
IHLS
Illinois Heartland
Library System
SHARE
Sharing Heartland's Available Resources Equally
POLARIS
LIBRARY SYSTEMS

Circulation shortcut keys

Help	Check In	Check Out	Refresh	Patron Status	Patron Reg	Property Sheet	Patron Reg/ Patron Status	Bib Find Tool
F1	F2	F3	F5	F6	F7	F8	F9	F12

- F1—Help
- F2—Check in work form
- F3—Check out work form
- F5—Refresh
- F6—Patron Status work form
- F7—Patron Registration work form
- F8—Property sheet
- F9—Switch between Patron Registration and Patron Status work forms
- F12-Find Tool for Bibliographic Records

Hint
F2-'In' has two letters
F3-'Out' has three letters

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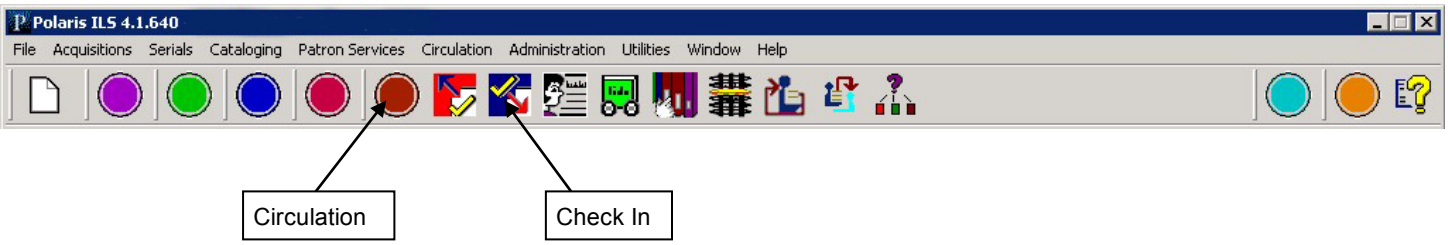
SHORTCUTS

Check In – F2



Regular Check In

1. Select **Circulation > Check In** ***or*** **Click** ***or*** press **F2**.
2. The Check In workform - Normal view appears.
3. Scan item barcode(s).

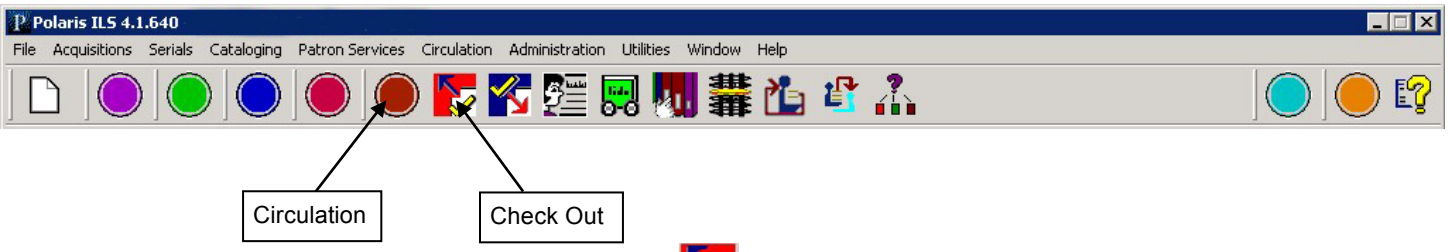
Bulk Check In

2. **Click** on the **button** in the red bar on the ***right*** of the Check In workform ***or***
   Select **View > Bulk Mode**
3. Scan item barcode(s).

Note:
Regular Check In *will force you to deal with fines when the item is checked in.*
Bulk Check In *will automatically charge the patron account without you having to deal with a dialog box.*

CHECK IN

Check Out – F3



1. Select **Circulation > Check Out** ***or*** **Click** ***or*** press **F3.**

2. The Check Out workform - Normal view appears.

3. **Scan** the patron **barcode** in the **Patron barcode** box, ***or*** type the barcode and press **ENTER**.

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

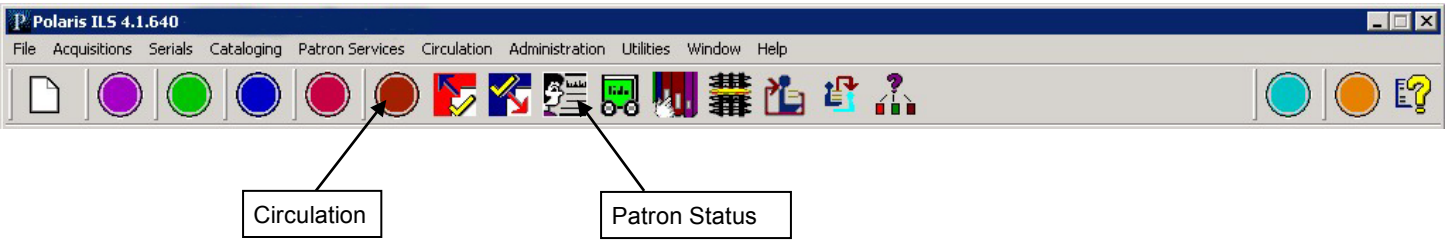
5. When finished, press **ENTER** to **print receipt**.

How to Find a Patron Who Does Not Have Their Library Card

1. Click the **Find** button next to the **Patron name box.** Input name and click the **Search button**.
2. Select the correct patron by **Double clicking** ***or*** **Right click > Select** ***or*** **Clicking the Select button.**

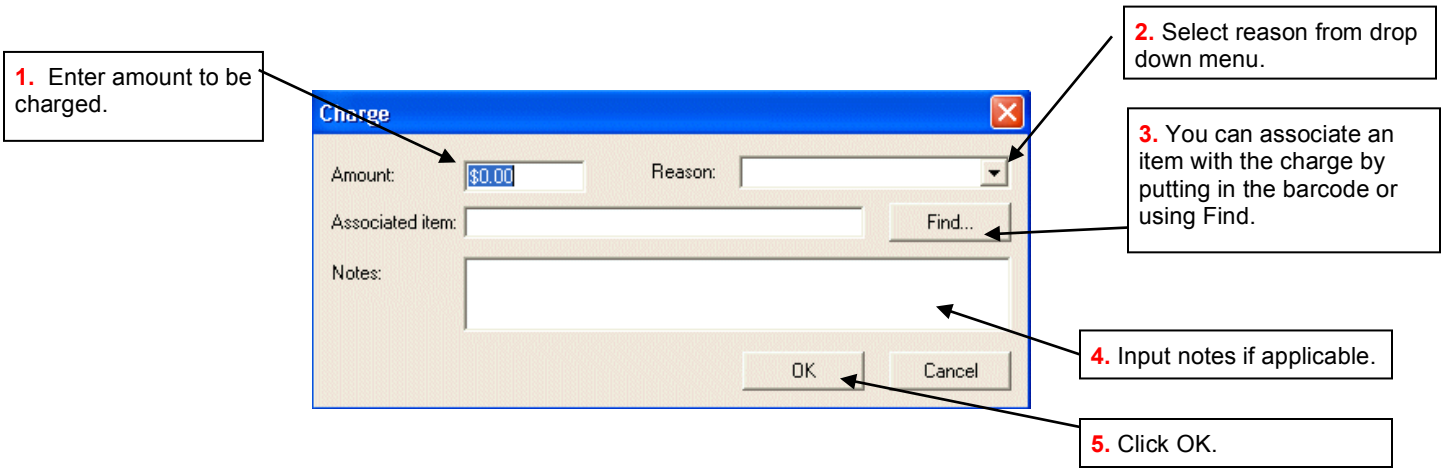
CHECK OUT

Create a Charge on a Patron Account



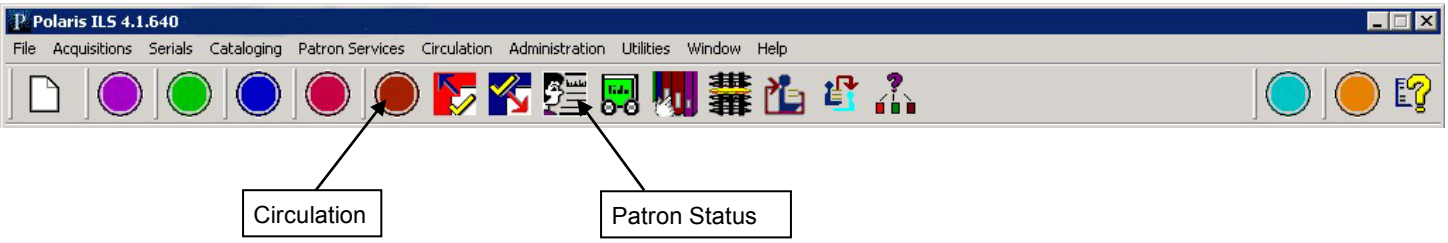
1. Display the patron's record in the Patron Status workform – **Account view >** 

2. Click  above the Account list view, or press **CTRL+C**. The Charge dialog box appears.

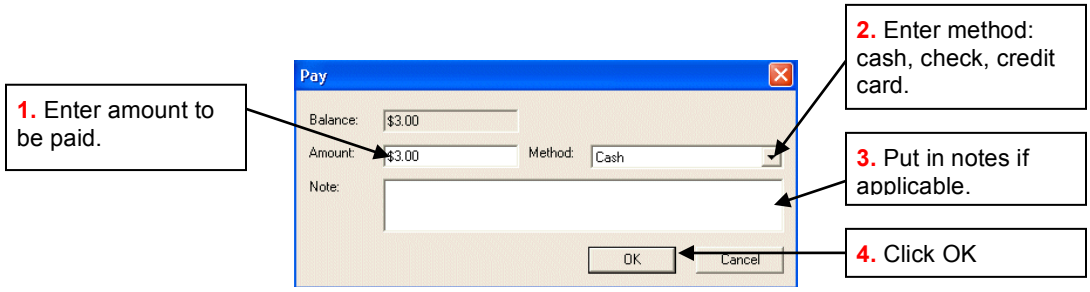


CREATE A CHARGE

Paying Fines



1. Open the Patron Status workform. Select **Circulation > Patron Status** ***or*** press **F6**, ***or*** click
2. Select **View > Account** or click to display the Account view. The List of charges will display.
3. To **pay one or multiple charges**, select the charge or charges in the list, click ***or*** press **CTRL + Y**.
4. To pay **all charges**, click ***or*** press **CTRL+L**.



Place a Hold

You can do a hold from many places. Here are the two most common ways:

From Check Out: Select **Tools >Place Hold** ***or*** click ***or*** press **CTRL + H**

Polaris Shortcut Bar: Select **File > New** ***or*** click Select **Hold Request** in the dialog box.

1. Scan or type the patron's barcode in the **Barcode** box.
2. Make sure the *Pick Up Branch, Activation & Expiration dates* are correct.

Select a title for the hold request:
1. Click **Find** to do a bibliographic or item record search on the holds workform.
2. **Double Click** on the title you want ***or*** **Right-Click** on it, and choose **Select**.
3. **Save** hold by: Select **File > Save** ***or*** click ***or*** press **CTRL + S**

Placing holds on more than 1 title for the same patron
1. After saving the first hold, click on the down arrow next to the **New** page icon
2. Select "**Title"** and proceed as above.

Create an ILL Request

ILL requests start out as holds. Begin by placing a hold:

<u>From Check Out</u>: Select **Tools >Place Hold** ***or*** click ***or*** press **CTRL + H**

<u>Polaris Shortcut Bar</u>: Select **File > New** ***or*** click Select **Hold Request** in the dialog box.

1. Scan or type the patron's barcode in the **Barcode** box.
2. Make sure the *Pick Up Branch, Activation & Expiration dates* are correct.

<u>Unlock the request:</u>

1. Select **Tools >Unlock Request**
2. At the warning message, **click Yes** to continue

<u>Enter title (and other information) for the hold request</u>:

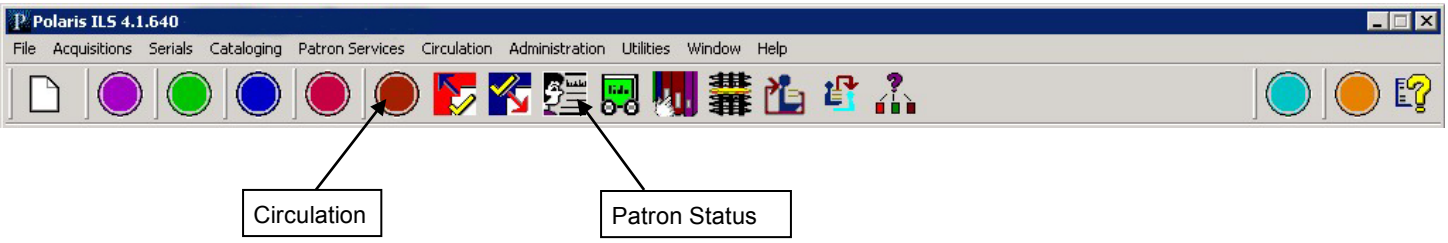
1. Click into the title intake area and type the title on the holds workform.
2. Click into other intake areas to add author, publisher, ISBN or ISSN information if known.
3. **Save** the hold request: Select **File > Save** ***or*** click ***or*** press **CTRL + S**

<u>Converting the hold request to an ILL request:</u>

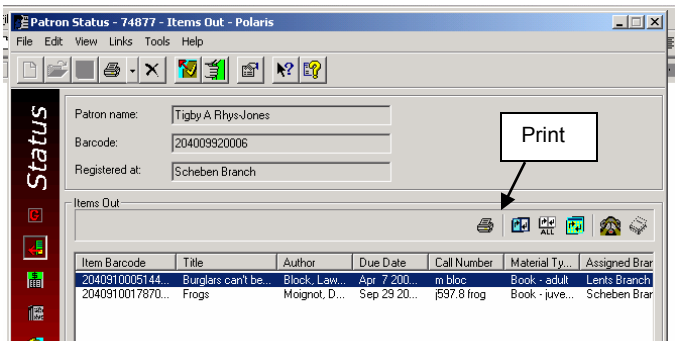
Select **Tools >Convert to ILL Request.**

At the warning message, click **Yes** to complete converting the hold to an ILL request.

Display & Print the Items Out List



1. Open the Patron Status workform. Select **Circulation > Patron Status**, ***or*** click  ***or*** press **F6**
2. Find patron record by barcode, name, etc.
3. To **Print** the **Items Out**, click on the **Printer** Icon above the Items Out list.

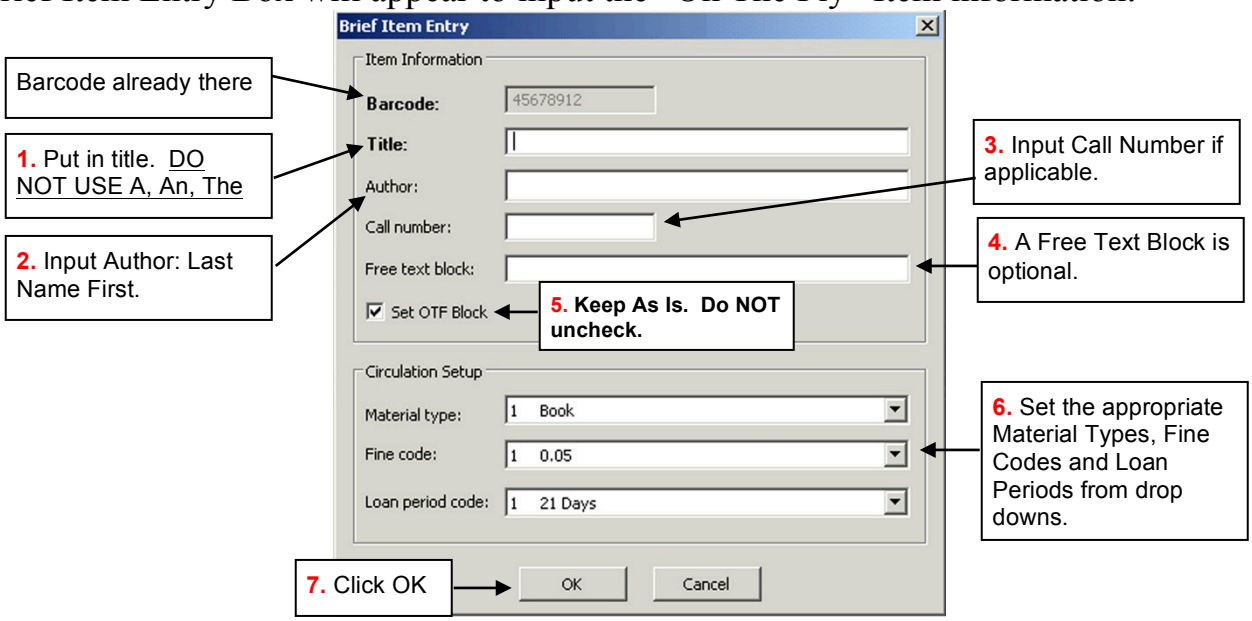


ITEMS OUT

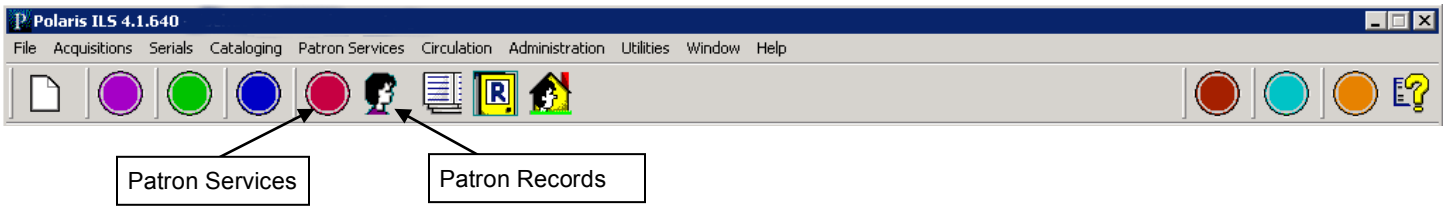
On The Fly Items

1. When Checking Out an Item that is not linked to a catalog record, you will see this message: *"This item is not linked to a record and cannot circulate. Would you like to create a record 'on the fly'?*
2. Click on **"YES".**

3. A Brief Item Entry Box will appear to input the "On The Fly" Item information:



Register A New Patron – F7



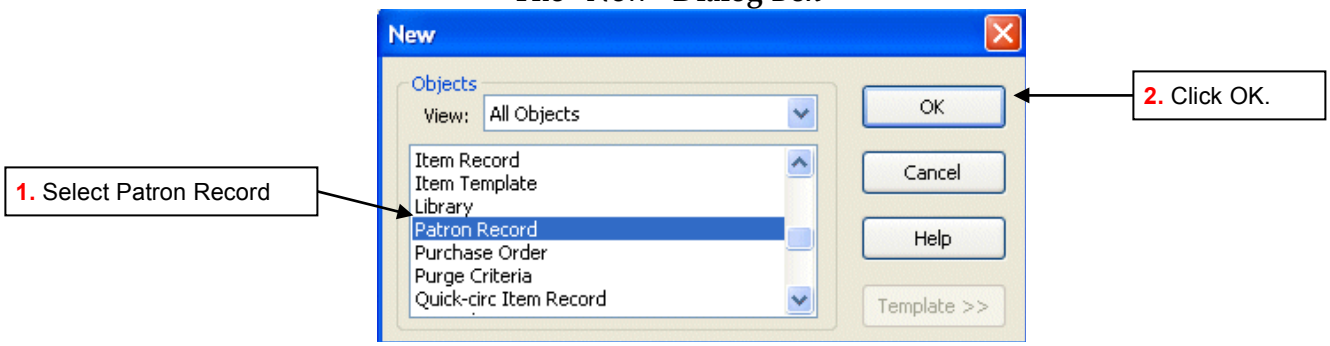
IMPORTANT: Always search for a patron by name using the "Find Tool". They may already have a library card!

The Search: Select **Patron Services > Patron Records**, ***or*** click on  ***or*** press **F7**

To Register a New Patron:

1. Select **File > New**, ***or*** click  , ***or*** press **CTRL+N**.

The "New" Dialog Box



2. Follow SHARE policy for adding a new patron.

REGISTER A NEW PATRON

Renew Items & Change Due Date

Open the patron's record in the **Patron Status** workform.

Renew one or more items: Select the item(s) in the list, click *or* press **CTRL** + **R**

Renew All in the list: Click *or* press **CTRL + A**

Reset Due Date: Select the item(s) in the Items Out list, click , select date from calendar.

RENEW ITEMS & CHANGE DUE DATE