Polaris: Patron Services & Circulation

Pre-Requisite Videos

* [Leap Navigation and Searching (6 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Leap_Navigation_and_Searching/)
* [Record Sets (5 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Record_Sets/)
* [Standard Reports (5 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Standard_Reports/)
* [Check In & Check Out (3 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Check_In_Check_Out/)
* [Patron Management (3 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Patron_Management/)
* [Creating Holds (3 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Creating_Holds/)
* [Managing Patron Holds (4 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Managing_Holds/)
* [Picklist Processing (2 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Picklist_Processing/)
* [Leap Offline Circulation (5 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Leap_Offline_Circ/)
* [Offline Circulation in the Staff Client (3 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Offline_Circ-Staff_Client/)
* [Blocks (4 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Blocks/)
* [Fines & Fees (3 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Fines_and_Fees/)
* [Notices (3 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Notices/)

# Searching

* Questions?
* User preferences
* Saved Searches

# Patron Creation and Maintenance

* Quick Patron Registration
	+ Focus on customer specific fields
* Copying & deleting patrons
* Merging patron records

# Circulation Functions

* Check Out
	+ Reset a date due
	+ Assign a special loan
	+ Configure patrons for eReceipts
	+ Circulation on-the-fly
* Out/Overdue
	+ Renew
	+ Special renew
	+ Reset due date
	+ Estimate fines
	+ Make a claim
	+ Declare lost
	+ Declare damaged
	+ Notification history
	+ Print list
* Check In
	+ In house
	+ Missing Part
	+ Damaged
	+ Managing items at check in

# Working with Patrons

* Review Account
	+ Manual Fee reasons
	+ Transaction summary
	+ Manual billing
* Claims/Lost
	+ View claimed items
	+ View lost items
	+ Reset claim count
	+ Estimate fines
	+ Notification history
	+ Declare lost

# Patron Information

* Reading history
* Association
* Notices
* ILL (mention only – Separate training)
* Blocks
	+ Review Library Assigned Blocks
	+ Manual Blocks
* Notes

# Holds

* New hold
* Cancel
* Reactivate
* Delete
* Suspend/Reactivate
* Fill now
* Add to group
* Multiple holds
* Holds queue

# Request to fill processing

* Check for questions

# Request Manager

* Overview

# Bulk Waive Fines

* Setting Criteria