

Press F3 to bring up the Check Out workflow.

Check Out - 0 - Normal - Polaris

File Edit View Links Tools Help

Patron barcode: Patron name: Find

Acct charges: \$0.00 Patron code:
Acct credit: \$0.00 Expiration date:
Items out: 0 Last activity date:
Total overdue: 0 Registration date:
Claims/Lost: 0 E-mail address:
Items held: 0

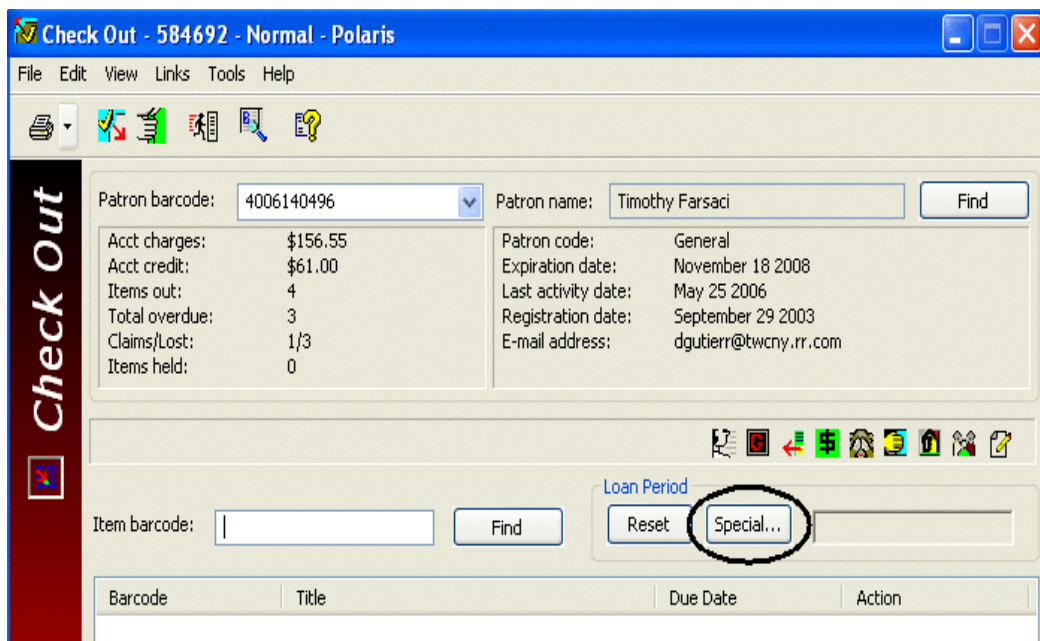
Item barcode: Find Loan Period
Reset Special...

Barcode	Title	Due Date	Action
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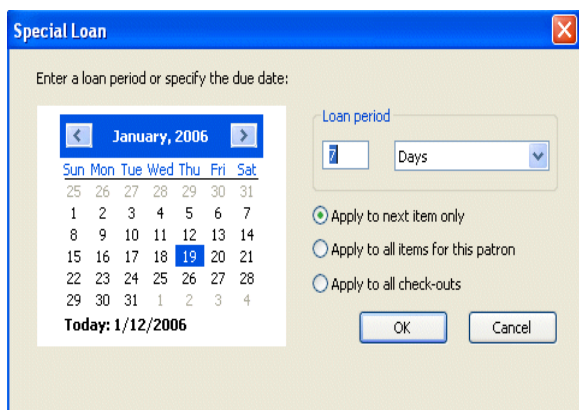
Enter patron information using one of the following methods:

- Scan the patron barcode in the Patron barcode box, or type the barcode and press ENTER.
- Click the Find button next to the Patron name box to display the Polaris Find Tool and search for the patron's record.

If you want to assign a loan period that is different from the standard one, create a special loan period.



- The special loan dialogue box appears. To specify the exact date, select a date on the calendar.
- Choose one of the following options to specify the application of the special loan period:



- To apply the loan period to the patron's next item only, select Apply to next item only.
- To apply the loan period to all the items for this patron, select Apply to all items for this patron.
- To apply the loan period to all items being checked out during the current session, select Apply to all checkouts. If you select this option, the setting remains in effect until you click Reset on the Checkout workflow or close the workflow.
- The special loan period must be set before you scan the affected items. You cannot change the loan period for the transaction once the item barcode is entered.**

Check out Items using one of the following options:

- Scan the item barcode in the Item barcode box, or type the barcode and press ENTER.
- To find an item without the barcode, click the Find button next to the Item barcode box to display the Polaris Find Tool and search for the item record.
- If no item record exists, you can create an interim (on-the-fly) item record at check-out.

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Patron barcode: Patron name: Find

Acct charges: \$0.00
Acct credit: \$0.00
Items out: 0
Total overdue: 0
Claims/Lost: 0
Items held: 0

Patron code:
Expiration date:
Last activity date:
Registration date:
E-mail address:

Item barcode: Find

Loan Period
Reset Special...

Barcode	Title	Due Date	Action
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The item information appears in the list of items checked out.

Repeat the previous step until you have checked out all the patron's items.

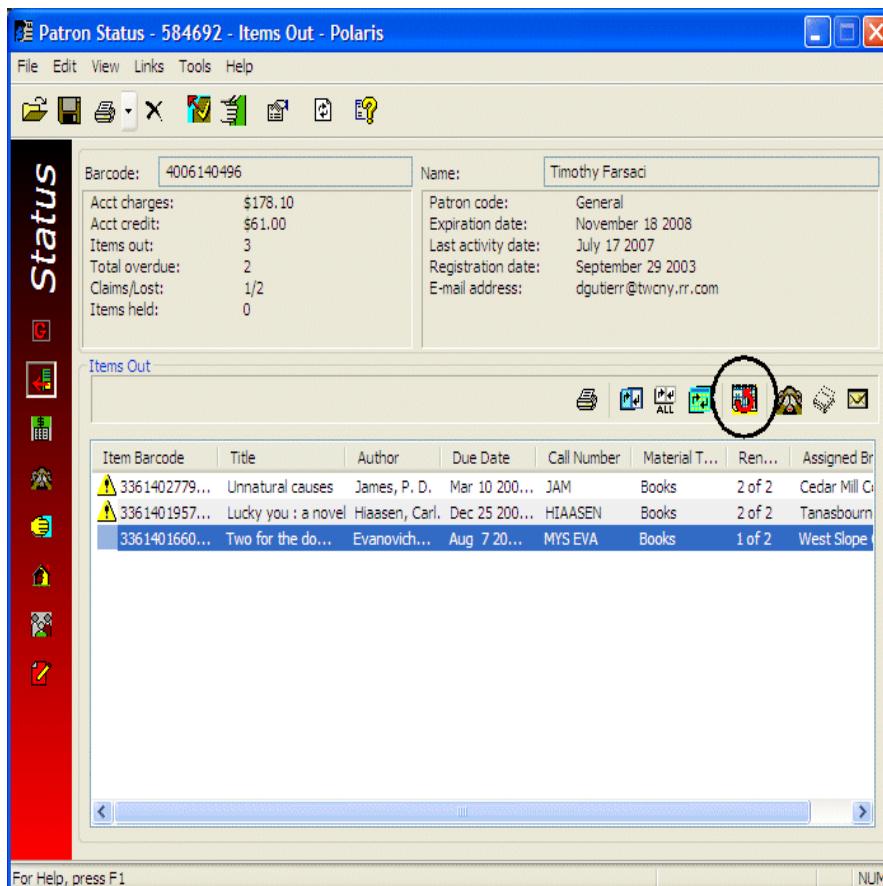
The total number of items checked out appears in the status bar at the bottom of the workform.

Checking items out

Circulation messages - You may see the following messages:

- Item is over the renewal limit - Renew the item anyway, or cancel the renewal.
- The item is already checked out to this patron - Renew the item, or cancel the renewal.
- This item is already checked out to another patron - Check in the item and then check it out to the current patron, or cancel the check-out.
- Item is due at library closing time - Allow the item to circulate overnight, or make the item due at closing time.
- Resolve lost/billed item dialog box - This dialog box appears when an item has been declared lost, but the item is found at circulation.

Reset due dates of checked-out items

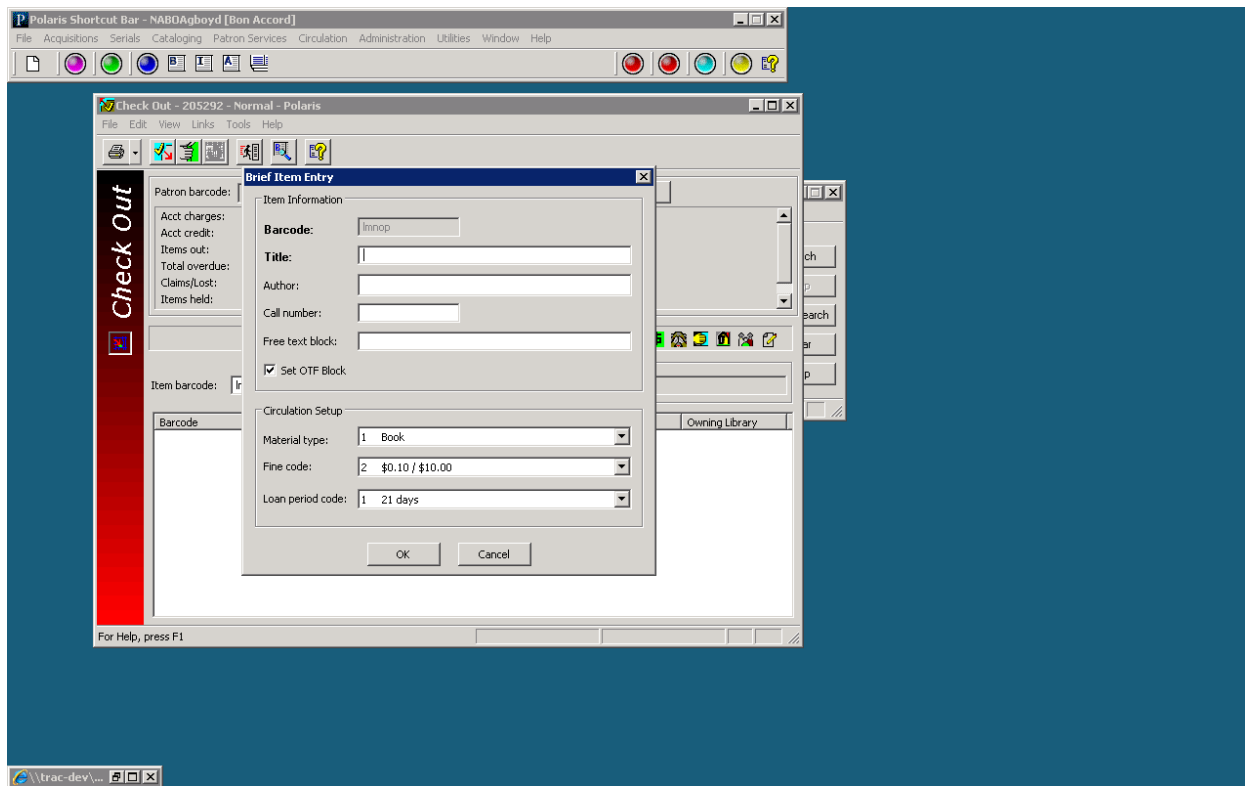


1. Select the item or items in the item list.
2. Check the reset date button in the "Cool Bar"
3. Choose new date from the calendar.

Create an On-the-fly (OTF) item at checkout

On-the-fly (OTF) records can be created to check out barcoded items that are not catalogued.

If you scan a barcode at the Check Out workform, Polaris will prompt you to create an On-the-fly record. Select yes and the Brief Item Entry box will appear.



Enter the bibliographic information required

If you want to type a note, type the information in the free text block, this information will appear in the block window that will appear when the the OTF item is checked in. (Checking in the “Set OTF block” will ensure that the blocking window appears, this is checked by default).

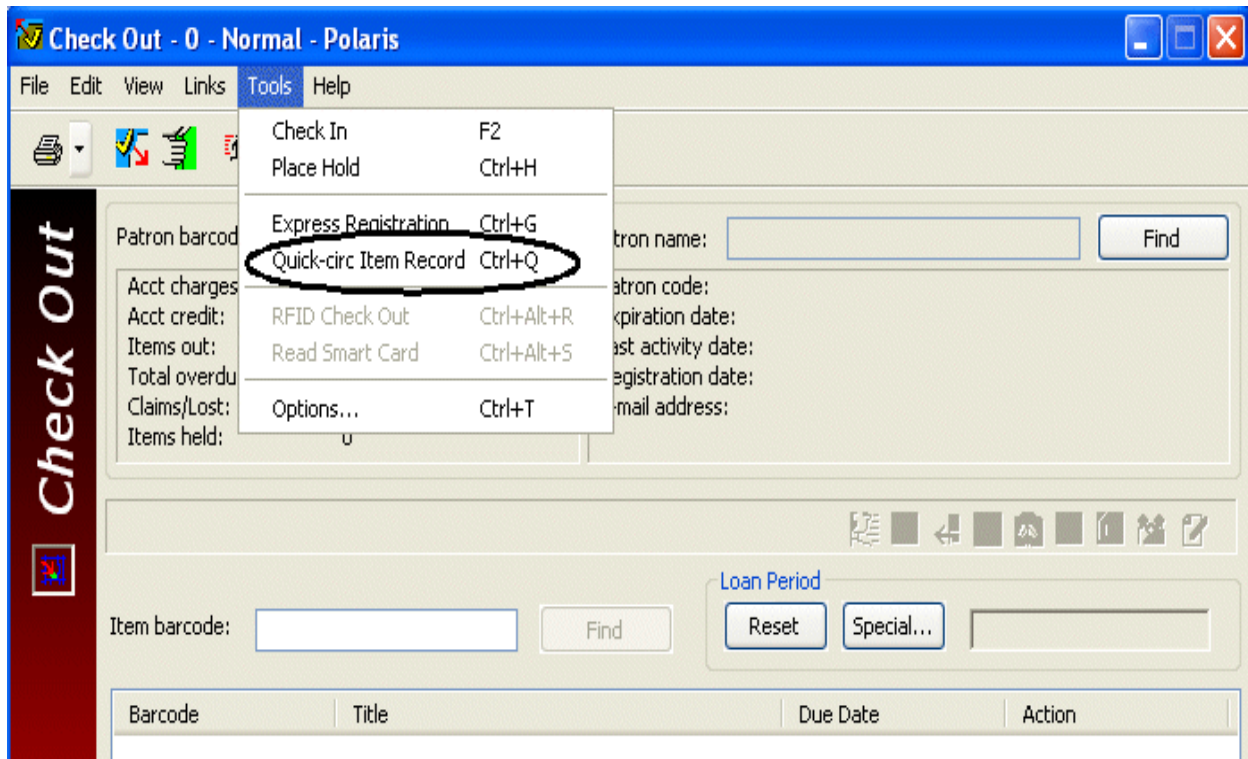
Unlike Fast Adds in Dynix, OTF records do not disappear on check in. The record will remain attached to that barcode until it is deleted by staff at NLLS (this will be done monthly for items with a status of checked in).

Note: When using OTF records to add an out of TRAC ILL – Type ILL before the title and call number. Use the Free text block to indicate what action to take when the book is checked in and ensure that the material type is set to #26- Interlibrary Loan.

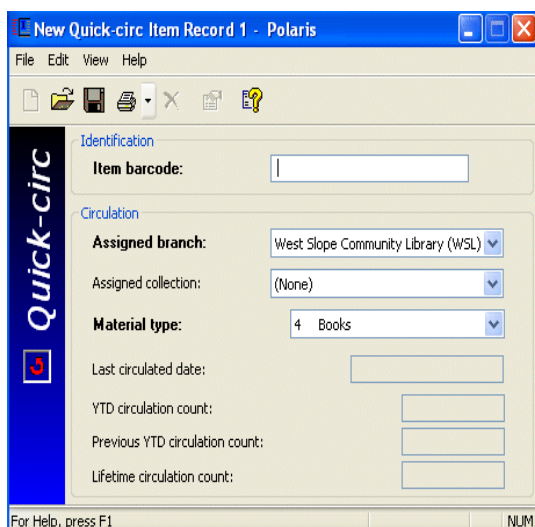
Create a quick-circ item

Quick-circ records can be created to track items in your library that are not intended to be catalogued but for which you want to keep a statistic (e.g. comics, pamphlets, brochures, etc).

- From the Check Out workform, select Tools, Quick-circ Item Record



The Quick-circ Item workform opens.

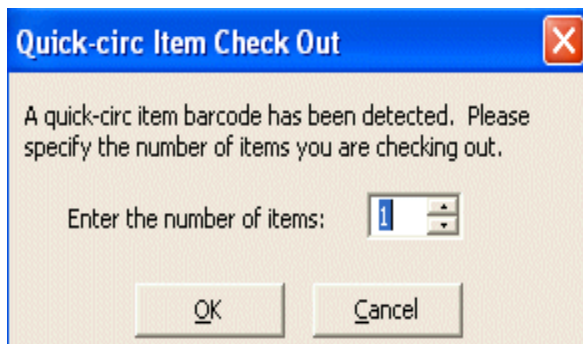


- Scan a barcode or type a free text description that you will remember in the barcode box.
- Select the item's assigned branch, collections, material type.
- Select Save

How to circulate Quick-circ items

Once the Quick-circ record has been created, keep list of barcodes to use when circulating these items.

To check out Quick-circ items, scan barcode or enter free text description exactly as originally entered. The Quick-circ Item Check Out box will appear. Use the arrows or type in the number of items and then click OK.



You can check in Quick-circ items if you wish to track the number of items returned to the library. Quick-circ items do not create a permanent record so if you don't want to keep this statistics, you do not need to check items back in.

Quick-circ Reporting

To ensure that you are always using the same Free text "barcode" for quick circ, and to view Quick-circ stats you can view or print the following:

From the Polaris Shortcut Bar >Utilities > Quick-circ item records.