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