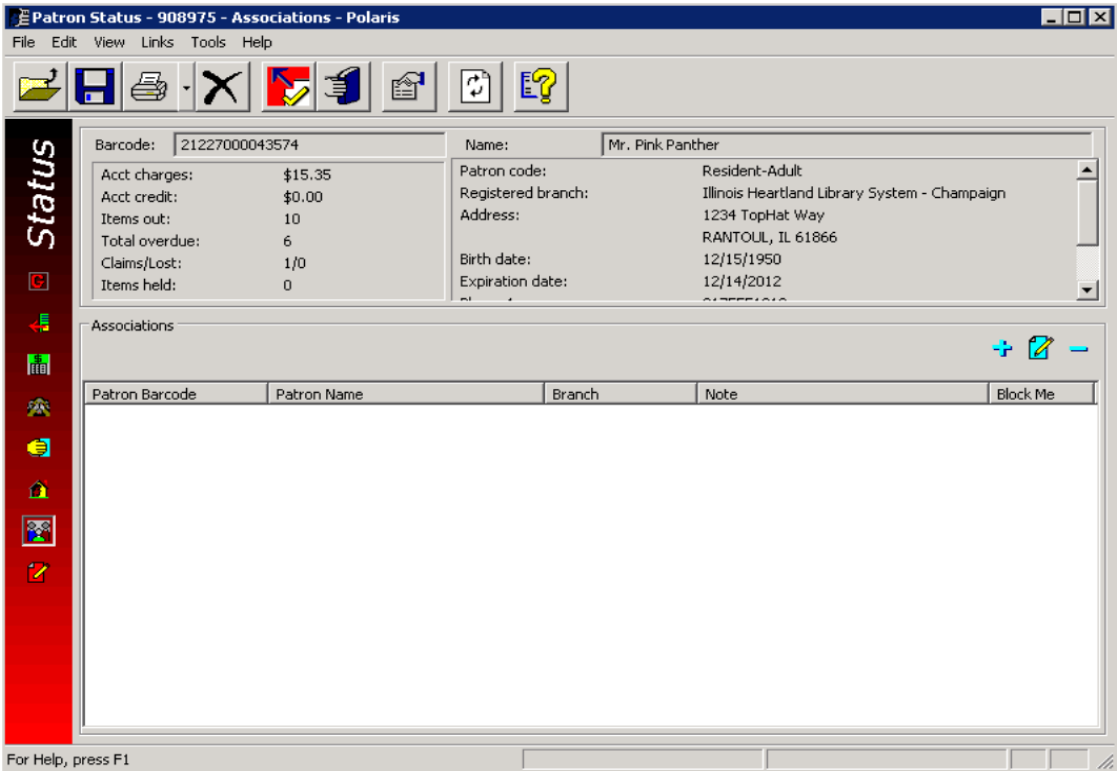
- One primary record may be linked to multiple secondary records. If any of the secondary records is blocked, the primary record is blocked.
- One secondary record may be linked to multiple primary records. If the secondary record is blocked, all the linked primary records are blocked.
- Two primary records may be linked to each other. If either is blocked, the other is blocked.
- Block checking is only one level deep. For example, Primary A and Primary C are linked to Secondary B. If B is blocked A and C will be blocked, because they each are one link away from B. But A will not be blocked if C is blocked.

Create and Edit Patron Associations

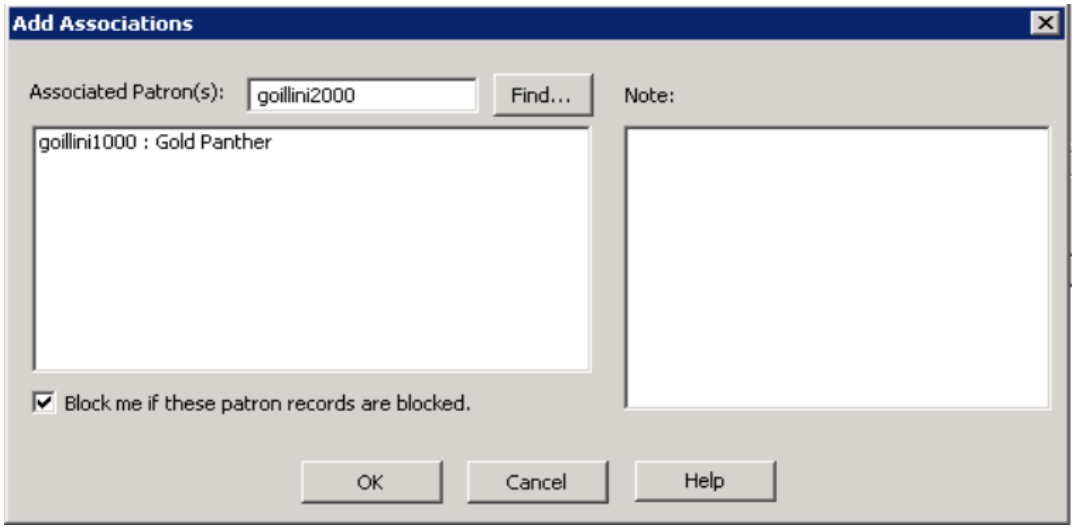
Follow these steps to create and edit an association between patron records.

1. Display the patron's record in the Patron Status workform.

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 Find Tool and search for the patron's record. Right-click the record in the results list and choose Select from the context menu. The patron's barcode appears in the **Associated Patron(s)** box.

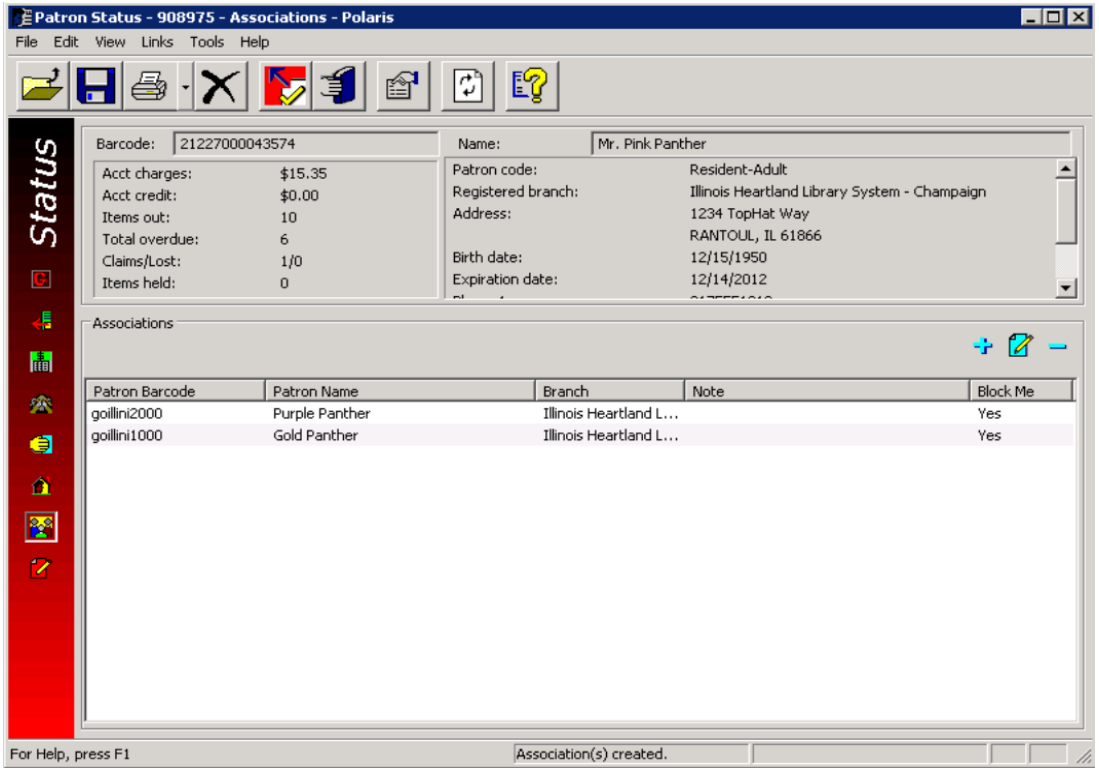
5. If you want to add more associations to the record, repeat the previous step until all the patron barcodes have been entered.

6. If you want to enter a note, type the text in the **Note** box. Make sure that your note is clear. The same text appears on both records. "Mother" is ambiguous note because it appears on the parent's record and the child's record. "Jane Patron is the mother" is a clearer note.

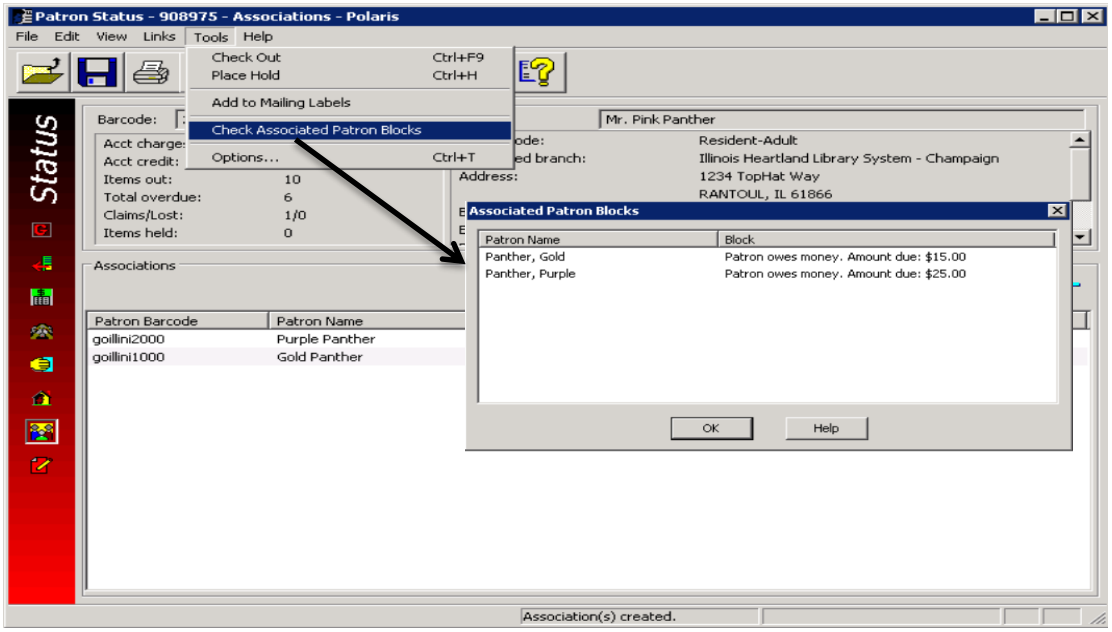
7. Select (check) **Block me if these patron records are blocked** if you want to block this record at checkout or renewal when any of the associated records are blocked.

8. Click **[OK]** to save your settings. The Associations view appears with the additional patrons in the Association 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 has a yellow background. 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.



Deletion of an Association

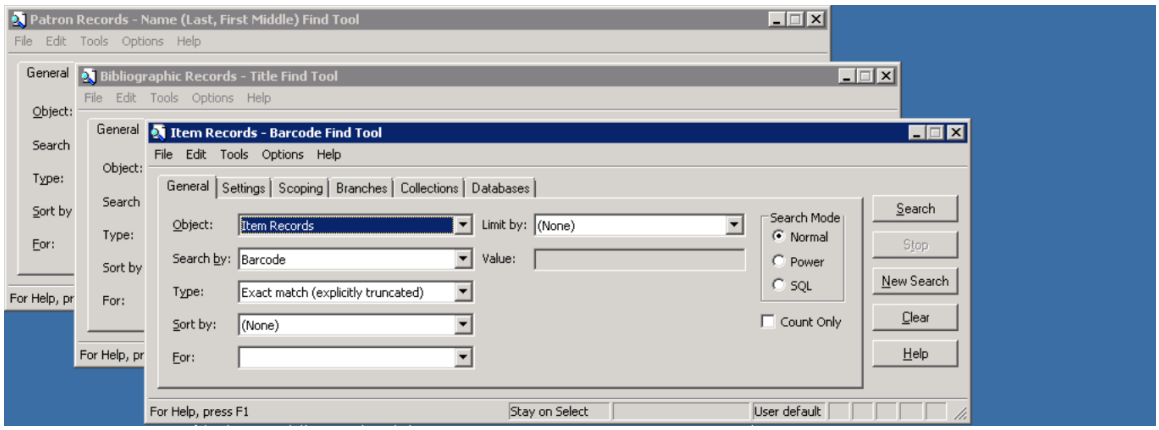
When you delete an association, you are deleting the relationship between the two records, not the records themselves. Select the patron association or associations that you want to delete in the **Associations** list, and click (or press CTRL+D). The association no longer appears in the Associations list.

FIND TOOL FOR PATRONS

- **Types of Searches**
- **Find Tool Tabs**
- **Searching for Patron 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.



Find Tool Tabs

In this manual, the discussion will be specifically about searching for patron records. Each **Find Tool** window has the following tabs:

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 allows you to set up a Record Set and change your Result Set.

Scoping, Branches, Collections and Databases Tabs

None of these tabs are available when performing searches for patrons.

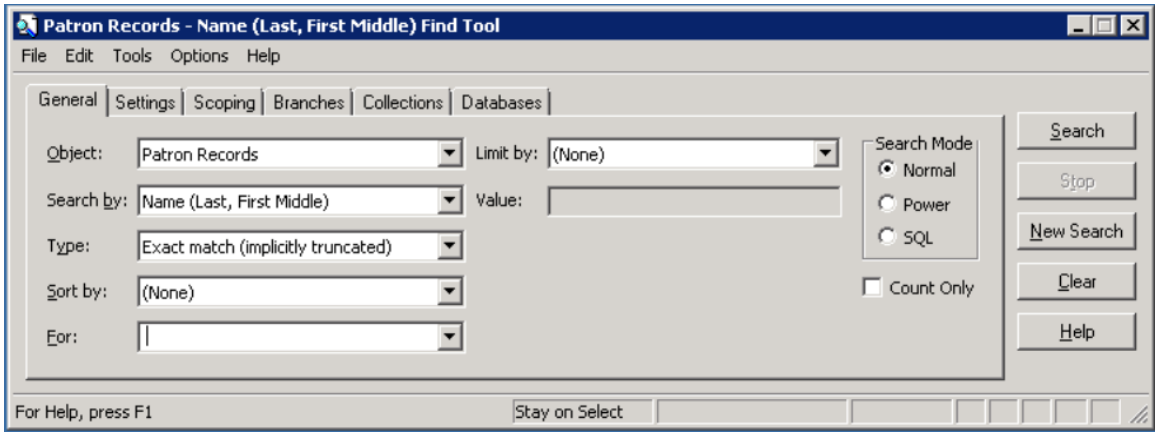
Additional Find Tool Searches

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.

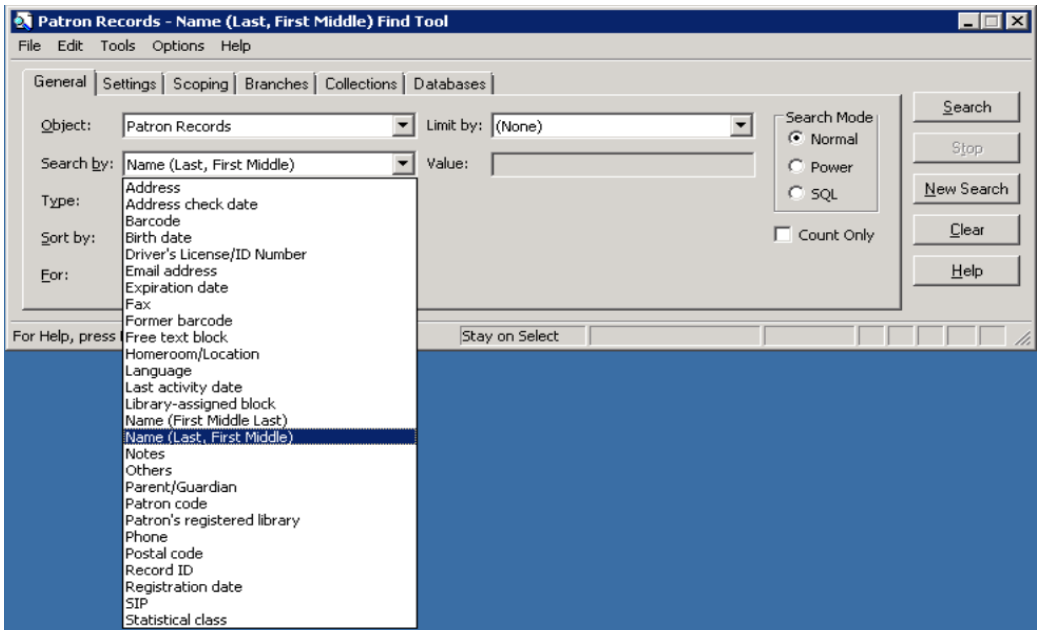
Searching for Patron Records

After opening the Patron Status workform window by either selecting **Circulation, Patron Status**, ***or*** clicking  ***or*** pressing F6, the following window will appear:



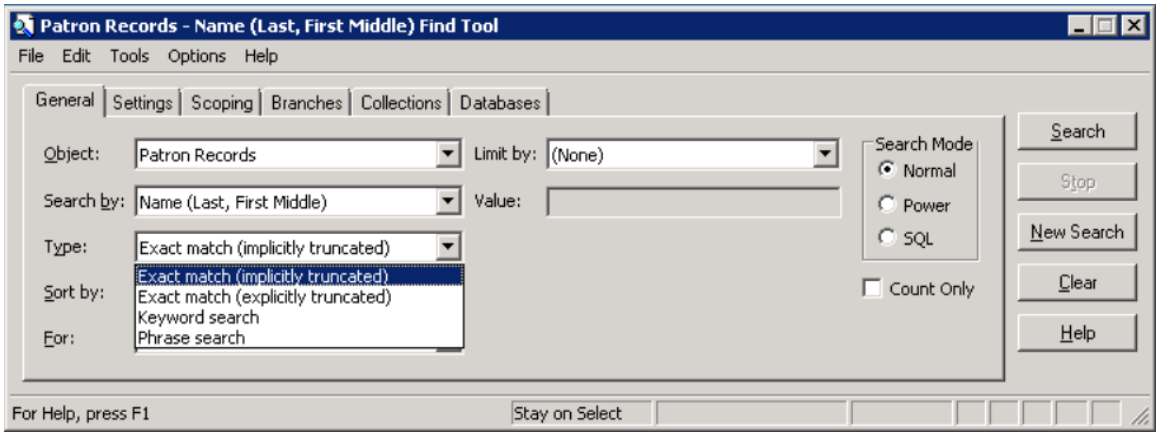
The General tab on the Patron Records workform defaults to settings customized by the individual user. Users may define custom search defaults on any General tab of each Find Tool.

You can search for patrons by a variety of fields. Three of the most popular would be Barcode, Name (Last, First Middle) and Homeroom/Location.



For patron searches the type of search can be one of the following:

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



The Limit By drop down menu allows you to limit the patron records. Use the field **Patron's Registered Library** and then select your building or buildings in the value list to find only your library's patrons.

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., last name 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 asterisk after the search term(s), the results are the same as they would be on an implicitly truncated search. Explicitly truncated searches are not very helpful when searching for patrons.

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 patron records by a variety of sort options. A few of the most popular would be barcode, library, name, or postal code.

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 Homeroom/Location, Patron Code, or Patron's Registered Library. 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 Patron Records 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

- gold = gold
- gold* = golden, goldman, goldberg
- *gold = margold, ingold
- *gold* = goldhammer, goldia (first name)

Exact Match – implicitly truncated

- gold = gold, golden, goldman, goldberg
- *gold = adams, goldie; bowman-golden, julie

Search Results

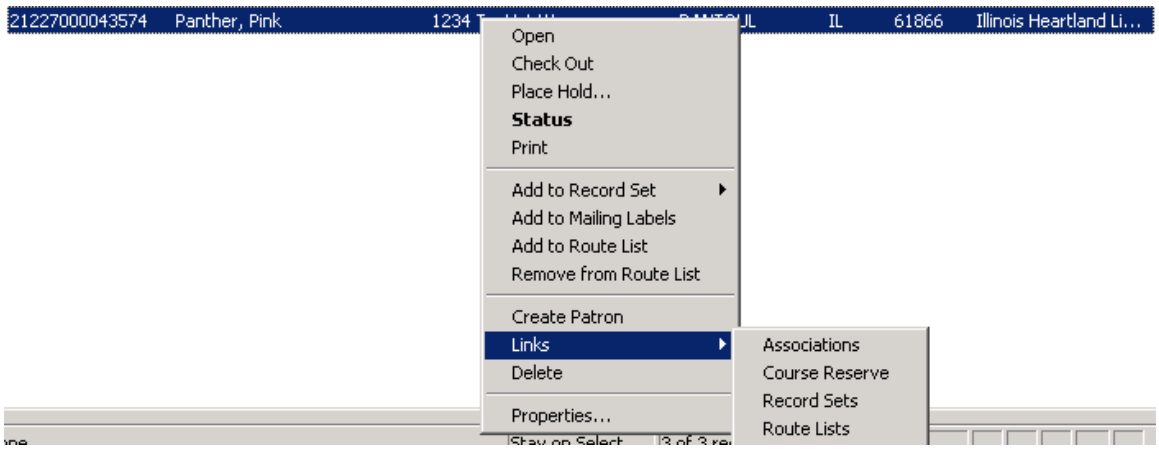
After you have made your selections on the General tab, click the [**Search]** button or press **[Enter]** to perform the search. The search results will display in the lower panel.

Column Headers

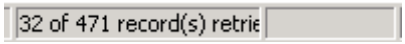
The column headers can be adjusted to reveal or hide more of an individual column. Click and drag between each header to resize the column to your needs. Column headers also provide a quick way to sort your results list. Clicking on a column header sorts the list from A-Z or 0-9999. Clicking again on 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. Staff can quickly send this patron to Check Out, Place a Hold for them, check their Status, add them to a Record Set, or Link them to an Association.



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 (usually 32 records). If you want to see all results, **CTRL+SHIFT+A** will retrieve all the records. Note: To sort records accurately, you must retrieve ALL records from the search.

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; but to see them all use **CTRL+SHIFT+A** to retrieve them to your list.

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.

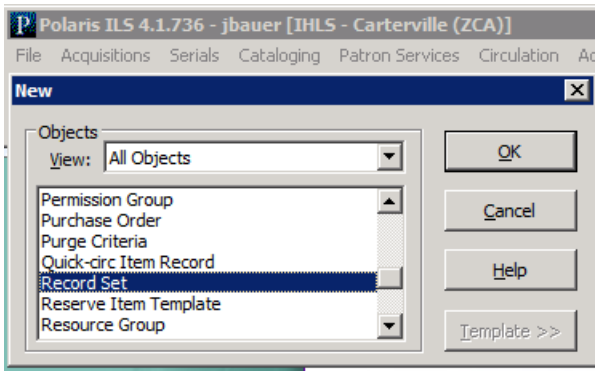
Patron Record Sets

- **Creating a New Record Set**
- **Creating a Patron Record Set Directly from a Result List**
- **Creating a Patron Record Set by Selection**
- **Retrieving Existing Patron Record Sets**
- **Deleting a Patron(s) from a Record Set**
- **Deletion of Record Sets**
- **Bulk Changes to Record Sets**

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

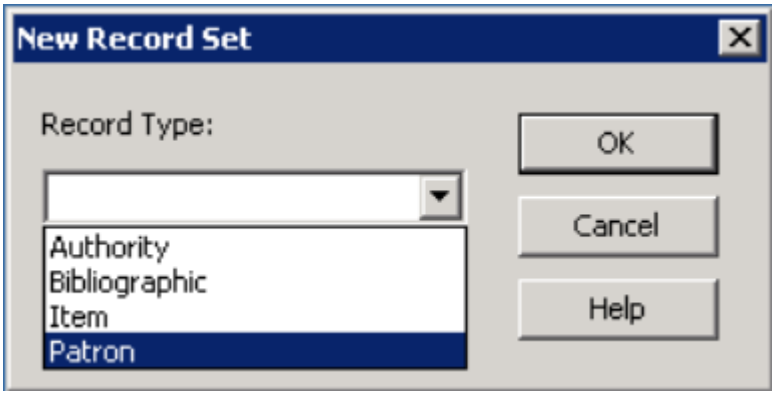
Creating A New Record Set

1. On the main Polaris toolbar, click **New**, or  , or **CTRL+N,** the following window appears:

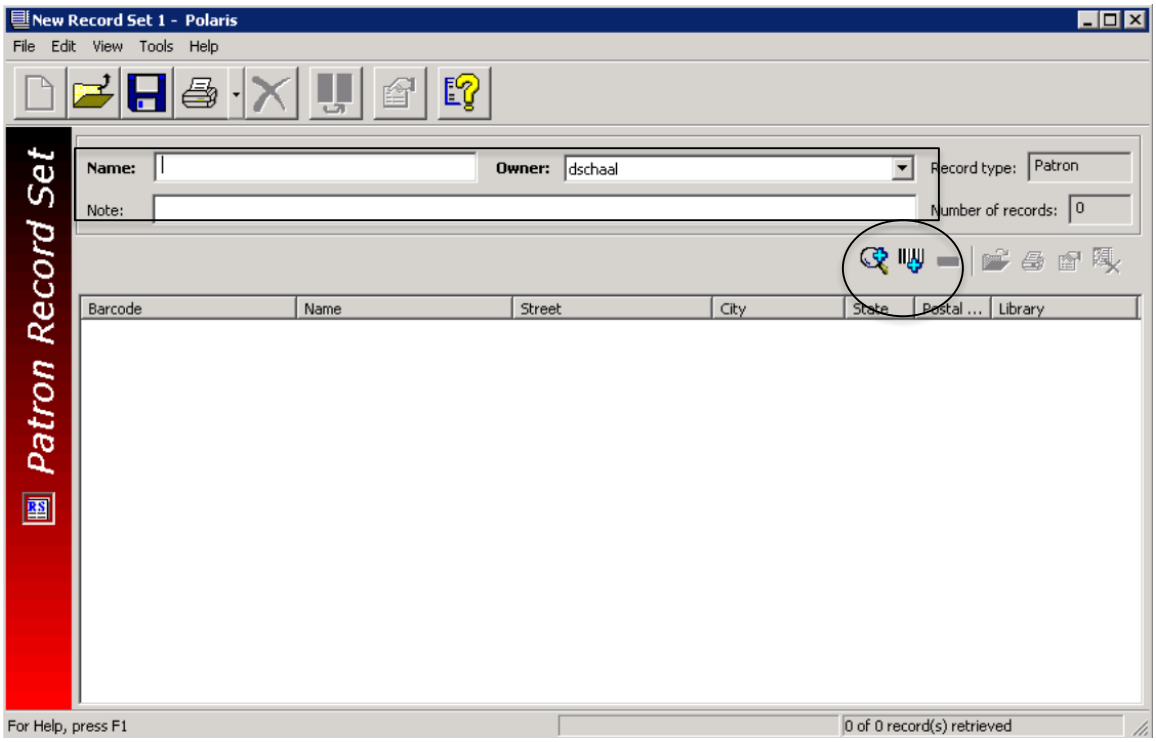


2. Highlight **Record Set**, and then click **[OK].**

3. Choose **Patron** 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.

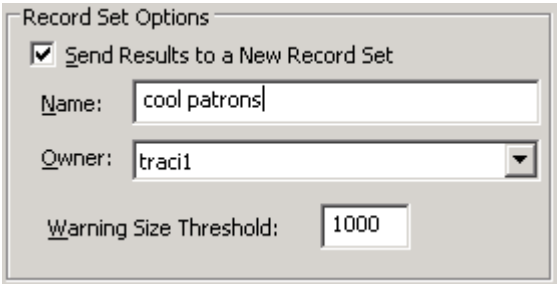
Creating a Patron Record Sets Directly from a Result List

1. Using the **Find Tool,** under **Patron Services, Record Sets,** or **F6** or **F7**, click the **Settings Tab**.

2. Under **Record Set Options**, check the box to **"Send Results to a New Record Set".**

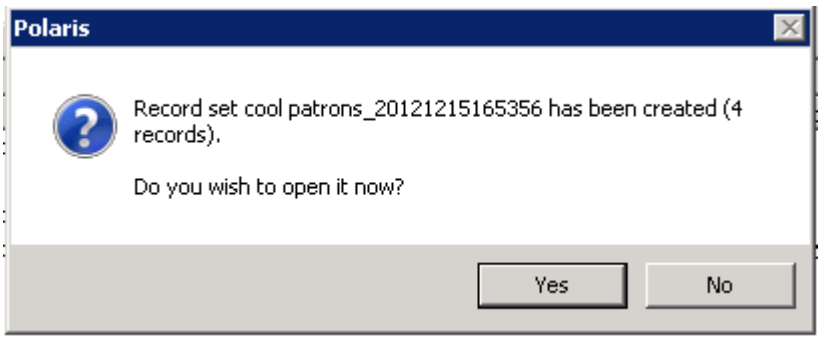
3. The **Name** field will become available. This is a free-text field. Name your Record Set.

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.

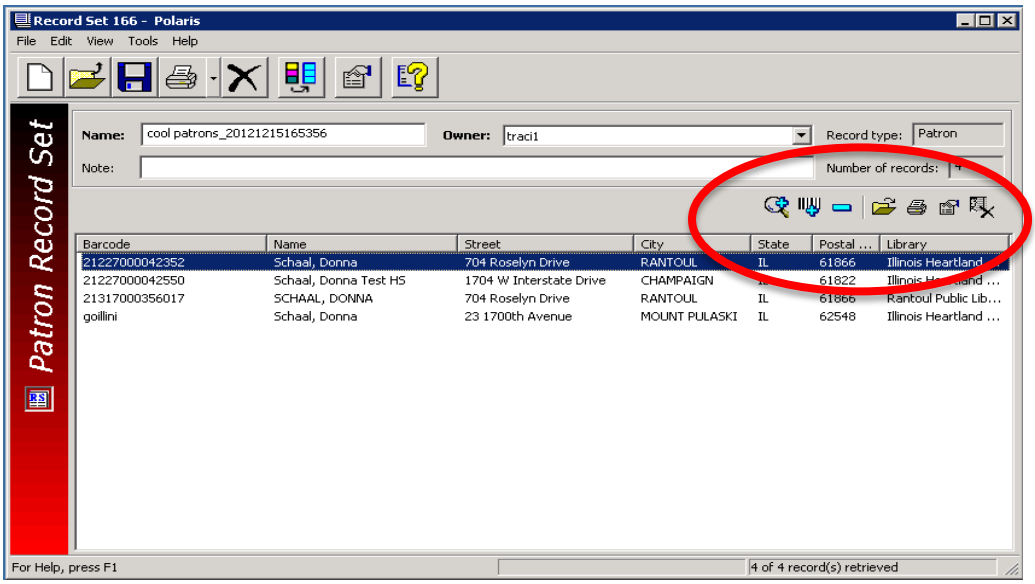


NOTE! SHARE staff strongly recommends that you name your record sets starting with your 4-letter location code. This will make it easier for you to retrieve and for all member libraries to know which list belongs to which individual library.

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:



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

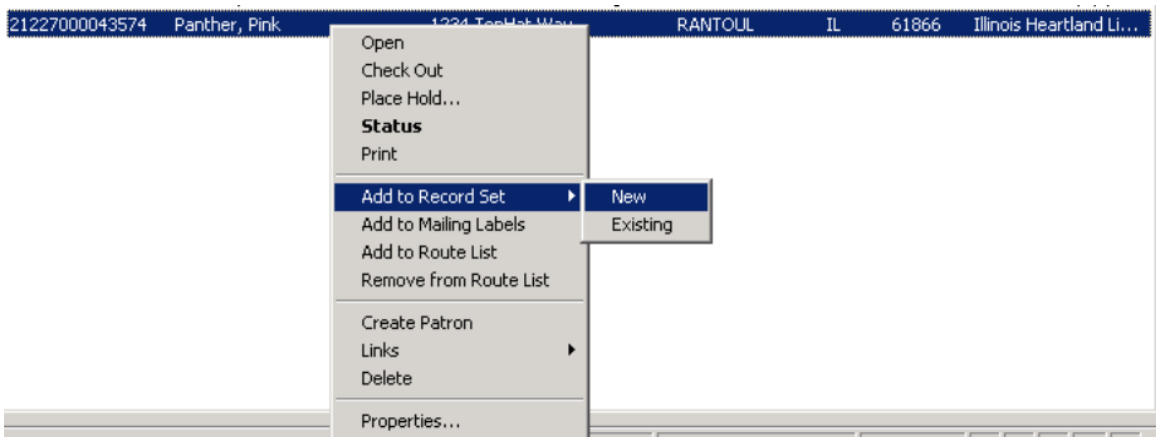


This window shows you the individuals who belong to the Record Set. It gives you another opportunity to change the ownership and to add a note. The Line Item Tool Bar gives you options when working in the Record Set.

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 a patron's Properties, and Delete the Selected Record from SHARE.

Creating a Patron 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 name of a patron; 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 patron to the list.

Retrieving Existing Patron Record Sets

On the main Polaris toolbar, click on **Patron Services, Record Sets**, a **Find Tool** window will appear. Search for your Record Set by name or owner. You can also use the asterisk in the For blank to retrieve "all" of your patron record sets. Double-click on the Record Set to open it up.

Deleting a Patron(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 Change to Record Sets

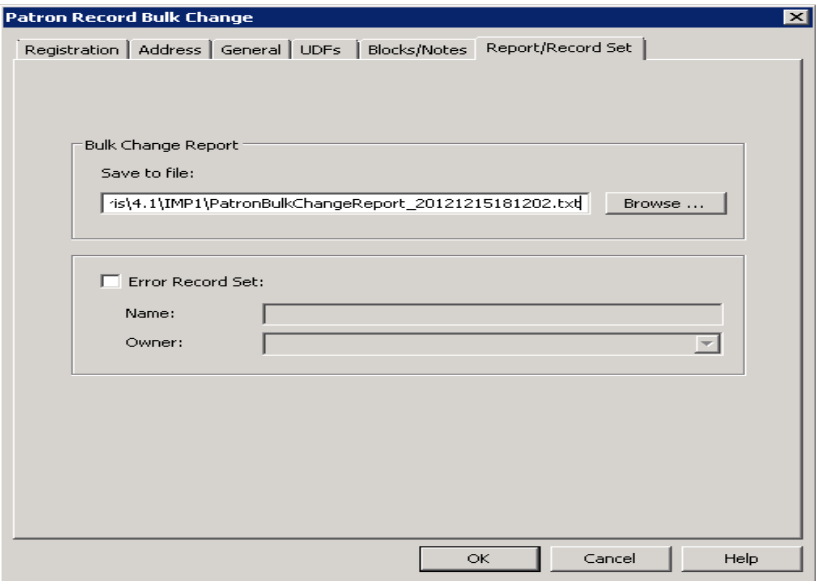
You can make bulk changes to most fields on the Patron Registration workform, as well as the free-text and library-assigned blocks and notes fields on the Patron Status workform. More than one field may be changed in a single bulk change operation. You specify what changes to make to the selected fields, and the same changes are applied to the selected fields in all the records in the Record Set.

1. Retrieve a Patron Record Set workform.

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

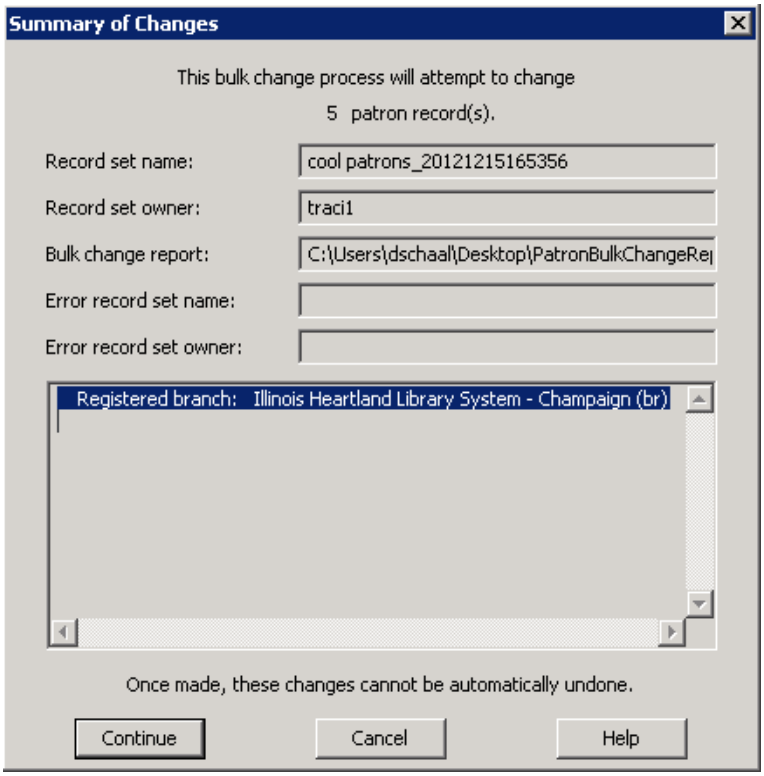
3. Click the tabs for the page that contains the field you want to change. The tabbed pages correspond to areas on the **Patron Registration** and **Patron Status** workform – Registration, Address, General, UDFs, Blocks/Notes and Report/Record Set.

4. Click **Report/Record Set**. Change the location of the report. <u>Polaris requires a report to be saved</u>. You can pick your desktop or some other hard drive location for the saving of the report.



5. To make the change, 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.

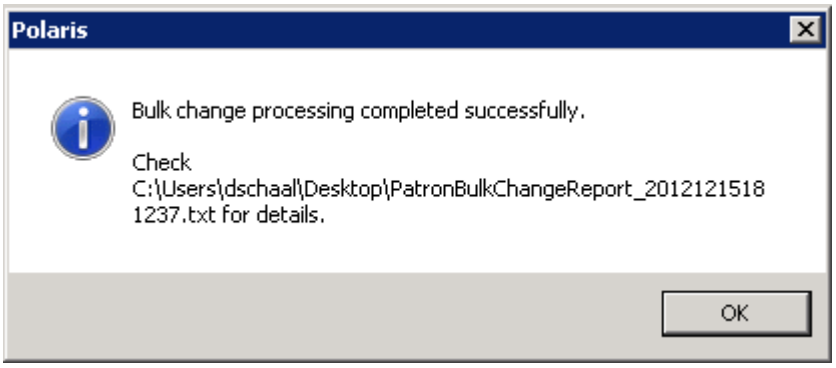
6. Click **[OK]** to start the bulk change process. The **Summary of Changes** will appear:



This gives you an opportunity to stop the change before you continue. If you need to make a correction, click **[Cancel],** go back to the tab and make your change.

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.



9. If you need to, you can view the Bulk Change Report with a text editor or word processor.

APPENDIX A
Patron Services/Circulation Shortcut and Function Keys

General

Workform Help	F1
Find Tool – Patron Registration workform (online only)	F7
Find Tool – Patron Registration workform (from workform)	CTRL+O
Find Tool – Patron Status workform (online only)	F6
Find Tool – Patron Status workform (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 bibliographic record	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 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 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 Patron 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

APPENDIX B
Effects of Merging Patron Records

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

- Registration Data – The primary record's registration data (address, UDF values) remain. The secondary record's exemptions, preferences, 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.
- 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.
- 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, 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. If there are duplicate inactive, active, or pending hold requests, the older one is retained and the other is cancelled. A note is added to the cancelled 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 checkout date. Duplicate titles are not deleted.
- 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.
- 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.