## Circulation shortcut keys

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**Hint**
- F2—'In’ has two letters
- F3—‘Out’ has three letters
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 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**.
Create a Charge on a Patron Account

1. Display the patron’s record in the Patron Status workflow – **Account view** >

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

   1. Enter amount to be charged.
   2. Select reason from drop down menu.
   3. You can associate an item with the charge by putting in the barcode or using Find.
   4. Input notes if applicable.
   5. Click OK.

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.

1. Enter amount to be paid.

2. Enter method: cash, check, credit card.

3. Put in notes if applicable.

4. Click OK.
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:

**From Check Out:** Select Tools > Place Hold *or* click ![Action Icon] *or* press CTRL + H

**Polaris Shortcut Bar:** Select File > New *or* click ![File Icon] 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.

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

**Enter title (and other information) for the hold request:**
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 ![Save Icon] *or* press CTRL + S

**Converting the hold request to an ILL request:**
Select Tools > Convert to ILL Request.
At the warning message, click Yes to complete converting the hold to an ILL request.
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.
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:

   1. Put in title. DO NOT USE A, An, The
   2. Input Author: Last Name First.
   3. Input Call Number if applicable.
   4. A Free Text Block is optional.
   5. Keep As Is. Do NOT uncheck.
   6. Set the appropriate Material Types, Fine Codes and Loan Periods from drop downs.
   7. Click OK
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**

   *1. Select Patron Record*

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.