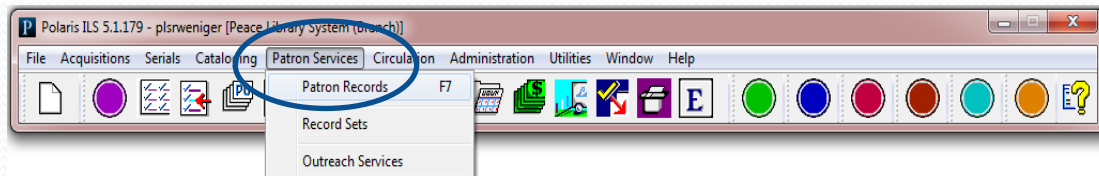


Polaris Patron Renewal

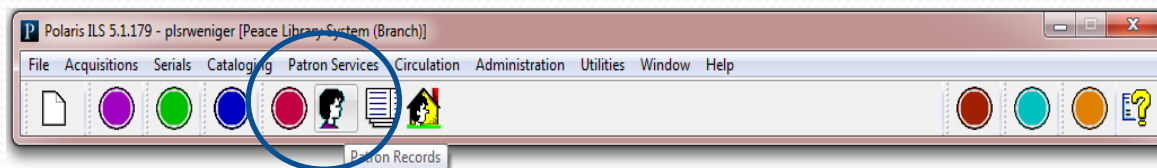


Renewing a Registered Patron

- Login to Polaris and open a “Patron Records Search Tool” (“F7”) or...
- Click on “Patron Services” and then choose “Patron Records” from the alphabetical dropdown list,



- OR, click on the red button to open the “Patron Services” view of the tool bar and click on the “Patron Records” icon.



Renewing a Registered Patron

Searching for your Patron's Registration in Polaris

Patron Records - Name (Last, First Middle) Find Tool

File Edit Tools Options Help

General Settings

Object: Patron Records Limit by: (None) Search Mode: Normal Power SQL

Search by: Name (Last, First Middle) Value: Search

Type: Exact match (implicitly truncated) Stop

Sort by: (None) New Search

For: Clear

Help

Count Only

For Help, press F1 Stay on Select

Patron Records - Name (Last, First Middle) Find Tool

File Edit Tools Options Help

General Settings

Object: Patron Records

Search by: Name (Last, First Middle)

Type: Account charges

Sort by: Address

For: Address check date

Barcode

Birth date

Email address

Expiration date

Fax

Former barcode

Free text block

Language

Last activity date

Library-assigned block

Local Library Statistic #1

Local Library Statistic #2

Local Library Statistic #3

Name (First Middle Last)

Name (Last, First Middle)

Notes

Parent/Guardian (LastName, FirstN

Patron code

Patron's registered library

Phone

Postal code

Record ID

Record set ID

Registration date

Statistical class

Where They Live

1. Click on the down arrow on the second “Search by” field on the General tab of the Find Tool to change the search parameter and search by, for example, patron “Barcode”.
2. Enter the patron name or barcode number in the fifth “For” field and press enter or click on “Search” on the right.
3. If more than one patron has the same name, be sure to select the correct patron from the generated list.

Renewing a Registered Patron

The expiration date on the “Patron Registration Workform” needs to be advanced one year. Click on the down arrow and advance to the correct date by clicking on the arrows.

The screenshot shows the 'Patron Registration - 545513 - Addresses - Polaris' window. The 'Expiration' section is highlighted with a blue box, showing 'Term: 0', 'exact date', and 'Date: 16/04/2017'. A calendar pop-up for April 2017 is open, with the date 16 selected. A blue arrow points from the text above to the calendar. The interface includes a menu bar (File, Edit, View, Links, Tools, Help), a toolbar with icons, and various input fields for patron information.

Barcode: 2010000002489
Registered at: Peace Library System (Branch) (APRPLS)
Last name: Training
Patron code: Adult
First name: Joe
Expiration: Term: 0, exact date, Date: 16/04/2017

Type	Street One	Street Two	City	State	Postal Code
Home	8301 - 110 Street		Grande Prairie	AB	T8V 1C9

Address Check
Term: 0, Date: 16/04/2016

Notices address: Home
Notification option: Mailing Address
eReceipt option: (None)
Email address: JoeTraining@gmail.com

Phone 1: 7805384656
Phone 2:
Phone 3:
FAX number:

For Help, press F1

Renewing a Registered Patron

The “address check” date on the “Patron Registration Workform” needs to be advanced one year. Click on the down arrow and advance to the correct date by clicking on the arrows.

Patron Registration - 545513 - Addresses - Polaris

File Edit View Links Tools Help

Barcode: 2010000002489 Registered at: Peace Library System (Branch) (APRPLS)

Last name: Training Patron code: Adult

First name: Joe

Middle name:

Title: Suffix:

Expiration: Term: 0 exact date Date: 16/04/2017

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Postal Code	County	Country
Home	8301 - 110 Street		Grande Prairie	AB	T8V 1C9		Canada

Address Check

Term: 0 exact date Date: 16/04/2017

Notices address: Home

Notification option: Mailing Address

Additional TXT notice

eReceipt option: (None)

Email address: JoeTraining@gmail.com

Phone 1: 7805384656

Phone 2:

Phone 3:

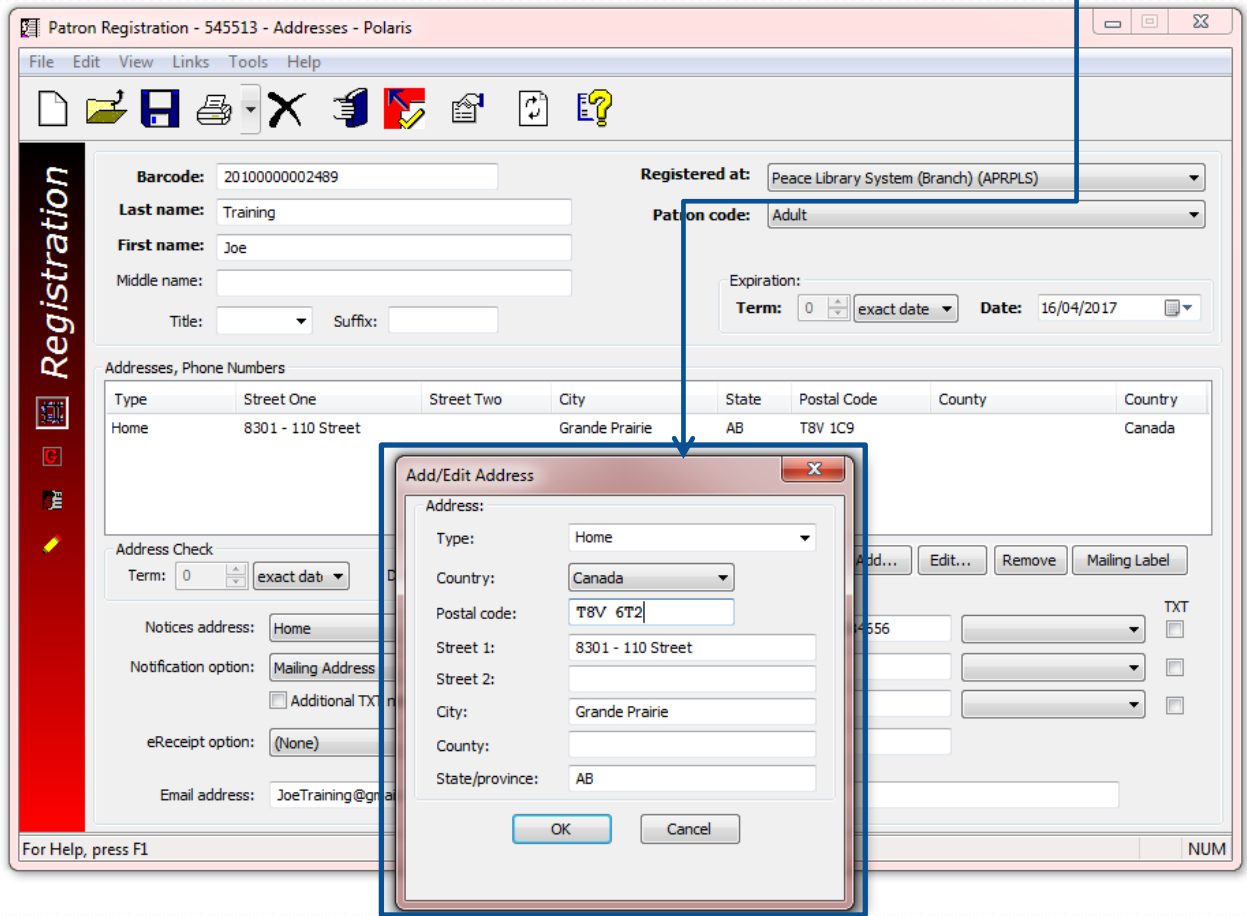
FAX number:

Alt Email address:

For Help, press F1 NUM

Renewing a Registered Patron

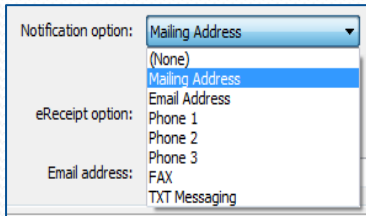
Confirm the Patron's address.
Double click on the address to bring up the edit screen.



Renewing a Registered Patron

Confirm the patron's email address and telephone numbers.
For cell phones, select the carrier from the drop down list and put a check mark in the TXT box.

Encourage the Patron to receive email, text, or phone* messages, rather than the default, by mail.

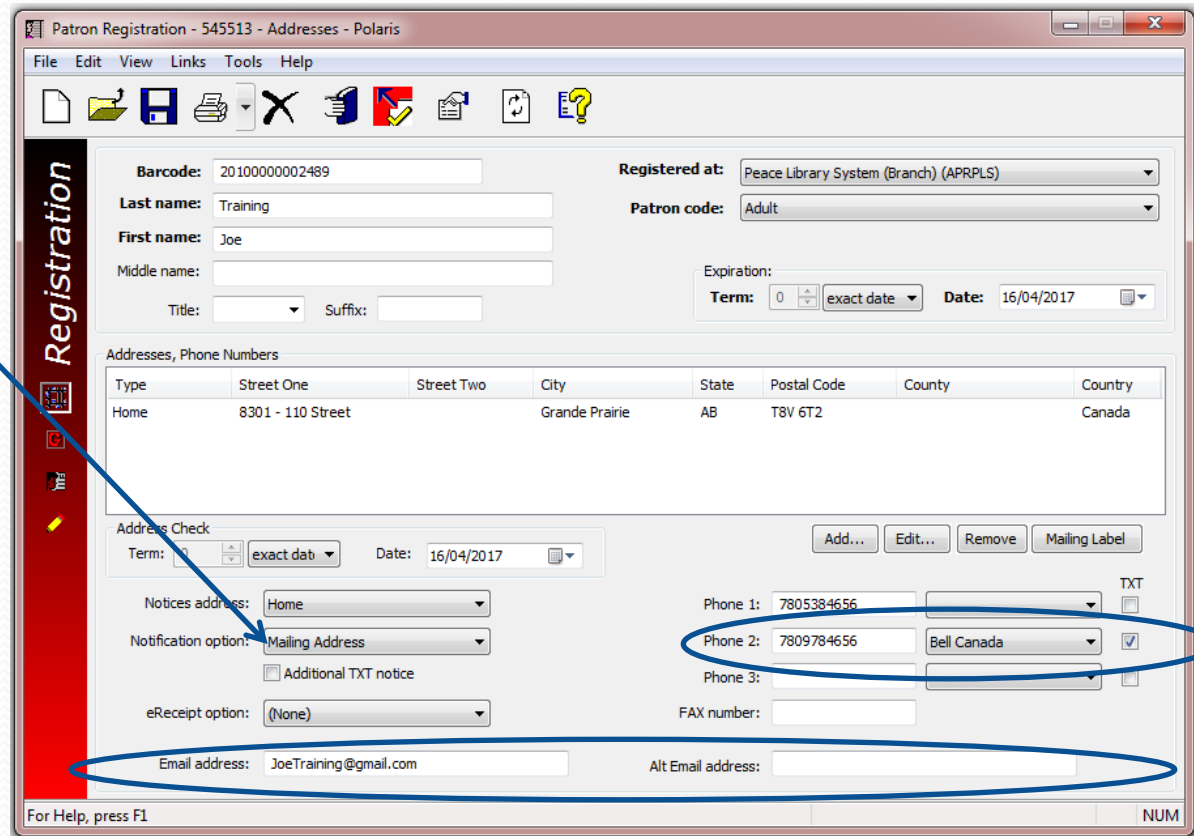


Notification option: Mailing Address
(None)
Mailing Address
Email Address
eReceipt option: Phone 1
Phone 2
Phone 3
Email address: FAX
TXT Messaging

DO NOT select FAX (not enabled.)

Polaris will then email, phone (telephony*) or send text notifications [holds, almost overdues, card almost expired] to patrons.

*Telephony (automated voice messages by telephone) can be set up for your library by the PLS IT manager.



Patron Registration - 545513 - Addresses - Polaris

Barcode: 2010000002489 Registered at: Peace Library System (Branch) (APRPLS)
Last name: Training Patron code: Adult
First name: Joe
Middle name:
Title: Suffix:
Expiration: Term: 0 exact date Date: 16/04/2017

Type	Street One	Street Two	City	State	Postal Code	County	Country
Home	8301 - 110 Street		Grande Prairie	AB	T8V 6T2		Canada

Address Check Term: exact date Date: 16/04/2017 Add... Edit... Remove Mailing Label

Notices address: Home
Notification option: Mailing Address
 Additional TXT notice
eReceipt option: (None)

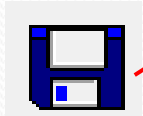
Phone 1: 7805384656
Phone 2: 7809784656 Bell Canada
Phone 3:
FAX number:

Email address: JoeTraining@gmail.com Alt Email address:

For Help, press F1 NUM

Renewing a Registered Patron

Remember
to **Save**
your work!



Polaris will update this registration overnight, but if the patron wants to use their card the same day they renewed it, two further steps are required.

Patron Registration - 545513 - Addresses - Polaris

File Edit View Links Tools Help

Registered at: Peace Library System (Branch) (APRPLS)
Patron code: Adult

Barcode: 2010000002489
Last name: Training
First name: Joe
Middle name:
Title: Suffix:

Expiration:
Term: 0 exact date Date: 16/04/2017

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Postal Code	County	Country
Home	8301 - 110 Street		Grande Prairie	AB	T8V 6T2		Canada

Address Check
Term: 0 exact date Date: 16/04/2017

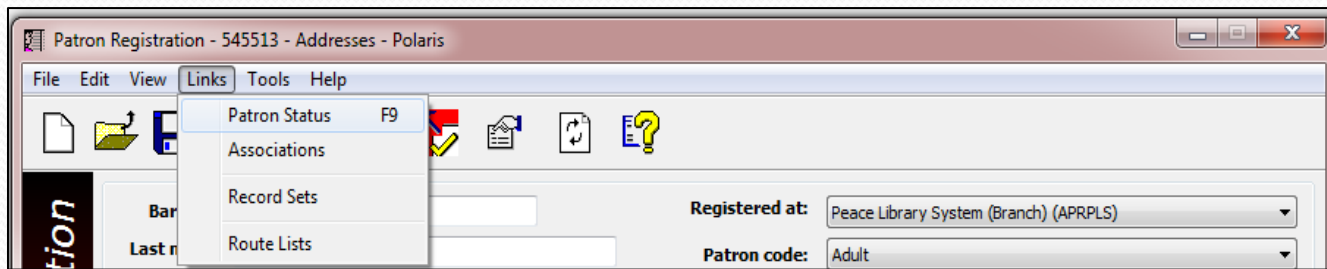
Notices address: Home
Notification option: Email Address
 Additional TXT notice
eReceipt option: (None)
Email address: JoeTraining@gmail.com

Phone 1: 7805384656
Phone 2: 7809784656 Bell Canada
Phone 3:
FAX number:

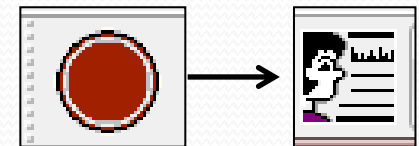
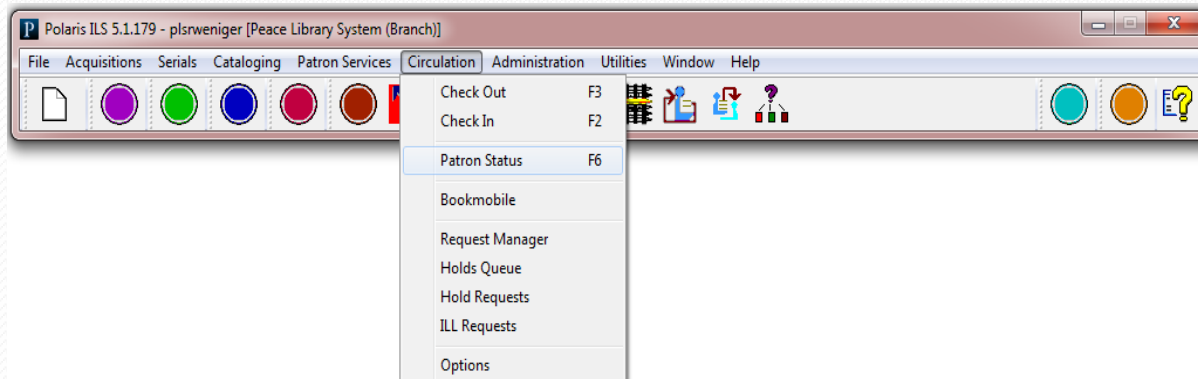
NUM

Renewing a Registered Patron

From the “Patron Registration Workform” click on keyboard function key “F9” OR click on the Links menu option, then on “Patron Status” to link to the “Patron Status Work Form”.

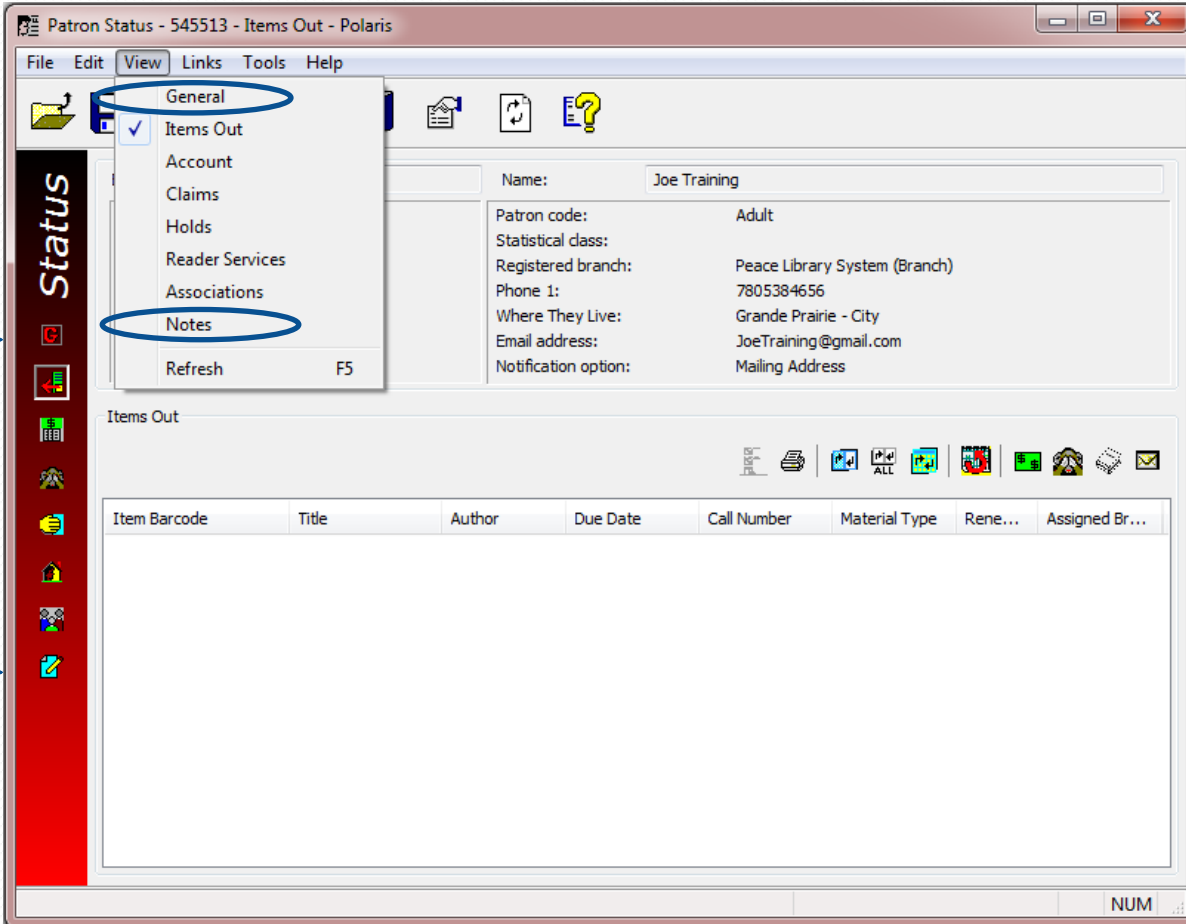


From the Polaris Toolbar, open the “Patron Status Work Form” from the Circulation drop down menu OR click on the Burgundy button, then the “Patron Status” icon.



Renewing a Registered Patron

Two views of the “Patron Status Workform” need to be examined and updated. They can be seen by choosing the “General” view and the “Notes” view from the “View” dropdown menu or by clicking on the first and last banner links.



The screenshot displays the "Patron Status - 545513 - Items Out - Polaris" window. The "View" dropdown menu is open, showing options: General, Items Out (checked), Account, Claims, Holds, Reader Services, Associations, Notes, and Refresh (F5). The "General" and "Notes" options are circled in blue. A red square icon with a white 'G' and a red square icon with a yellow pencil are shown on the left, with blue arrows pointing to the "General" and "Notes" options in the dropdown menu, respectively. The main content area shows patron information for "Joe Training" and an empty "Items Out" table.

Item Barcode	Title	Author	Due Date	Call Number	Material Type	Renew...	Assigned Br...
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Renewing a Registered Patron

On the “General View” of the “Patron Status Workform” the “Blocks” in the lower right corner must be deleted. Click on the blocking text to highlight in blue, then click “Delete” underneath the “Block” box. The first message (Patron has notes) directs you to click on the bottom icon and move to the “Notes View”.

Patron Status - 545513 - General - Polaris

File Edit View Links Tools Help

Barcode: 2010000002489 Name: Joe Training

Acct charges: \$0.00 Patron code: Adult
Acct credit: \$0.00 Statistical class:
Items out: 0 Registered branch: Peace Library System (Branch)
Total overdue: 0 Phone 1: 7805384656
Claims/Lost: 0/0 Where They Live: Grande Prairie - City
Items held: 0 Email address: JoeTraining@gmail.com
Total holds/LL: 0/0 Notification option: Mailing Address

Status

Block

Block

Patron has notes
Address check required
Registration has expired

Add Modify Delete

Notice

Title	Type	Date	Method	Amount
-------	------	------	--------	--------

For Help, press F1 0 of 0 record(s) retrieved

Renewing a Registered Patron

On the “Notes View” of the “Patron Status Workform” various notes may be present. Below, a “Blocking” note is preventing card use, and has caused the “Notes” icon to appear red colored (It is yellow if the “Non-blocking” note field has an entry). Clear up any “Blocking” notes with the patron so they may resume use of their card.

Patron Status - 545513 - Notes - Polaris

File Edit View Links Tools Help

Barcode: 2010000002489 Name: Joe Training

Acct charges:	\$0.00	Patron code:	Adult
Acct credit:	\$0.00	Statistical class:	
Items out:	0	Registered branch:	Peace Library System (Branch)
Total overdue:	0	Phone 1:	7805384656
Claims/Lost:	0/0	Where They Live:	Grande Prairie - City
Items held:	0	Email address:	JoeTraining@gmail.com
Total holds/ILL:	0/0	Notification option:	Mailing Address

Notes

Non-blocking:

Blocking:

This block is here until Joe picks up his driver's license from the library manager.

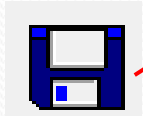
Message Text Patron Has Read

Add Message...
Modify Message...
Delete Message

For Help, press F1 Record Saved

Renewing a Registered Patron

Remember
to **Save**
your work!



Questions?

Call PLS and
talk to a
member of the
consulting
team!

780-538-4656
1-800-422-6875

Patron Registration - 545513 - Addresses - Polaris

File Edit View Links Tools Help

Barcode: 2010000002489 Registered at: Peace Library System (Branch) (APRPLS)

Last name: Training Patron code: Adult

First name: Joe

Middle name:

Title: Suffix:

Expiration: Term: 0 exact date Date: 16/04/2017

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Postal Code	County	Country
Home	8301 - 110 Street		Grande Prairie	AB	T8V 6T2		Canada

Address Check

Term: 0 exact date Date: 16/04/2017

Add... Edit... Remove Mailing Label

Notices address: Home Phone 1: 7805384656

Notification option: Email Address Phone 2: 7809784656 Bell Canada

Additional TXT notice Phone 3:

eReceipt option: (None) FAX number:

Email address: JoeTraining@gmail.com Alt Email address:

For Help, press F1

NUM