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Introduction

Hello and welcome to the MAIN-Polaris training manual. This document serves as a companion during Polaris training sessions and also as a reference guide for those who have already been trained. The manual itself has been divided into sections that are outlined in the Table of Contents. Hyperlinks have been included for your convenience which will bring you to the area of the document you would like to view once clicked. Appendices, and an index (also hyperlinked) are provided at the end of the document.

What is an ILS?

An integrated library system (ILS) is at its core a dual-facing system which allows:

A.) library personnel to maintain an inventory database and
B.) library patrons to access the inventoried materials.

The accuracy of the ILS is extremely important. If certain items are misclassified or simply not entered into the system at all, patrons will not be able to find the items and there will be no way to track usage or gather statistics.

Why Polaris and who are they?

Polaris (PLS), which since 2014 has been owned by the parent company Innovative Interface, Inc. (III), is an ILS company based out of Syracuse, New York. PLS was chosen over its competitors to be the MAIN ILS in 2011 due in part to their high customer service satisfaction ratings. The PLS systems are designed to look and feel like Microsoft (MS) Windows and Office products. For example, many of the keyboard shortcuts in MS Word (Ctrl+S to save, and Ctrl+N for new) are identical within PLS software. Many view this as a positive, as the learning curve for PLS should be less steep for those who are familiar with MS Windows and Office.
Overall PLS System Structure

Each library in MAIN has their own ISP, firewall and network. This configuration means that each PLS user must first connect to a server in Syracuse before attempting to login to the PLS software itself. We connect to this server via the Windows Remote Desktop Connection tool. This is the reason why there are two separate pairs of usernames/passwords in order to authenticate a connection to the PLS ILS client software, and why there is a limited number of “seats.” The first pair connects to the server and the second pair logs into the PLS software itself.

ScrewDrivers

Perhaps the largest challenge with using Remote Desktop is printer drivers, for both receipt printers and copy machines alike. PLS has installed Tricerat’s ScrewDrivers software onto our servers to combat this common problem. All computers in MAIN that connect to Polaris also need to have ScrewDrivers installed on their computer. Like with any other Polaris problem that you might experience, please submit a ticket to the MAIN office if you are encounter printing issues within PLS.

Windows Compatibility

For a host of different reasons, computers running Windows XP should not connect to Polaris under any circumstances. Windows 7 and Windows 10 are the most popular operating systems for accessing the PLS software.

Source: http://blog.pcprofessionals.net/wpcontent/uploads/2014/04/windows_xp_dead.jpg
Future of This Document

This manual will be perpetually updated and changed. A revision history will be available as the final appendix of this document after the index which will track changes of significance. If you find any errors in this manual (factual, grammatical or otherwise), either while at a training session or while at your library, please submit a ticket. Likewise, if you have any feedback or suggestions about how to improve this document, feel free to open a ticket or reach out to a member of the MAIN central office staff.
Logging On

Double click the Polaris icon (pictured above) on the desktop to begin opening Polaris. This will open the remote connection to the Polaris server, as pictured below.

This screen can be minimized by moving the mouse to the top center of the screen which will reveal a blue ribbon, as pictured below. Using the commands at the right side of the blue ribbon, the remote desktop can be minimized, resized or closed.

Tip
Click the thumbtack icon on the left side of the ribbon to pin the ribbon to the top of your screen if you want it to always appear.
Click on the Polaris ILS 5.0 Production icon (pictured to the right) to launch Polaris. A Polaris Log On box will prompt the user for a user name and password. The user name field is not case-sensitive, but the password field is.

Enter the appropriate credentials and click OK.

**Logging Off**

To log off, close all of the open windows and select the Log Off icon (pictured above) on the remote desktop. **Do not close the session through the blue ribbon at the top of the screen.**

**Obtaining Your Terminal Server ID**

When getting technical help, sometimes you will be asked to provide your terminal server ID. This can be recovered by right-clicking on the Polaris icon on your desktop and selecting edit. It will bring up the screen to the bottom-right. Your terminal server ID will be the circled text in the image at the bottom right-hand corner of this page.
Adjusting Screen Size

It is not possible to adjust the size of Polaris through the remote desktop connection, however, it is possible to adjust some settings on the user's computer that will impact the view in Polaris.

**Instructions for Windows 7 Users**

Open the *Start menu* and click on *Control Panel*.

Choose the *Appearance and Personalization* option.

Click on *Adjust Screen Resolution*.

Depending on the shape and size of the user’s monitor, results may vary. The settings should look a little like the image to the right.

While the resolution can be set to a number of different settings, the recommended ones will be in black beside the bar, as underlined in the picture. If the user chooses an alternate resolution, it is possible that the screen will appear blurry or squished.

**Do not set the resolution below 1024x768. 800x600 is an option that is not recommended.**

**Instructions for Windows 10 Users**

Open the *Start menu* and click on *Settings*.

Click on the *System* icon.

Click on *Display* on the right side of the screen.

Select Advanced *Display Settings* at the bottom.

The user may need to test different resolutions via trial and error in order to find one that suits their needs.

**Do not set the resolution below 1024x768. 800x600 is an option that is not recommended.**

One can also open a support ticket to receive additional help with resizing the screen.
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Navigation

The shortcut bar will be the first thing seen when logging into Polaris. It is one of the main tools used to navigate the ILS.

There are three ways to access the information on the shortcut bar:

- clicking the linked text on the menu bar at the top (File, Acquisitions, Serials, etc.)
- clicking the colored orbs, which open a submenu of colored icons
- using keyboard shortcuts

To learn what each orb or icon stands for, hover the mouse over the icon and a tooltip will appear displaying its purpose (pictured to the right).

Only one orb can be opened at a time per row, but they can be dragged to different rows in order to show several submenus at once. Upon closing and re-opening Polaris, the menu returns to its default state.

The New icon is used when creating a new object, such as a new patron or item record.
Some of the items on the shortcut bar are not used by MAIN.

This includes the Acquisitions menu (magenta orb) and the Serials menu (green orb).

The System Administration menu (teal orb) is used only by those with administrative privileges.
Patron Records

Patron Records are where Polaris stores information about the patron, such as contact information and account preferences. This is not to be confused with Patron Status, which focuses on a patron’s actions and activity. To register a patron with a new account, a new patron record must be created.

One way to bring up an existing patron record is to conduct a search.

Find Tool

The Patron Records Find Tool can be found by accessing the Patron Services menu and choosing Patron Records (pictured below). This brings up the Find Tool.
The **Find Tool** is an incredibly powerful tool that makes it easy to narrow searches by many different parameters.

The two most powerful filters are the **Search by** and the **Limit by** filters. It is recommended to use **Search by** first, and if that returns too many results, it can be limited further with **Limit by**.

Filtering can be helpful if one is searching for a patron with an incredibly common last name that returns too many results; one can limit the search further by narrowing it to the **Patron’s Registered Library**.

**User Default**

If the same limiters are used often, the user can navigate to the menu and select **Option** and then **Save as User Default** (as pictured below). This will save the settings chosen, even after logoff. System default can be reverted to at any time via the same menu. This applies to all of the **Find Tools** within Polaris. Changing user default settings affects everyone who uses the PLS username that is currently logged in.
Settings

In the Settings tab, it is possible to set a retrieval limit for a search. By default, every search returns a maximum of 1,000 results. If one desires to return more than 1,000 results, this field may be changed as necessary. A Record Set may also be created from search results, if desired. Record Sets allow the user to create a list of and/or edit search results in bulk, and are explained in detail under the Technical Services section of this manual.

Karate Chop!

When sifting through the many results, Polaris only displays a small amount of results at a time. In order to show all of the results at once, the Karate Chop shortcut can be used. The Karate Chop can be performed by pressing the keys Ctrl+Shift+A at once. It will be clear if the Karate Chop was successful or even necessary if the results in the bottom-right corner say 900 out of 900 rather than 25 out of 900. Please note that the maximum amount of results shown will depend on what the retrieval limit is set to. The retrieval limit can be changed on the Settings tab.

Once search results appear, double-click on the patron’s name to open their records. This opens the Patron Registration workform.
Patron Registration

*Patron Registration* consists of three views: *Addresses, General* and *Status*. Each view can be accessed through the icons on the ribbon (as shown and labeled in the image below) or from the menu under *View*. Because each library has their own way of doing things, please see your circulation supervisor about what kind of information is required to register a new patron in your library.

### Introduction to Workforms

The screen above is called a *workform*. Polaris has many workforms, and they all follow a specific format. To the left of every workform is a colored ribbon which corresponds to the category’s color. Within the ribbon are small icons that navigate to different pages, or *views* of the workform. Fields that are bolded in workforms are required to be filled out in order to save the form.
Addresses

The workform on the previous page guides the user to fill out the patron’s contact information. Some additional prompts/options are explained below and correspond with the numbers on the image.

1. **Patron Code** – This field is changed in special circumstances, such as when the patron has a courtesy card, is an open borrower, or has a pay card. There are many different circumstances in which the patron code should be changed. Please see your circulation supervisor for more information.

2. **Patron Expiration** – The default expiration date for a patron record is three years after the date of registration. Upon expiration, there is an option of renewing a patron’s card for another three years.

   One may manually enter the date to change it, click the calendar icon to select a date (pictured to the right), or one may use the arrows next to ‘term’ to bump the date forward by year.

   The expiration/address check term can be changed. Different circumstances may call for a shorter expiration term. Expiration and address checks are essentially the same type of field, hence why they are numbered the same.

3. **Notification Option** – This lets the user choose how to notify the patron. Polaris chooses e-mail notifications by default. The two popular options are phone and e-mail. Some patrons like to be notified by text as well, which can be achieved by ticking the Additional TXT notice box. Choosing TXT Messaging from the dropdown will limit the notifications to only texts. Phone notifications only notify a patron that an interlibrary loan has arrived via a robo call. Staff may use the phone number for other inquiries such as notifying patrons of a missing part in an item that has been returned. E-mail notifications are used to automatically notify the patron about upcoming due dates, overdue books, and interlibrary loan arrivals.

4. **eReceipt Option** – When checked, this enables a patron to receive an e-mail whenever an item is checked out or a fine is paid. This option is only available if a patron has an e-mail account on file.
Adding, Changing and Removing Addresses

The buttons below the Addresses panel are what is used to add, edit and change an address.

Add – To add a new address, select the Add button. A new window will pop up (as pictured to the right). Input the address information. Select OK when done.

Edit – To change an existing address, select the desired address in the address panel by clicking on it and then click Edit. A new window will pop up (as pictured to the right). When finished changing the information, select OK.

Remove – To remove an existing address, select the desired address in the address panel by clicking on it, and then click Remove. An alert will pop up asking if you are sure you want to remove this address. Select Yes if you are sure.
General

The General workform collects additional information on the patron. Many of the fields are self-explanatory; others are explained below.

1. **Statistical class** – This reflects the town that the patron lives in.

2. **Password** – Setting a password enables the patron to access their account online. This field is required to be completed in order to save the workform. The default password should be the patron’s last four digits of their phone number.

3. **Former barcode** – If a patron loses his or her card and a new one is assigned to them, here one may input their old number. The Patron Records Find Tool allows one to search by former barcode.

4. **Last activity date** – This field shows when the patron has last used their card.
5. **Exclude from notices and reminders** - Checking these boxes will exclude the patron from receiving any of the posted notices and reminders. These boxes are all unchecked by default when creating a new patron record.

6. **Maintain reading history** – Checking this box will enable Polaris to keep a log of past items the patron has checked out. By default, this box is left unchecked. It is considered a breach of privacy to check this box without consent. It is strongly recommended to ask the patron to turn on Reading History themselves via the PAC so that they can read the terms and conditions, as seen below:

Only enable this option if given permission from the patron.

7. **User Defined Fields**

8. **Authorized to Pickup My Holds** – Input a name of a spouse/friend/family of patron who is authorized to pick up their holds.

9. **Library Relationship** – This is related to the above field. Write the relationship of the authorized person to pick up holds for the patron (e.g., spouse, daughter, niece, father, etc).

10. **Local Library Use** – This is a non-blocking note that one can put on the patron's account. When their account is accessed through the check-out screen, the note will be visible in the top right corner, as pictured below.
Patron Registration - Status shows any blocks the patron has on their account, as well as a brief summary of their account including money owed, items out, and a history of notices the patron has received either by phone or by e-mail. There is a much more comprehensive view of Patron Status that will be addressed later in this guide.

Polaris Blocks
This workform gives us a small glimpse of blocks. Blocks in Polaris are pop-up boxes that appear when a patron’s account is opened or an item is checked in or out. Blocks can appear because patrons have items ready to be picked up, overdue fines owed of any size, notes applied by librarians, expiration notices, and more. A card is not rendered unusable or blocked because of a block. It functions as an alert.
Circulation functions include checking items in and out to patrons, managing a patron’s account, and placing holds on items. The user can access circulation functions by clicking on Circulation on the shortcut bar menu (as pictured to the right).

The dark red orb also holds the circulation functions. The options that this section covers are Check Out, Check In, Patron Status, Request Manager, Holds Queue, Hold Requests, and ILL Requests.

Check In

The Check In workform can be opened by clicking on the dark red orb and selecting the blue Check In icon.

The image on the next page displays the Check In workform. The three main views, Normal Mode, Bulk Mode, and In-House Mode are labeled on the left side and defined below the image. There are four views in total, only three of which are used consortium-wide. Other various features are numbered and defined on the following page.

To check an item in, scan the item’s barcode with the wand scanner. An item has been successfully checked in when one sees the status has been changed to In, In Transit or Held under the status field as shown on the image on the next page.
Normal Mode

In this mode, fines pop up when they are accrued on checked in materials and must be resolved (paid, waived or charged) before closing the window.

Bulk Mode

This mode allows for quick check-in of many materials. Fines are automatically charged to the patron account. This differs from Normal Mode because the system does not offer to resolve fines in this workform.

In-House Mode

This mode helps to track statistics for materials that do not circulate but are used by patrons in the library. It is important to note that the Year-to-date and Lifetime statistics for in-house usage are updated, however circulation statistics remain the same.
User Default

One can set any mode as default depending on one’s preferences and needs. Changing the default setting will change which mode opens when one opens the Check In workform. The default setting can be changed by opening the Check In workform and choosing the view desired to be set as default. Select View from the top menu, then select Save Current View as User Default. See the image below as an example.

Changing user default settings affects everyone who uses the PLS username with which the user is currently logged in as.

1. **Free Days** – Free Days allows Polaris to adjust its fine schedule when checking in items. For example, if a patron deposits their due books into the book drop an hour after the library closes, and the item is checked in the following morning. By setting the Check In workform with 1 Free Day, Polaris responds as if the patron had returned it yesterday, instead of charging an overdue fine. This feature comes in handy for holidays, weather-related closings, regular weekend closings, and more. Free days can either be added one at a time with the provided arrows, or by choosing Select Date and selecting a date on the calendar to use as the official check-in date.

2. **Pending Patron Account Transactions** – When used in Normal mode, any fines on checked-in materials will appear here until resolved. A fine can be resolved by selecting one of the four boxes to the right: Pay New, Waive New, Charge New, or Manage All Fines.
Blocks and Alerts

Sometimes checking an item in will prompt a block or an alert. The main blocks and alerts encountered in the Check In workform are listed below.

**Item Blocks**

An item block is created in the item record and serves as a note attached to the record. The different types of item blocks are explored in more detail in the *Technical Services* section of this manual. An item block most often appears when an item is listed as having many pieces, such as an audiobook or a CD that includes a booklet. This block is created in the item record to alert the circulation staff that the item has more than one piece, and therefore remind them to count the pieces before checking an item in or out in case any part of it is missing. Selecting *Yes* will proceed with the check-in. Selecting *No* will halt it, and the item will remain checked out to the patron. Selecting *Item Record* will open the item’s record.

**Fines**

If an item has an overdue fine in *Check In - Normal Mode*, an alert will pop up with the fine amount. The user can choose to continue, waive or charge the account. If the user chooses *Continue*, the fine will appear at the bottom of the workform and it will need to be resolved before closing the *Check In* workform.

**In-Transit**

If an item does not belong to the library that is checking it in, it will route the hold by alerting the user with a prompt. Clicking OK will create an *In-Transit* slip for the item. Pressing the *x* in the corner of this alert will cancel the transaction.
Transfer Hold

If an item that is on hold for a patron at another library is returned, Polaris will route the hold by alerting the circulation staff with a prompt, asking to transfer the item for a hold. The options are Yes, No, Cancel, and Help. Selecting Yes allows Polaris to print out an In-Transit for Hold slip.

This can (but should not, except for special circumstances) be overridden by selecting No. After selecting No, the user can choose to reactivate the hold for the patron, by selecting Yes, or to leave the hold deactivated by selecting No. Cancel will cancel the transaction altogether without making any changes.

Fill Hold

If an item is returned that fills a hold for a patron at that library, an alert will pop up with the text: satisfies a hold request for along with the patron’s name, barcode and phone number. Selecting Yes will print out a hold slip for the patron.

This can (but should not, except for special circumstances) be overridden by selecting No. After selecting No, the user can choose to reactivate the hold for the patron by selecting Yes, or leave the hold deactivated by selecting No. Cancel will cancel the transaction altogether without changing any settings.
Polaris 5.0 ILS

Check Out

The Check Out workform can be brought up by opening the dark red orb and selecting the red Check Out icon.

Below is how the Check Out workform appears.

Important features are numbered and defined below the image.

1. With the exception of the first icon, which opens Patron Registration, these icons are discussed in a later section, Patron Status.

2. Using these options, it is possible to reset an existing loan period, or set a special loan period for an item the user has not scanned yet. Overdue items cannot be reset. To set a special loan period, one must scan the item after setting the date.
3. This panel shows all of the items that have just been checked out to the patron. It reflects information about the book. The field in the Action column changes from Check Out to Renew when an item is checked out more than one time, even if scanned twice by accident.
Blocks and Alerts

Like the Check In workform, many blocks and alerts may pop up here as well. Usually, blocks and alerts pop up when the patron’s account is scanned or entered into the Check Out workform or when a material is checked out to the patron’s account.

Held Items

This block appears when the patron has an item held at a library branch. The block will specify which branch the item is at. Selecting Yes will continue with the transaction. Selecting No will cancel it. Choosing Patron Registration will open the patron’s registration form.

Held For…

This alert appears when the item is being held for a patron other than the one it is currently being checked out to. Sometimes this occurs when hold slips have been swapped and the items are mislabeled. The block provides the name and barcode of the patron it is being held for.

Long Overdue

Long Overdues appear when an item has been overdue for longer than four weeks past the due date. The block appears in order to help staff members remind patrons about these long overdue items.

Fine

Patrons with any overdue fines, from a few cents to hundreds of dollars, have a block on their account. However, if their account does go over the $5.00 threshold, a second block message appears below the first, saying that patrons have exceeded maximum fees permitted.
Expired

Patrons with expired accounts will not be able to renew books online. They will also get a reminder when it is time to renew their card. **This block does not disappear when it is resolved. It must be manually deleted from the Patron Status - General view.**

Notes

Any time a blocking note is put on a patron account, it shows up as a block (instructions on how to put a blocking note on an account can be found in the Patron Status – Notes section). The note is not actually shown in the block, so the note must be manually viewed in the block by visiting the Patron Status - Notes workform.
Patron Status

The Patron Status workform shows the standing of a patron’s account. This includes any items they have out and fines or holds on their account. This screen is usually accessed through the Check Out screen (making it easily accessible during circulation), but can be accessed in other ways as well.

The keyboard shortcut F6 will open a Find Tool nearly identical to the one explored earlier. The only difference is that when a patron’s name is clicked, it will open the Patron Status screen instead of the Patron Record screen.

One can also select the dark red orb, which will open the Circulation subset of icons.

Finally, all of the pages discussed here are accessible through the Check Out workform submenu (pictured to the right).

The Patron Status workform consists of eight views: General, Items Out, Account, Claims, Requests, Reader Services, Associations and Notes.
The General view has two main points of interest: Block and Notice.

Block

The left side of the workform shows the blocks currently on the patron account. As mentioned earlier, blocks are simply alerts – they could be anything from an overdue fine to a notice that an item has come in for a patron.

Blocks usually disappear when the situation is resolved: for example, if the fine is paid, the fine block will no longer be there. If a note is removed, the block will disappear. This is not true for all cases, however.

One particular situation when a block needs to be manually deleted is when a patron’s registration expires. Even after the expiration date and the address check are updated, blocks need to be manually deleted from this workform to come off of the patron’s record.

To manually delete this kind of block, select the block by clicking on it, and then click on the Delete button at the bottom of the screen.
Notice

Notice (shown on the previous page, beside Block) shows all of the e-mail and/or phone notifications a patron has received. It includes the title and type of the item, the time and date that the notification was sent, the method it was sent, and the amount of money if it was a fine notification.

This is useful information for troubleshooting the automatic patron notification service. If a patron claims they were not notified, the PLS user can verify that information here. If it says they were, there might be an issue with the phone number/e-mail on their account, or maybe their phone was busy or disconnected. If it shows no notification and there should be, please open a support ticket.

It can also be helpful for patrons who dispute late fees because they claim they have not received any sort of late notification.

Notice only remembers the previous 50 notifications on a patron’s account.
Items Out

The Items Out workform shows the items that the patron currently has on their account. It also offers a variety of renewal options and quick access to the Accounts workform.

Items Out shows the following information about items the patron has checked out: Item Barcode, Title, Author, Due Date, Call Number, Material Type, Renewals, and Assigned Branch. Each section can be expanded or condensed as needed to read the entire line. This can be done by clicking the small line separating the columns and dragging this line left or right as needed to expand the column. The small lines are circled in the image below.
The most common function of the Items Out workform is to renew items, although it can do much more than that. Overdue items are clearly marked by a yellow warning icon. Items with no renewals remaining can be renewed at the discretion of the assigned branch.

Some additional prompts/options are explained below and correspond with the numbers pictured on the previous page.

1. **Print** – Clicking this button allows the user to print a list of the items currently out. If there is a receipt printer connected to this terminal, it will print out there. In order for this feature to work correctly, a receipt printer must be configured within the Patron Status workform. See appendix A for details on printer installation. This is useful if a patron asks for a printed list of all items they currently have out.

2. **Renew** – This renews the selected items. If any items are unable to be renewed, an alert will pop up. Items with no renewals remaining can be renewed at the discretion of the owning library only.

3. **Renew All** – This renews all items. Items with no renewals remaining can be renewed at the discretion of the owning library only.

4. **Special Renew** – This allows the user to give the selected item(s) a special due date that does not correspond with the loan period of the item. Use this function at the discretion of the owning library or your circulation supervisor.

5. **Reset Due Date** – This allows the user to reset an item’s current due date to another date.

6. **Estimated Fines** – If a patron has overdue books, they are not charged for fines until the book is either returned or renewed. It is possible to estimate the number of fines on currently overdue items by clicking on this icon.

7. **Make Claim** – A claim can be made if a patron claims they have returned a book, but it still appears on their account, or if a patron claims the item was mistakenly charged to their account and they had never taken it out. This option is used at the discretion of the circulation supervisor. More information on this feature is available in the section **Patron Status – Claims**.

8. **Declare Lost** – If a book is lost, it can be declared so with this option. This automatically charges the patron with the cost of the book that is specified in the item record. Note that a “lost” item is not the same as a “missing” item.

9. **Notification History** – This panel serves the same purpose as the Notice panel in the Patron Records – General screen.
Account

This workform shows the patron’s financial record. If they have any overdue or lost/damaged fines, this is where they appear.

1. **Charge** – A patron can be charged any amount here. This can be useful for manually charging for a lost or damaged item, or if the user is charging for something other than a library item, such as a replacement library card or print job. If the patron cannot pay at that time, the fee will remain on their account until paid.

2. **Pay** – By selecting one (or several, by holding the **CTRL** key on the keyboard and clicking on the charges you wish to pay), one can pay the amount and remove the fine from the patron’s account.

3. **Pay All** – This automatically pays all fines.
4. *Waive* – This waives the fine from the patron account. It shows up in the transaction summary as being waived. Waiving and forgiving fines are the same.

5. *Waive All* – This waives all fees. Waiving and forgiving fines are the same.

6. *Transaction Summary* – This is an itemized history of all transactions associated with this patron account, including all payments received or overdue fines waived. This includes date, time, type, reason for charge, title and barcode of item, and amount paid/waived on the account.

7. *Notification History* – If one selects a fine, clicking this icon will display when and what type of notifications were sent to the patron about the item.

Some of the icons appearing on the *Patron Status* view, pictured below, aren’t used, and thus were not covered in this guide.
Claims

Claims can be applied to a patron account if a patron claims they have never taken out an item that is currently charged to their account, or if they claim they have already returned an item that is currently charged to their account.

Claims are meant to be used sparingly, and are not used at all libraries. Please speak to your circulation supervisor to confirm the status of Claims at your library.

If your library allows for the Claims process, it is recommended to strongly encourage the patron to be absolutely one-hundred percent sure that they have returned or have never taken out the item they are going to claim they returned/never had. **Once a claim has been made, it is permanent and cannot be removed from the patron’s account.**

To mark an item as Claimed Returned or Claimed Never Had, the user must navigate to the Patron Status – Items Out workform. Select the material that is currently checked out that the patron claims has been returned and then click on the Claims icon. The following pop-up will appear. One of two claim statuses must be chosen: Claim Returned or Claim Never Had.

For the purposes of this guide, we will select Claim Returned.

- Select OK.
- Now when the Claims page is accessed from Patron Status, the Claim will appear.
- For 45 days after an item is marked as Claimed Returned or Claimed Never Had, it remains on this screen and it can be changed. This means if the patron finds the item, it can be returned and checked in.
- It can also be marked as lost and then paid for by the patron and subsequently removed from the patron’s account as long as it stays within the 45-day-window.
- If the item is checked in during this window of time, it is automatically removed from the patron’s account and any overdue fines are charged as usual.
- Once this window of time closes, the claim becomes unavailable and remains permanent and unavailable on the patron’s account.
The above workform shows an example of a patron with one claim. The available options and parts of the workform are numbered and explained in detail below.

1. **Reset Total Claims** – This option is unavailable.
2. **Notification History** – This shows the notification history of the claim and the patron.
3. **Declare Lost** – Click this icon to declare this item as lost and charge the patron a replacement fee.
4. **Check In/Charge for Missing Parts** – This option is unavailable.
5. **Total Claims** – This shows the total number of claims a patron has.
6. **Current Claims** – As described above, a claim stays current for 45 days. As soon as a claim is no longer considered ‘current’, it can no longer be changed or removed.
7. **Current Lost** – This shows the total number of lost items a patron has. This number is taken off of the patron’s account when the lost item fine is paid.

**Requests**
The *Requests* or *Holds* screen shows which items a patron has put in a request for through the reciprocal borrowing agreement in place throughout MAIN. This screen provides information on where a patron stands in a queue for an item, and whether the item in question has been shipped from the lending library. It also allows librarians to pause a patron’s position in the queue.

1. **Activation Date** - shows the date that the hold was placed, or activated. This value can be changed by double-clicking on the hold to open up the *Hold Request* workform where *Activation Date* can be modified.

2. **Status** - There are six possible hold statuses:
   a. **On Waiting List** – This means the hold has been placed but there are patrons waiting in line for the book.
   b. **En Route** – The book has been wrapped and shipped, and is on its way.

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**Tip**

If a patron is going away on vacation and does not want to lose their place in the queue, they can ask you to place a hold on their hold! Double-click the hold you want to pause, and then change the Activation Date to the date the patron will be returning from their vacation. Save the workform and you’re done!
c. *In Process* – This usually means the *Pick List* has been printed out, and the book is being prepared for shipment. Sometimes this means it is in the process of being linked to a record.

d. *Ready for Pickup* – The item is ready at its destination. The patron has a week from when it becomes ready before it is marked ‘Unclaimed’. Your library might wait longer to physically send unclaimed items back to the owning library.

e. *Unclaimed* – The book has not been picked up, and will be pulled from the hold shelves and sent back soon.

f. *Cancelled* – The hold has been removed from the account and sent back.

3. *Pickup Branch* – the branch the patron has selected to send the book to. By default, this is set to the patron’s home branch.

4. *Queue* – where the patron stands in line for the book. This is merely an approximation for where the patron stands and should always be given to the patron with the disclaimer that this number is only a vague indication of the wait period for their item.

5. *Hold Until Date* – If an item is *Ready for Pickup*, this date will show until the item is picked up, unclaimed or cancelled.

6. *Group/Ungroup* – Grouping a hold allows the user to select several holds and link them together to fill one hold. For example, one can choose a DVD and a Blu-ray version of a film and place holds on both of them in order to get a film to a patron faster – if they do not have a preference, of course. Whichever copy comes in faster will arrive and the other hold will come off of the item. This concept is explored more deeply in *Grouping Hold Requests* later in this manual.

7. *I.L.L. Requests* – This area is for JerseyCat requests and must be inputted manually.
This page shows a history of items the patron has checked out. By default, this list is disabled. It can be enabled on the *Patron Registration – Addresses* work form, however it is strongly recommended that the patrons enable this feature on their own due to privacy concerns. If a library staff member makes the change in the Polaris client, no warning appears. If the patron enables it themselves within the PAC, the following warning appears:

By clicking OK, the patron gives their consent.
Associations

In order to use *Associations* with your library, you must request permission on a Polaris account by opening a ticket.

*Associations* are a list of people a patron is associated with. This is most often a patron’s spouse, children or other close family or friends.

The Associations workform is pictured below.

In the image above, one can see that *Associations* are being used because the *Associations* icon in the left ribbon has a yellow background.

By default, this background would be gray.
Associations are added by clicking the plus icon on the Associations view (shown on the previous page).

Clicking on the plus icon will bring up the window to the right of this paragraph. This screen allows the user to input a patron barcode and pull up the desired account. It also displays two options at the bottom: Block and Allow.

Generally, Block me is discouraged. The patron will be blocked if any of the patrons associated with him or her are blocked. This would include blocks for reasons such as holds or notes.

Allow me, however, is encouraged, but only if permission is given by all parties involved. It functions similar to how Authorized to Pickup My Holds, works (explored in Patron Registration), only this goes one step further. This allows the patron to pick up holds for any of his or her associations so that the patron does not need to carry the other person’s library card or personal ID when they come to pick up that person’s item. The library staff member does not then need to look up that person’s account when the associated patron comes to pick up items on behalf of others.
Notes

Notes can only be seen by library staff members. There are two kinds of notes that can be placed on a patron’s account: non-blocking and blocking.

Non-blocking notes do not alert the PLS user; they are non-invasive. The only way to view these notes are to manually go into the Notes panel.

Blocking notes create an alert that pops up when the patron’s library card is scanned in the Check Out screen. The block that pops up says ‘Patron has notes’. Then, the staff member can choose to manually look at the notes.

One good use for the Notes panel is to alert a staff member that a patron’s library card has been found. Sometimes phone numbers on patron records do not work, and it is difficult to get in touch with a patron who lost a library card or other item that could be traced to them. Creating a note about this may prompt a librarian who is checking a book out to the patron to mention this. Please speak with your circulation supervisor about when to use Notes.
Holds

Bibliographic and Item Records

A brief introduction of item and bibliographic records is necessary to understand the full scope of placing holds in Polaris.

Bibliographic Records

A bibliographic record is a record for a library material such as a book or piece of media. Generally, there is one bibliographic record for each unique piece of media. Sometimes, several bibliographic records can exist for the same title if it is a unique edition of the title. An example of this would be abridged and unabridged audio books, or a certain edition of a children’s book that includes a readalong CD. Individual libraries do not have the permissions to create bibliographic records. This task is left to select cataloging staff.

Item Records

An item record is a record created for a specific physical item and then linked to an existing bibliographic record. A new item record is created for every copy of every item. For example, if a library owns three copies of a popular book, they would have one item record for each physical item. Item records make it possible for patrons to place holds on one particular item.

Placing Holds on Bibliographic vs Item Records

Placing a hold on a bibliographic record places the patron in a pool of all copies owned by every single library in MAIN. The patron then receives a copy depending on which library the system randomly chose, or which item became available first. There are benefits of placing a bibliographic hold. If there are 35 copies of a book across the entire consortium, that means the patron has a greater chance of receiving their copy quickly. There is also an incentive for fulfilling holds locally. If a hold is placed on a bibliographic record but all items are checked out, patrons get priority for items at their home library. If a patron were 200th on the overall queue but 1st in line from their library, they will receive their own library’s copy before any of the other 199 people.

Placing a hold on an item record is specifically requesting an exact copy of an item. If the selected item is unavailable for any reason, such as being currently checked out, damaged, or lost, the hold request will go unfilled until the item is
available. If one places an item hold, a small item record icon will appear beside the hold (as pictured to the right). The previous page shows an example of a hold placed on an item record.

Locating Item Records

A recommended way to ensure that searches for materials done with the Bibliographic Records and the Item Records Find Tools are efficient is to change the default settings.

The Search by: dropdown is recommended to be set to ‘All keyword fields’ which mimics the PAC default search. By default, this tool is set to search by Title. While searching by all keywords greatly increases the number of search results, it allows users to fully utilize the many other filters and limits available with the Find Tool.

Checking Item Availability

Checking item availability is important because it can help the user determine whether the item is currently available in your library, which other libraries it is available in, if the item has a long queue, which formats it is available in, how many copies are available, and more.

Verifying this information first will make the user’s job easier and will also help serve the patron better by giving them as much information as they need.

Items can be located through the Bibliographic Records Find Tool. One can toggle to item records through the Object dropdown, but bibliographic records are not available on the Item Record Find Tool.

It is generally recommended to always use the Bibliographic Records Find Tool in order to locate information about library materials.
The screenshot above displays bibliographic records that match our query. The title ‘NYPD Red 4’ appears five times, in five different formats. From top to bottom, it shows the book, the unabridged audiobook, the eBook, the large print edition, and the digital audiobook.

To obtain a view of which libraries own the audiobook, right-click the audiobook and select Preview. This opens the preview panel, as seen on the following page.
This shows a list of all copies throughout the consortium that are linked to the bibliographic record we found.

Above the item records listed, each column is labeled, beginning with ‘Title’. The user can click any of these labels to sort the items in the column alphabetically or click again to sort the items reverse-alphabetically. This can help the user find a library in particular, or group all of the ones with the status ‘In’ together.
Placing a Hold

There are many ways to place holds for a patron. The Place Hold workform is available from the Check In, Check Out, Patron Registration and Patron Status workforms. Alternatively, one can use the Bibliographic Record Find Tool or the Item Record Find Tool to access the record first, and then place a hold from there, as covered in Checking Item Availability. It comes down to personal preference and convenience.

Hold Request

From the Check In, Check Out, Patron Registration or Patron Status workform, one can select the Place Hold icon (as pictured to the right) from the top of the workform. This opens the Hold Request workform.

Alternatively, one can click on the New icon, or use the keyboard shortcut CTRL+N and select Hold Request (as pictured to the right). This will bring up the workform pictured below.
General – Pictured on the previous page is the workform seen when placing holds.

1. **Activation/Expiration** – This shows the activation and expiration of the request. By default, holds are activated the moment the request is saved, and they expire exactly one year later. Existing holds can be activated/deactivated from the *Patron Status – Requests* workform. This comes into use when a patron is going away on vacation and they don’t want their hold to arrive when they are away. When a hold is deactivated, they do not lose their place in the queue.

2. **Pickup** – This shows the location that the holds will be shipped to. By default, this is set to the patron’s home library. It can be changed as long as the item has not yet been shipped. As soon as the item is marked *En Route*, the location can not be changed. It can, however, be rerouted once it arrives at the original destination.

3. **Barcode Find** – Clicking on *Find* will bring up the *Patron Records Find Tool* and allow the user to specify a patron. If the *Hold Request* workform was opened from a *Patron Status* or *Check Out* workform prepopulated with a patron record, this field will be automatically filled in.

4. **Record Find** – Clicking on *Find* will bring up the *Bibliographic Records Find Tool*. One may toggle between bibliographic and item records with the *Object* dropdown. By default, the search sorts by Title, but this can be changed and limited similar to the *Patron Records Find Tool*. 
Notes – The notes workform allows the user to attach notes to a specific hold fulfillment. This might come in handy when communication is needed between libraries. The note should be dated and initialed, including the library name (e.g., FLO.07/01/16.DN).

Once the request is satisfied, it will show up under Request satisfied by with the unique bibliographic control number for that item record.
**Multi-Request** – This feature comes in handy when one needs to place a hold a book or group of books for a group of people (such as a book group) or when one needs to place a long list of holds for one patron.

To add a patron or title, click the plus icon in the appropriate field. To remove a patron or title, click the minus icon in the appropriate field. The user can bulk remove patrons or titles by holding down the **CTRL** key on the keyboard and selecting several items one at a time and then selecting the minus icon.
Grouping Hold Requests

Grouping hold requests is an incredibly useful feature designed for getting patrons the item they want as fast as possible. Sometimes, a patron will not have a preference between a Blu-ray or a regular DVD. In that case, it is possible to request all editions of a film and link all of the bibliographic records together. When at least one of them arrives, the other holds will come off of the account.

It is also useful for paperback versus hardcover books, or a popular older book with multiple editions if there are several bibliographic records with varying holds and the patron does not have a preference.

This feature is possible in Patron Status – Holds/Requests view.

Grouping is accomplished by first selecting the holds by holding down the CTRL key on the keyboard and clicking on the holds desired to be grouped together. Then, click on the first green link icon, on the left. Hovering over it with a mouse cursor, will display the tooltip ‘Add to Group’. The link icon to the right is for removing a request from the group.

In the example above, all three requests are part of group “A” as seen in the far right column. When one then creates a new group, it would become group “B”, and so on.

Removing a Hold

If a patron no longer desires a hold, it can be removed from their account. This can only be done if the status is not currently En Route. Holds can be cancelled. To cancel a hold, right-click the item in the patron’s hold queue and select cancel. This will change the item’s status to Cancelled. To remove the item from the queue after it is cancelled, right-click it again and select Delete. If a cancelled hold is not removed from the queue, it will remain on the patron’s queue with the Cancelled status indefinitely.
Re-routing Hold Requests

It is possible to re-route a hold’s pickup location. This can be done by double-clicking a hold in the patron’s hold queue and changing the library name under *Pickup* (pictured below).

The workform must be saved in order for this to take effect. Once the item reaches its next destination and is checked in, Polaris will print a receipt to the new destination.

Sending Back Unclaimed Holds

Upon arriving to its destination, a hold is only marked *Ready for Pickup* for 7 days until it becomes *Unclaimed*. In order to send the item to the next person in the queue, or back to the lending library, check the item in as if the item were being returned. Then click *Yes* at the next prompt (pictured to the right).

Finding a Patron’s Position in the Hold Queue

A patron’s number in the queue can be found in the *Patron Status – Holds* screen, in line with their hold. The patron cannot access this information through the PAC. It is recommended that you not commit to estimating how long it will take for the item to arrive. It is impossible to predict if a patron will return an item early, on time, or late. If you quote a patron 10 days and it turns into 30 days, that is a poor customer service experience and reduces the library’s credibility.
Using the ILL Function

Initial Setup

The ILL function in Polaris makes it easy to link and keep track of JerseyCat and WorldCat items in a similar fashion to regular holds.

If it is your first time ever creating an ILL template for your library, an ILL template must be created. For the specifics of creating an item template, please see the Technical Services section of this manual.

The purpose of the ILL template is to determine the loan period, fine code, renewal limit and material type that will be selected by default when creating an ILL item record. It is important to name your template ILL Item.

Hold Request Creation

Navigate to the Holds view of the Patron Status workform. This is where the patron’s current requests can be viewed.

Since the requested item is not in the Polaris database, a custom hold request must be created. In order to do this, select the Place Hold icon, pictured to the right. This opens the New Request workform.

Select Tools from the navigation bar at the top of the workform and click on Unlock Request. This allows the user to input custom data about an item, rather than pulling this item from an existing record. The message to the right will appear; click Yes.

The user may now manually input the title, author, and any other pertinent information you wish to include in the ILL bibliographic record. When this step is completed, select the ‘save’ icon at the top of the workform to save the request.

After the workform is saved, click the Convert to ILL icon at the top. It is pictured to the right of this text. Upon clicking this icon, the workform will close.

It is also possible to convert an unfilled MAIN request to ILL by right-clicking the request and choosing Convert to ILL Request. This should only be used if the hold can absolutely not be filled by MAIN.

The hold will now show up in the ILL Requests section of the Holds view, inside of a box beneath the Polaris requests section, as pictured on the following page.
Right-click this request and choose Export. This sets the status from *Inactive* to *Active*.

**Receiving an ILL Request**

Once the item is received via ILL and physically in the requesting patron’s library, right-click the hold request and select Receive.

A new window will appear (as pictured to the right of this text) entitled *Brief Item Entry*. Here it is necessary to scan the barcode of the book and enter the call number. The information under ‘Circulation Setup’ will automatically populate depending on the information set within the *ILL* template mentioned at the beginning of this section.

A new pop-up will open, as pictured to the right. As mentioned, the item status changes to *Held*. This means that the patron will receive a notification of whichever type their account is set up for, the same as a regular hold request.
When this item is checked out to a patron, a block will appear, as pictured to the right. This lets circulation staff know that the item created was done so using the Polaris ILL module. The same block appears upon check-in.

When the item has been checked in, it is necessary to right-click the original request and select Return, as pictured below.

Then, right-click the item again and select Delete. Polaris will automatically delete the item and its associated bibliographic record.

To remove an unfilled request, the Return option will not be available. Instead, select Cancel and then right-click and Delete the request.
Reports

There are many different types of reports in Polaris. Some reports can be run from within the ILS itself, while others must be run from SimplyReports. Reports display and summarize data such as patron information, holds information, item and bibliographic record information, and more.

This guide will only briefly introduce reports by showing an example of a report found within the Polaris client. In the future, there will be an independent training course in reports through both of these methods.

In Polaris, reports can be accessed through the Utilities dropdown by clicking on Reports and Notices (pictured to the right). It can also be accessed by opening the orange orb and clicking on the first icon (pictured below).

How to Run and Print a Report

When Reports and Notices is first opened, the following window will appear.
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This window categorizes the different types of reports. The left panel shows the categories. Click on the icons to expand a category and the reports will repopulate in the right panel along with the date they were last modified by the ILS administrator.

For the Pick List, we will select Circulation, because it is a circulation report and is one of the most popular reports. Selecting Circulation opens two subcategories: Holds and ILL. Select Holds and its reports appear in the right panel.

To run the report, double-click on the name of the report, in this case Hold Requests To Fill. This brings up another window, which asks for the sorting options that are preferred. See the image below.
The image on the previous page asks how the user prefers the results to be listed. The options are call number, collection, format and title. This is purely based on preference. It was sorted by collection here because pick lists are usually like a scavenger hunt and sorting by collection organizes it in a way that makes things easier to find in a library.

When the sorting options are finalized, click submit.

Depending on the size of the report, it may take longer to run than others. Please be patient.

When the report appears, it should show up as a PDF file, which is easy to print. Patron information has been redacted in black below for privacy reasons, but would not ordinarily appear this way.
Introduction to SimplyReports

Simply Reports is used by visiting a separate website that will allow the user to create reports from scratch using the information stored within Polaris. It can only be accessed from a browser.

It can be accessed from the following link: http://main.polarislibrary.com/simplyreports

The username and password to login to SimplyReports is the same username and password used to login to a circulation supervisor account in Polaris. If that username and password combination does not work, please open a support ticket.

SimplyReports can be thought of as a combination of the Find Tool and the Reports and Notices utility in Polaris. Every report can be exported into an Excel spreadsheet.

After logging into SimplyReports, the screen will appear as the image does below. Across the top of the screen are thirteen tabs, the first ten of which represent categories of reports and the final three representing administrative functions, and finally, a help feature.
Immediately below the tabs include three report types: list reports, count reports and statistical reports.

**Patron account list reports** | **Patron account count reports** | **Patron account statistical reports**

List reports include a list of whatever one is searching: patrons, patron accounts, holds, etc. Count reports include a count of whatever one is searching. Statistical reports use the transaction database to display statistical information such as the number of check outs, check ins, and so on.

Each of the first ten tabs follow a standard feature as pictured on the previous page. The standard interface includes report output columns, columns selected for output, and columns selected for sort. Select a filter by clicking on it and then use the right-facing arrow to move it into the Columns selected for output field. The next right-facing arrow can be used again to move it into the Columns selected for sort field if desired. Double-clicking a field accomplishes the same result.

Below these sort features, there are filters to further narrow down the report output. Click the + to expand the row, and click the – when expanded to collapse the row.
When the appropriate filters have been applied, click on Submit to submit the report.

Once a report is submitted, it can be downloaded, saved, or the user can create a record set from report results.

- Downloading a report output always downloads to an Excel file with an .XLS extension.
- Saving report parameters for later use makes the report parameters available under the My Reports tab and allows users to run reports again without setting the same report parameters repeatedly.
- Creating a record set for later use asks the PLS user to name the record set and create a note. It makes the record set available to pull up later within the Polaris client. To pull up a record set, use the keyboard shortcut CTR+N in Polaris and choose Record Set. Select the type of record set created (e.g., Patron if a Patron record set was created) and then choose Open. Search for record sets by name. Record sets are covered in more detail in the Technical Services section of this manual.
Technical Services

The technical services department is generally responsible for processing new items which arrive at the library and removing items which have been weeded out of the collection. In order to add items into the library, item records must be created. Item records are associated with bibliographic records. Bibliographic records are created by professional catalogers at the MAIN office in MARC format. The process of associating item records with bibliographic records is called linking.

Technical services functions can be accessed by clicking on Cataloging on the shortcut bar (pictured above, to the right).

The dark blue orb also holds the technical services functions (pictured to the right). This section covers the entire linking process.

The Anatomy of an Item Record

Item records are important because they help library staff identify and find materials quickly. They also translate to the PAC, making it easy for patrons to find what they are looking for.

The Item Record workform consists of five views, explained below and marked on the screenshots on the following pages.

*Cataloging* – This is the main item record workform where a user inputs information that makes up item records.

*Circulation* – This view allows a user to see the circulation history of an item including due date, current borrower, loaning branch, and other useful information. Some of the most useful information on this workform includes the last check-in location, date, time, and workstation, as well as the last borrower, loaning branch, and last date of circulation. This is useful in tracking down lost items.

*Source and Acquisition* – This view allows the user to input a funding source or donor organization responsible for the item. It also provides important statistics, such as year-to-date circulation, lifetime circulation, and more.
Polaris 5.0 ILS

Notes and Notices – This view allows the user to input notes on the item. Some of the most useful notes include library-assigned blocks and free text. These come in handy when items include extra pieces such as a specific number of discs, or extras such as booklets or readalong CDs or when items are missing or damaged.

History – This view allows the user to see the circulation history of the item including the date, assigned branch, status, action, location, and user workstation.
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Cataloging

1. **Bib control number** – Every item is linked to a unique bibliographic control number. This number is completely unique to the bibliographic record. This number can be useful when working within a technical services department and passing information back and forth about a particular material, or a material that is difficult to find, such as a serial.

2. **Price** – This must be inputted manually. The price is usually found on the book. If no price is inputted, this field will automatically populate with any price stated in the MARC 020 tag subfield C of that record. If that field is blank as well, Polaris uses a default price that is set within the ILS. A list of the current default prices can be found in Appendix B at the end of this manual.

3. **Shelf location** – Some libraries utilize this field to create subcollections. Consult with your supervisor about how your library does or does not use this field.

4. **Material type** – This describes what the item physically is, whether it be a DVD, audiobook, or paperback. Note that the material type “Book” refers to a hardcover book.
Polaris 5.0 ILS

5. **Holdable** – If a book is holdable, anyone can place a hold on it. If it is holdable by *Patrons from this branch only*, this means the branch that owns the item record can only place holds on the item. Consult with your supervisor about when it is appropriate to check this box.

_Circulation_

This screen shows an example of the *Circulation* view of the Item Record workform. This screen clearly displays loads of useful information. It is especially useful when trying to track down a missing item, or an item that might not have come in on time from the delivery.

If an item is returned with missing parts, but the patron claims they received it with missing parts, having the *Last borrower* on file is especially useful. To receive even more past circulation information, open a ticket. Having *Last circulated* on file is useful as well, if looking for a missing item. If an item circulated recently, chances of finding it are higher. If it last circulated four years ago, chances of finding it are less likely.
This screen shows an example of the *Source and Acquisition* view of the Item Record workform.

This view allows users to input funding source and the donor information if so desired. The donor organization field is searchable with the *Item Record Find Tool*. This view also provides users with useful statistics such as *First available date* (above and to the right of *Funding source*) as well as *Year-to-date circulation*, *Previous year-to-date circulation*, and *Lifetime circulation*. 
On *Notes and Notices*, one can view any reminders, and overdue notice dates for the item record being viewed, if any exist.

Additionally, and perhaps most importantly, this is the screen where users can set item blocks. Creating item blocks are explained in detail later in this manual, but the user can choose the type of *Block* being created by choosing an option from the *Library assigned* dropdown, and then enter text in the *Free text* field. The dropdown item chosen will preface the free text in the note that pops up when the item is checked in or out. The purpose of item blocks is to alert circulation staff at the time of check in or check out when an item has extra materials that need to be counted, are damaged, missing parts, in need of repair, or in need of any extra attention.
History

The *History* view shows an item’s “footprints”. It displays the history of the item record from every time it has been scanned in or out of a Polaris workstation. It displays the date, assigned branch, status, action, location, and the Polaris username and terminal server ID of the workstation that each action was performed on. This can be useful in tracking down a lost or missing item. The information in this panel only remains for one year. Further information can be gathered by opening a support ticket.
Creating an Item Record Template

The greatest benefit of creating an item record template is that it gives staff a shortcut when creating item records. Typically, libraries create item record templates for each type of material in your library. Templates need only be created one time for each type of material in your library. For example, there might be a template for new adult fiction, adult fiction, new adult nonfiction, adult nonfiction, new juvenile fiction, and so on. When your technical processing staff opens a template, the majority of an item record is already automatically populated with information that never changes from item to item.

A new template can be created by using the keyboard shortcut **CTRL+N** or by clicking on the **New** icon on the shortcut bar, which will bring up the window pictured to the right. From here, the user can select **Cataloging Objects** from the dropdown box beside the word **View**, and then select **Item Template**. Then, click OK.
1. **Name:** Use this field to name the template. Use your branch abbreviation (i.e., FLO for Florham Park, or MMT for Morristown/Morris Township).

2. **Template owner:** Select your library from the dropdown field. If you are a library with branches (such as Parsippany) please consult your technical services supervisor for correct methodology regarding owner and assigned branches.

3. **Display in PAC:** Unless a magazine or ILL template is being created, ensure the “Display in PAC” box is checked.

4. **Owner & Assigned:** The “Owner” and “Assigned” branches should both be your library. If you are a library with branches (such as Parsippany) please consult your technical services supervisor for correct methodology regarding owner and assigned branches.

5. **Collection:** This field must be filled in to provide an accurate location for the item. Do not leave this field blank, or it will be much harder for patrons to find the location of the library’s items.

6. **Shelf location:** This field is optional. Many libraries prefer to use shelf location to specify whether or not the item is new, although there is an option in Collection to do so as well. Please check with your supervisor about how to categorize items in your library.

7. **Temporary location:** This field is not searchable, and exists only for the user’s convenience.

8. **Circulation status:** This is set to ‘In-Process’ by default. Remember to check an item In to activate a hold. If an item is not yet available, one can set the status to On-Order instead.

9. **Circulation parameters:** Fill in these choices from the dropdown menus. Renewals will be two for most items. Check with your supervisor, or check items already on the shelf to verify the correct choice.

10. **Stat code:** Choose from the values in the pull-down menu: Adult, Juvenile, Middle School, Teen/YA. One can search and limit by this field.

11. **Call Number:** Choose “Dewey” for scheme.

12. **Holdable:** If an item is nonholdable, do not check this box. Nonholdable items allow zero renewals. If the item is holdable only to your own patrons, this box and the “Patrons from this branch only” box must be checked. If your library has branches, choose “Holdable” and “Patrons from this library and branches.”
When an item template is chosen, the item template auto-completes most fields in the item record. To complete the item record, all that is needed is the barcode, call number, material type (when applicable), the price (optional) and notes (optional).
Linking an Item to a Bibliographic Record

When linking an item to a bibliographic record, the best way to find the correct record is to scan the ISBN using the Bibliographic Record Find Tool (F12).

If the item is a DVD or CD, it might not have an ISBN but a UPC number. The user can change the parameters in the Find Tool to search by UPC instead.

Once a bibliographic record comes up, it is recommended to view it and briefly read the MARC record to ensure that the record being viewed is accurate to the item being linked. Then, one can either select the Create Item Record icon (pictured to the right) or, from the Find Tool, right-click on the record, hover over Create and select Item Record (pictured above). This brings up another workform (pictured on the next page).
Select from the Template list which kind of item it is. Your library should use a pre-set list of templates for every subset of items.

Here, one can begin filling out the call number information (a detailed explanation of call numbers is explained on the next page) and the price, and scan the barcode of the material. Change the material type if it is not already listed in the template. Select a shelf location if applicable in your library and then select OK.

Look over the item record and be sure that everything looks complete. The following page shows an example of a complete item record. This is the workform that other library staff members come across when looking for more information about an item, and that is eventually translated to the PAC, so it is important that the information is filled in as accurately as possible. Please remember the item remains In-Process until checked in.
A completed item record in Polaris
Do Less Work and Get More Done!

If the user is creating many of the same type of item records (such as 50 new adult fiction books) one can temporarily set an item template as default when creating item records.

First, select File and then New from the Shortcut Bar (CTRL + N). Beside View, select Cataloging Objects and then select Item Record. Then choose Existing Template and select the template desired as default. Then select Make session default at the bottom. Click OK to save the selection.

To revert to default settings, open the same settings, as outlined above and the Make session default text will read Clear session default instead. Check this box. When the user logs out, the default automatically returns to none.

A Quick Lesson on Call Numbers

Prefix contains terms like:
FICTION, JFICTION, YAFIC, LTFIC, LT, REF, ATLAS, STUDENT, CAREER, NJ, JSERIES, JREF, E, ER, EJ, TEEN, FICTION, CD, BOCD, FICTION, GRAPHIC, BIOG, JBIOG, OVERSIZE, BUSREF, DVD.

Class contains:
A Dewey number or ANSCR music classification number.

Cutter contains:
The remainder of your call number, which is usually the author’s last name.

Suffix may contain:
The remainder of your cutter if you double cutter.

Volume contains:
Volume or year. V.1, V.12, V.13, with no space between v. and the number
Linking a Magazine to a Bibliographic Record

Introduction

When linking a magazine to a bibliographic record, a slightly different method must be followed.

Before the act of linking an individual magazine, it is important to understand the way magazines exist within PLS and the PAC. Since it would be overwhelming to have patrons see each individual magazine issue as an individual item record, individual magazine records are hidden from public view. Instead, what appears to the public is something known as a Title Record. Title records are basically placeholders: dummy records that exist to represent an entire subscription of a magazine.

If one were to search in the PAC for the magazine National Geographic, they would be looking at the title record for that magazine subscription. The libraries that show up as owning that subscription are libraries that own an active subscription to that magazine.

That is why, in creating a magazine item record, it is important to ensure that the library also has a title record for that subscription. If a user is linking an ongoing magazine subscription that the library has been receiving for a while, there should already be a “placeholder” item record linked, indicating that the library has this magazine. If a library stops their subscription to a certain magazine, it is necessary to delete their item record.

Because of the way this is configured in PLS, it is not possible for patrons to place requests for individual magazine issues. If a patron tries to place a request through the PAC, they will receive the below message:

MAIN does not allow holds on magazines.

Linking

A member of the cataloging staff creates individual bibliographic records in one of two ways for each library. The first option is to create one record for every month of the year. The alternate way is to create just one record for every year, and then to specify the month in another area.
The downside of creating an individual record for every month of the year, is that some issues end up being linked to a month which does not match the issue. For example, a December issue may come in November, and it is linked to the November magazine title record, causing confusion for the patron when viewing “My Account”.

All bibliographic magazine records follow the same title format: the abbreviation ‘MAG’, two dashes, the library’s abbreviation (e.g., BER for Bernards), two more dashes, and the four digit year. For example, Bernards Township Library’s magazine record for 2017 would appear as such MAG--BER--2017.

In order to add an item record, one must perform a bibliographic records search, and search for the title text in the above format (dashes not needed) as pictured below.

Similar to the creation of other item records, one must double-click the search result and open the record, and then select the appropriate icon to create an item record.

Templates can be created to make creating magazines much easier. Most libraries already have a magazine record template, but in the case of creating a new template, the instructions in the previous section Creating an Item Record Template apply except please set the Collection to Magazines and un-check Loanable outside system and holdable.

The magazine title should be placed in the Cutter section of the call number, as pictured to the right. The volume field should read the year and month in the following format: 2017:DEC. For seasonal issues, it should read: 2017:WINTER, and for joint issues it should read 2016:OCT-NOV.

The following page shows a completed and correct magazine item record for reference when creating templates or records.
Polaris 5.0 ILS
Linking Multiple Copies of an Item

Sometimes, it is necessary to link multiple copies of an item, such as bestsellers, summer reading titles or book group orders. In Polaris, there is an easy way to do this.

To begin, scan an ISBN or UPC and create a new item record as usual. In the New Item Record Options workform, change the Items total to however many items of that record are being created (pictured below).

Select a template as usual, add the price, correct the call number information, scan however many barcodes are applicable (three in this example), change the material type as necessary and click OK.

The amount of item records specified will open. One may choose to change the hold settings in each item record. In this case, three workforms will be open. Make sure to save each one.
Polaris 5.0 ILS

Pulling Metadata from Items Not in the ILS

Sometimes, the bibliographic record in which one is trying to link is not available in Polaris. Usually, this means that it has not been cataloged yet.

Occasionally, the book has been cataloged in other library systems outside of MAIN and there is a way to search and pull the metadata in from other databases.

Open the Bibliographic Records Find Tool and set it to search by ISBN.

Select the Databases tab.

Choose the Select All option to the Right.

Select the General tab and scan an ISBN.
Beneath the Count column in the image on the previous page, look for a database with a number higher than zero. If there is a number higher than zero beside PAC, that means there is a bibliographic record in the PAC for that item that was overlooked.

Double-click to open the record if one is found. This opens the window pictured below.

Right click on the desired item record and select Preview. This opens the window pictured below.

Please note that the process described below will most likely be changing in early 2017.

Copy and paste the highlighted information to an e-mail and send it to cataloging. The summary portion need not be sent. Often, the preview does not include the Description and thus, measurements need to be taken manually.

If the item does not show up this way, it is necessary to manually send the item up to cataloging.

In order to send an item to cataloging, the following requirements must be met:

- Must include the name of the requesting library
- For books, include the author, title, ISBN, page number, height in centimeters and date of publication.
- For media, include the number of CDs/DVDs, UPC, ISBN and date of publication.
If it is a self-published or locally published item, please also send publishing information as well as any subject headings that should be in the record.

Please include all of this information in an e-mail, and send it to the designated cataloging e-mail address. Please ask your circulation supervisor or director for this information.
Creating Item Blocks

Item blocks are necessary if an item has extra materials, such as several discs, a booklet, a map or something of note that should be pointed out to the circulation staff. Item blocks appear when an item is checked out, and when an item is checked back in.

Item blocks are created on the Notes and Notices view of the Item Record workform, pictured in full at the beginning of the Technical Services section. The user can categorize the block using the Library Assigned dropdown box, as pictured below.

These categories will preface the kind of note that is being created, helping the circulation staff to best understand the note.

In the above example, there is a Multiple Items-Check Contents block, which will prompt the circulation staff to manually confirm the presence of all the item's contents before checking it in or out. The note specifies the exact amount of contents that should be present.

Notes can also be used to document damaged items, items with missing pieces, items that need to be repaired, or other miscellaneous situations that should be brought to the attention of the circulation staff.
Creating Record Sets

Record sets make it possible to edit thousands of item records at a time, effectively saving hours of tedious labor.

One example of when one might need to create a record set is when a user is changing the shelf location of a large quantity of books from “New” to “None”. It is possible to change each book one by one, but the process is tedious.

There are two ways to create a record set. One way is to open a new record set workform, and the other way is to perform a search and create a record set based on the results of that query. Both methods are useful for different circumstances.

When dealing primarily with physical materials, such as a stack of books that need to be changed over from Shelf location: New to Shelf location: None, creating a blank record set is often the way to go.

A blank record set workform can be created by using the keyboard shortcut CTRL+N and then selecting Cataloging Objects from the dropdown box beside View. Then, click on Record Set and then click OK.

There is an option to choose one of three types of record sets: authority, bibliographic and item (as pictured to the right). Most often, the user will be creating Item record sets. After selecting Item, click on OK to open the blank form.

The alternative way to create a record set is to perform a search. The best Find tool to use for this purpose is the Item Records Find Tool. It can be found within the blue orb on the shortcut bar, or by using the CTRL+ALT+F9 keyboard shortcut.

The user can narrow down the search by using the Find Tool filters and limits. Limiting the search by library branch using the Branches tab is usually a good first step.

Once the desired results are open, adjacent records can be selected by pressing down the SHIFT key and selecting the first in a row of records, and while still holding down the SHIFT key, selecting the last in a row of records. Alternatively, one may hold down the CTRL key and click on desired records to select one at a time. Once the desired records have been selected, right click on any one selected record, hover over Add to Record Set and choose New.

The next page displays the Item Record Set workform. Here, one can scan books in bulk by barcode and them apply a change (or changes) to them, such as marking them no longer new, marking them new, changing their call number prefix, or any number of other changes.

**Warning:** There is no simple undo feature when bulk-changing items. The only way to undo a bulk change is to bulk change items back to what they were before.
Record sets must be saved to be put into effect. It is recommended that record sets remain short and consist of no more than 100 items at a time to avoid losing a long list of items in case of a crash or a mistake.

Above, notice Add by Scanning, which the mouse cursor hovers over in the image. There is also a CTRL+K keyboard shortcut for this.

When one has scanned all of the items and one is ready to make changes, Bulk Change icon (pictured to the right) should be clicked, which appears to the right. The keyboard shortcut for this icon is CTRL+B.

Using the Bulk Change icon or shortcut brings up a comprehensive mini item record workform with many of the options one might find on the regular item record workform. Any of the changes that are made here will apply to every single one of the items scanned into the record set.
Opening Record Sets

In order to open a record set, one must use the Item Record Barcode Find Tool, which can be accessed by the keyboard shortcut CTRL+ALT+F9.

Change the Object field to Record Sets. Then, type the record set name into the For field. If the user matches the first few characters of the Name field, the item record will appear in the results, as shown in the image below.

One can verify that one has selected the correct record set by verifying the Owner and the Creation Date columns.
Appendix A: Configuring a Receipt Printer in PLS

In order for Polaris to successfully communicate with the receipt printer, it must be configured in the options page of each appropriate workform.

At minimum, the receipt printer should be configured on the Check Out, Check In and Patron Status workforms. It can be optionally configured on the Item Record and Hold Request workforms.

To configure a receipt printer in the desired workform, navigate to the top of the workform and click on Tools, and then Options.

In the case of the Patron Status and Item Record workforms, a patron record or item record must be opened before one can access the Tools menu. In this case, it is fine to open a random record, as changing one record will make the change to all of them.

This will open the following pop-up window pictured to the right.

It is important to note that the receipt printer must be selected from the Printer: dropdown field and the Driver: dropdown field. Both the Printer and Driver fields should have the model of the receipt printer selected and should match each other. If either of these are incorrect, the receipts will not print.

The options going down the left side of the box are as follows:

Check out receipt – This setting enables check out receipts listing the items and due dates the patron has checked out. This is optional, like in the cases of libraries that use due date stickers instead of paper receipts. It is only an option on the Check Out and Patron Status workforms.
Polaris 5.0 ILS

*Fine receipt* – This setting enables receipts upon payment of a fine. This is optional but recommended. It is not an option on the *Item Record* workform.

*In-transit slip* – This setting enables in-transit slips to print. This is required.

*Hold pickup slip* – This setting enables hold slips to print. This is required.
In Polaris, if a price is not set within an item record and that item is subsequently lost or damaged, a default price will be charged to the patron account. Below is a list of the current replacement fee defaults set within PLS.

<table>
<thead>
<tr>
<th>Material Type</th>
<th>Replacement Cost</th>
<th>Processing Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Art</td>
<td>$50.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Atlas</td>
<td>$70.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Audiobook (Cassette)</td>
<td>$75.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Audiobook (CD)</td>
<td>$75.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Audiobook (Playaway)</td>
<td>$75.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Blu-ray</td>
<td>$35.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Book</td>
<td>$35.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Book Club Kit</td>
<td>$35.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Downloadable Audiobook</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Downloadable eBook</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>DVD</td>
<td>$35.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>eBook</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Equipment</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>eReader</td>
<td>$0.00</td>
<td>$5.00</td>
</tr>
<tr>
<td>Game/Toy</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Government Doc</td>
<td>$20.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>I.L.L. Item</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Large Type Book</td>
<td>$40.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Large Type Paperback</td>
<td>$40.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>LP Record</td>
<td>$10.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Magazine</td>
<td>$7.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Microfiche</td>
<td>$15.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Microfilm</td>
<td>$30.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Multimedia Kit</td>
<td>$50.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Museum Pass</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Music Cassette</td>
<td>$10.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Music CD</td>
<td>$25.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Newspaper</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Paperback</td>
<td>$25.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Readalong</td>
<td>$25.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Reference Book</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Rental AV</td>
<td>$35.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Rental Book</td>
<td>$35.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Score</td>
<td>$40.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Slide</td>
<td>$50.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Software</td>
<td>$50.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Talking Book</td>
<td>$10.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Product</td>
<td>Price</td>
<td>Fee</td>
</tr>
<tr>
<td>------------------</td>
<td>--------</td>
<td>------</td>
</tr>
<tr>
<td>VHS</td>
<td>$35.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Video Game</td>
<td>$60.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Video Playaway</td>
<td>$100.00</td>
<td>$5.00</td>
</tr>
</tbody>
</table>
# Appendix C: Keyboard Shortcut Master List

## Polaris Keyboard Shortcuts

<table>
<thead>
<tr>
<th>Action</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select All</td>
<td>CTRL+A</td>
</tr>
<tr>
<td>Copy</td>
<td>CTRL+C</td>
</tr>
<tr>
<td>Delete</td>
<td>CTRL+D</td>
</tr>
<tr>
<td>Log on, log off</td>
<td>CTRL+L</td>
</tr>
<tr>
<td>New</td>
<td>CTRL+N</td>
</tr>
<tr>
<td>Open</td>
<td>CTRL+O</td>
</tr>
<tr>
<td>Print current view</td>
<td>CTRL+P</td>
</tr>
<tr>
<td>Print list view</td>
<td>CTRL+SHIFT+P</td>
</tr>
<tr>
<td>Reports</td>
<td>CTRL+R</td>
</tr>
<tr>
<td>Save</td>
<td>CTRL+S</td>
</tr>
<tr>
<td>Paste</td>
<td>CTRL+V</td>
</tr>
<tr>
<td>Launch Browser</td>
<td>CTRL+W</td>
</tr>
<tr>
<td>Cut</td>
<td>CTRL+X</td>
</tr>
<tr>
<td>Redo</td>
<td>CTRL+Y</td>
</tr>
<tr>
<td>Undo</td>
<td>CTRL+Z</td>
</tr>
<tr>
<td>Clear</td>
<td>DELETE</td>
</tr>
<tr>
<td>Topic or workform help</td>
<td>F1</td>
</tr>
<tr>
<td>Open Check-in workform</td>
<td>F2</td>
</tr>
<tr>
<td>Open Check-out workform</td>
<td>F3</td>
</tr>
<tr>
<td>Refresh</td>
<td>F5</td>
</tr>
<tr>
<td>Find patron (status)</td>
<td>F6</td>
</tr>
<tr>
<td>Find patron (registration)</td>
<td>F7</td>
</tr>
<tr>
<td>Properties</td>
<td>F8</td>
</tr>
<tr>
<td>Find bibliographic records</td>
<td>F12</td>
</tr>
<tr>
<td>Find item records</td>
<td>CTRL+ALT+F9</td>
</tr>
</tbody>
</table>

## Shortcut Bar: Menu Access Keys

<table>
<thead>
<tr>
<th>Menu</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>File</td>
<td>ALT+F</td>
</tr>
<tr>
<td>Acquisitions</td>
<td>ALT+A</td>
</tr>
<tr>
<td>Serials</td>
<td>ALT+S</td>
</tr>
<tr>
<td>Cataloging</td>
<td>ALT+C</td>
</tr>
<tr>
<td>Patron Services</td>
<td>ALT+P</td>
</tr>
<tr>
<td>Circulation</td>
<td>ALT+R</td>
</tr>
<tr>
<td>Administration</td>
<td>ALT+M</td>
</tr>
<tr>
<td>Utilities</td>
<td>ALT+U</td>
</tr>
<tr>
<td>Window</td>
<td>ALT+W</td>
</tr>
<tr>
<td>Help</td>
<td>ALT+H</td>
</tr>
</tbody>
</table>
### Find Tool Access Keys

<table>
<thead>
<tr>
<th>Tool</th>
<th>Access Keys</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object box</td>
<td>ALT+O</td>
</tr>
<tr>
<td>By box</td>
<td>ALT+B</td>
</tr>
<tr>
<td>Type box</td>
<td>ALT+Y</td>
</tr>
<tr>
<td>For box</td>
<td>ALT+F</td>
</tr>
<tr>
<td>Search button</td>
<td>ALT+S</td>
</tr>
<tr>
<td>Stop button</td>
<td>ALT+T</td>
</tr>
<tr>
<td>New Search button</td>
<td>ALT+N</td>
</tr>
<tr>
<td>Help button</td>
<td>ALT+H</td>
</tr>
<tr>
<td>Retrieve all records in search results (karate chop)</td>
<td>CTRL+SHIFT+A</td>
</tr>
<tr>
<td>Display context menu</td>
<td>SHIFT+F10</td>
</tr>
</tbody>
</table>

### Workforms: Menu Access Keys

<table>
<thead>
<tr>
<th>Menu</th>
<th>Access Keys</th>
</tr>
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<tbody>
<tr>
<td>File</td>
<td>ALT+F</td>
</tr>
<tr>
<td>Edit</td>
<td>ALT+E</td>
</tr>
<tr>
<td>View</td>
<td>ALT+V</td>
</tr>
<tr>
<td>Links</td>
<td>ALT+L</td>
</tr>
<tr>
<td>Tools</td>
<td>ALT+T</td>
</tr>
<tr>
<td>Help</td>
<td>ALT+H</td>
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</table>

### Workforms: Shortcuts

<table>
<thead>
<tr>
<th>Action</th>
<th>Access Keys</th>
</tr>
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<tbody>
<tr>
<td>Workform Help</td>
<td>F1</td>
</tr>
<tr>
<td>Print (current view)</td>
<td>CTRL+P</td>
</tr>
<tr>
<td>Print (list view)</td>
<td>CTRL+SHIFT+P</td>
</tr>
<tr>
<td>Display context menu</td>
<td>SHIFT+F10</td>
</tr>
<tr>
<td>Expand tree</td>
<td>SHIFT+ALT+*</td>
</tr>
<tr>
<td>Collapse tree</td>
<td>SHIFT+ALT+-</td>
</tr>
<tr>
<td>Move among open workforms</td>
<td>ALT+TAB</td>
</tr>
<tr>
<td>Switch views in a workform</td>
<td>CTRL+TAB</td>
</tr>
<tr>
<td>Close workflow</td>
<td>ALT+F4</td>
</tr>
<tr>
<td>Save record</td>
<td>CTRL+S</td>
</tr>
<tr>
<td>Delete record</td>
<td>CTRL+D</td>
</tr>
<tr>
<td>Properties</td>
<td>F8</td>
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## Revision History

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<th>Description</th>
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<tr>
<td>1.0</td>
<td>September 14, 2016</td>
<td>First draft created.</td>
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<tr>
<td>1.1</td>
<td>October 06, 2016</td>
<td>Spelling and grammar corrected, Appendix A and Revision History pages added.</td>
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<tr>
<td>1.2</td>
<td>October 10, 2016</td>
<td>Additional spelling and grammar corrections made, Appendix B and C added.</td>
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<td>1.3</td>
<td>November 11, 2016</td>
<td>Changes made on pps 61-62, 64-72 and 77. “Locating Item Records” section added to page 46.</td>
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<td>1.4</td>
<td>December 5, 2016</td>
<td>‘Linking a Magazine to a Bibliographic Record’ section created on pps 77-79 and added to the table of contents &amp; index. ‘Using the ILL Function’ created on pps 56 and added to the table of contents &amp; index.</td>
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<tr>
<td>1.5</td>
<td>November 17, 2016</td>
<td>‘Pulling Metadata from Items Not in the ILS’ removed that it only works with ISBN. The search works with other terms, but ISBN is the most accurate.</td>
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