

Polaris: Patron Services & Circulation

Navigating Leap

- Logging in/out
- Initial screen and settings
- Searching in Leap
 - Quick Search
 - Find Tool
- Records in Leap
 - Patron
 - Bibliographic
 - Item
 - Hold
- Working with multiple records

Patron Creation and Maintenance

- Registering patrons
- Editing a patron record
- 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
 - Normal

- Bulk
- In house
- Missing Part
- Damaged
- Managing items at check in
- Other check in methods
 - From an item
 - From an item record set
 - From patron Out/Overdue

Working with Patrons

- Account
 - Pay
 - Waive charge
 - Add charge
 - Create credit
 - Refund credit
 - Notification history
 - History
 - Properties
 - 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

- Messages
 - Unclaimed
- Blocks
 - Holds to Transfer
- Notes
 - Cancelled

Holds

- New hold
- Multiple holds
- Add to group
- Suspend/Reactivate
- Cancel
- Reactivate
- Delete
- Managing an individual hold
- Holds queue

Request to fill processing

- Picklist
 - Pending list
 - Located list
 - Other processing options
 - Ask Me Later
 - Missing
 - Deny
- Generating other lists

Request Manager

- Overview

Notices

- Overdue
- Bills

Bulk Waive Fines

- Setting Criteria

Record Sets

- Overview
- Creation
- Modify
- Bulk change (items and patrons)
- Bulk change item templates
- Undelete Record Sets

Offline circulation Leap

- Set up
- How to access
- Check out