Polaris New User

Introduction to Polaris

- Polaris works in a Windows environment and therefore follows Windows conventions.
- Functions are color coded. All windows that open in **Circulation** and **Patron Services** will have a **RED** bar on the left side, **Cataloging** is **BLUE**. This is a quick visual clue on where you are.
- Select **Cataloging** to work with bibliographic and item records.
- Select **Patron Services** and **Patron Status** to work with patron records and do patron accounting.
- Select **Circulation** for Check In, Check Out, and Holds.
- Your access to Polaris functions and records is limited only by the permissions set up for your user name. Circulation staff usually have limited functionality, focusing primarily on Check In, Check Out, Patron Services, and Item/Bib (Bibliographic) records.

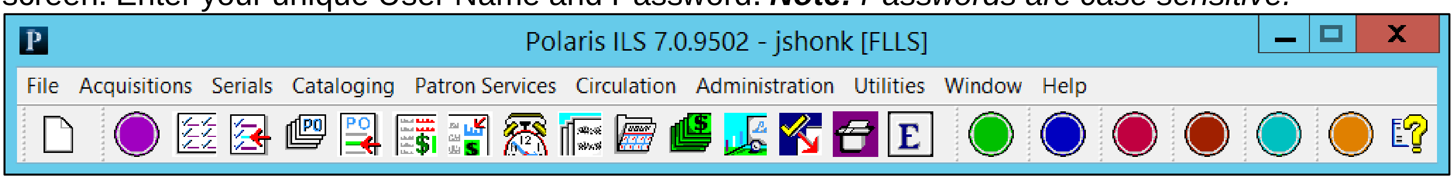
Log On/Off

It is critical to log on and off correctly.

***WARNING:* When closing Polaris, simply clicking on the X on the toolbar or the Remote Desktop without logging off may cause issues across the entire system! Please log off properly every time, see instructions below.**

To Log On

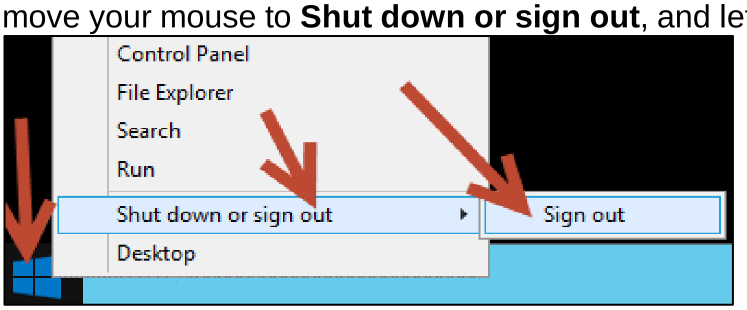
Double click on the Remote Desktop/Polaris icon on your computer's desktop. The Remote Desktop will open on your screen and you can double click the Polaris icon along the left-hand side of the screen. Enter your unique User Name and Password. ***Note:*** *Passwords are case sensitive.*



Having trouble with your receipt printers? You may have logged onto the Polaris toolbar before the printers were able to map completely. It is recommended that you wait a few seconds before opening the Polaris toolbar to ensure that everything loads correctly.

To Log Off

On the toolbar, go to the **File → Log Off** or **Ctrl L**, then click **OK**. Next, go to **File → Exit** to close the toolbar. Lastly, go to the Windows button in the bottom left-hand corner of the screen, right click, move your mouse to **Shut down or sign out**, and left click on **Sign out**.



Navigation

The Polaris Shortcut Bar offer several drop-down menus with tools for you to use. There are also multi-colored buttons that serve as shortcuts. Below are the most common sections for circulation desk staff. ***Please Note:*** *If you don't know what an icon means, hover your mouse pointer over it. A message will pop up with the title of the icon.*

- **Cataloging (Blue Button)**: BIB (Bibliographic) Records, Item Records, Record Sets, etc.
- **Patron Services (Red Button)**: Patron Records.
- **Circulation (Maroon Button)**: Check Out, Check In, Patron Status, Request Manager, etc.
- **Utilities (Orange Button)**: Reports and Notices, etc.

Keyboard Shortcuts

Select All	**Ctrl A**
Log On, Log Off	**Ctrl L**
Print Current View	**Ctrl P**
Save	**Ctrl S**
Help	**F1**
Check In	**F2**
Check Out	**F3**
Find Patron Status	**F6**
Open Patron Registration	**F7**
Properties	**F8**
Switch between Patron Registration & Status	**F9**
Bibliographic Find Tool	**F12**
Retrieve all records in search results	**Ctrl Shift A**

Patron Records

Patron Records include personal identification information about the patron; their name, barcode, address, phone number, expiration date, email address, password and statistical information. These records include information from the registration forms that the patrons filled out when they originally obtained a library card. If your library has a Datalogic 2D barcode reader, most of the patron information can be obtained from a NYS License by scanning the 2D barcode.

WARNING: *It is important to realize that there is sensitive information in both Patron Registration and Patron Status.* ***DO NOT*** *give this information out to anyone other than the patron unless you have their explicit written permission (excludes situations with parent/guardians and children). If a member of law enforcement requests any information regarding a patron's records, they have to submit a warrant to Finger Lakes Library System because the system owns all Polaris records.*

Registering New Patron

- Click once on the **New** icon in the toolbar or **File → New**.
- Scroll down until you see Patron Record.
- Select Patron Record and select **OK**.
- Fill in the appropriate fields like barcode, name, patron code, address, phone number, and email address. Please don't enter text into the email or phone fields, only email addresses and phone numbers should be entered into these fields.
- Field names in **BOLD** indicate a required field which must be filled in before saving the record.
- Click on the **Add** button Add... to add an address.
- Click on the **General** button to view the second screen.

- Fill in the appropriate fields like statistical class, password (by default the last 4 digits of their primary phone number), birth date, school district, and staff initials.
- Click on the save button or use **Ctrl S** to save the record.

Duplicating Patron Records

- Access the Patron Find Tool in **Patron Services → Patron Records** or **F7**.
- The **For** box should contain your search criteria, ex. patron name.
- Double click on the name in the results window to open the record.
- Click once on the **New** icon in the Menu Bar.
- Select **Copy Existing Work Form** in the window and click **OK**.

- All fields are duplicated except the barcode field and password field. Change the appropriate fields and save the record.

Other Tips for Patron Registration

- Try to get an email for notifications as it cuts down on paper notices.
- Include a full birthday, which is important for statistical and reporting purposes. It will not be shared.
- Choose the correct patron code.
- Your library may put special emphasis on PSTAT3 and the Local Use fields.
- Check with your library supervisor for other special procedures.

WARNING: *Never include a Driver License number, EBT number, credit card number, Social Security number, or other sensitive personal information in the patron's record.*

Updating Expired Registrations

Open the Patron Registration, click on **Tools → Update Check Dates**. Then click **Save**. This will update the Expiration and Address Check Dates based on the library the patron is registered at. The Expired Registration block will automatically be removed.

Patron Status

Contains the functionality associated with the patron's activity *within* the library. Includes any and all financial transactions, items out, holds placed, notice history, other patrons associated with their record, blocks, lost and claimed returned items, and more.

Renewals

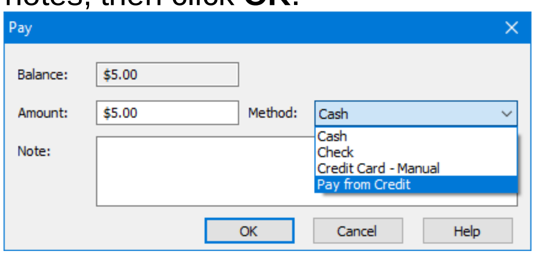
- Open the patron's record in **Patron Status** or **F6** and select the **Items Out** view.
- If you are renewing one or multiple items, select the items in the **Items Out** list and click **Renew** .
- If you are renewing all items, click **Renew All** .
- To choose a specific date, select the items and click **Special Renew** .
- The new due dates are displayed and a receipt will print automatically.

WARNING: *During renewal, the following messages may appear relating to holds. "This item satisfies a hold...Do you want to hold the item?" The item satisfies a hold request for another* *patron. You should **NEVER** renew an item if there is a hold against it especially if that item belongs to another library. "Transfer this item to library for hold?" The item fills a hold request for a patron at another library. You should **NEVER** renew an item if there is a hold against it.*

Paying Fines

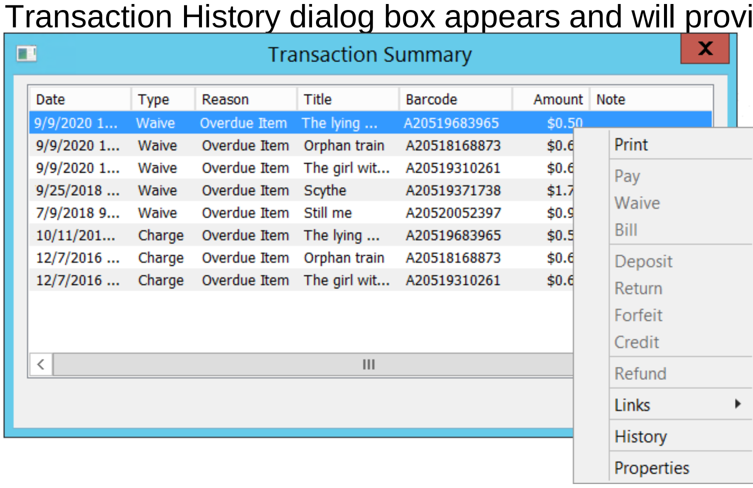
- Search for the patron by going to **Circulation → Patron Status** or **F6**. Double click on the patron's name, then go to the **Account** screen.
- Select the appropriate charge by clicking on the item. Then select the appropriate action, see list of actions below:

- If you selected **Pay**, type in the amount the patron is paying. Click on the drop down menu next to **Method** to indicate their method of payment (*Do not use Credit Card*), add any appropriate notes, then click **OK**.



Transaction Summary

- You can view the account activity for a patron in the **Transaction Summary** dialog box.
- First, open the patron's record in **Patron Status** and then **Account** view.
- If the transaction has been reconciled, click  to display the **Transaction Summary** dialog box.
- Right-click on a transaction line item, and select **History** from the context menu. The Transaction History dialog box appears and will provide you with more information.



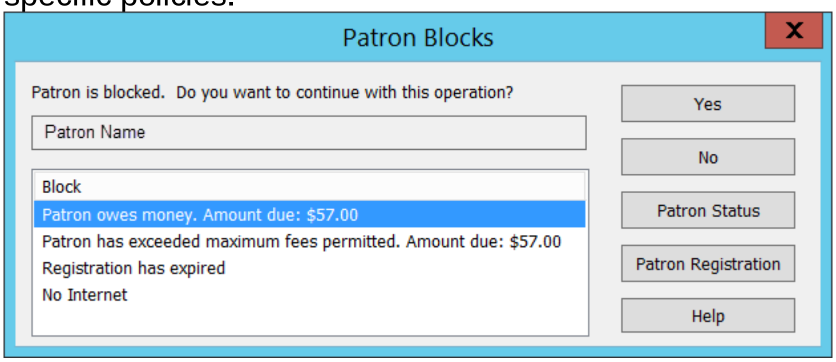
- You can view additional information about each transaction, including an item's check-out date and due date, if applicable. Right click a line item in the **Account** list or the **Transaction Summary** dialog box, and select **Properties** from the menu.

Check Out

- Go to **Circulation → Check Out** or **F3.**
- Scan the patron's barcode or click on the **Find** button to search for the patron by name.
- If the patron has a block, a window will pop up.
- Scan item barcode(s).
- When all items have been checked out, hit **Enter** on your keyboard to complete the checkout process and print a receipt.
- You can also access various areas of the patron's registration and status using these icons:

Patron Blocks that May Display at Checkout

If there is a block on the Patron's Record it will display during Check Out. Check with your library for specific policies.



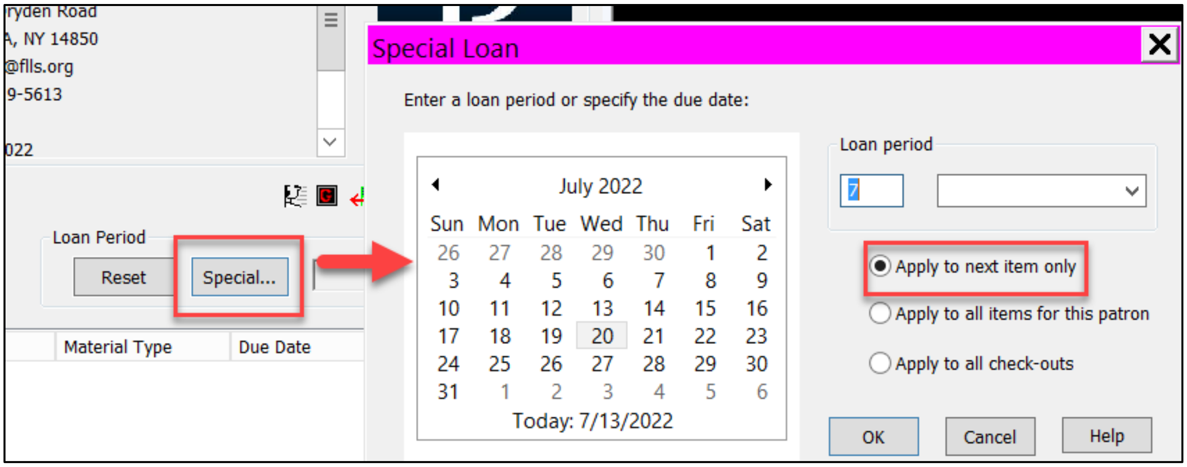
- Click **Yes** to continue or **No** to end checkout.
- If the patron owes money, select **Patron Status** and collect the fine.
- If the patron has overdue items, select **Patron Status** and renew the items if possible. ***Please Note:*** *if the item is on hold for someone else it CANNOT be renewed.*
- If the patron has a hold waiting to be picked up, check the item out to the patron.
- If the Patron's card has expired, select **Patron Registration** and update the registration date. Remember to delete the block from the patron's account in the Patron Status **General** page.

Checking Out an Out-of-System Interlibrary Loan (ILL) Item

Out-of-System Interlibrary Loan items will have a different loan period than regular items.

WARNING: *Do not renew ILL items. If a patron would like to renew an ILL item, the member library should contact ill@flls.org to request a renewal. If the request is approved by the lender, the ILL department will update the due date.*

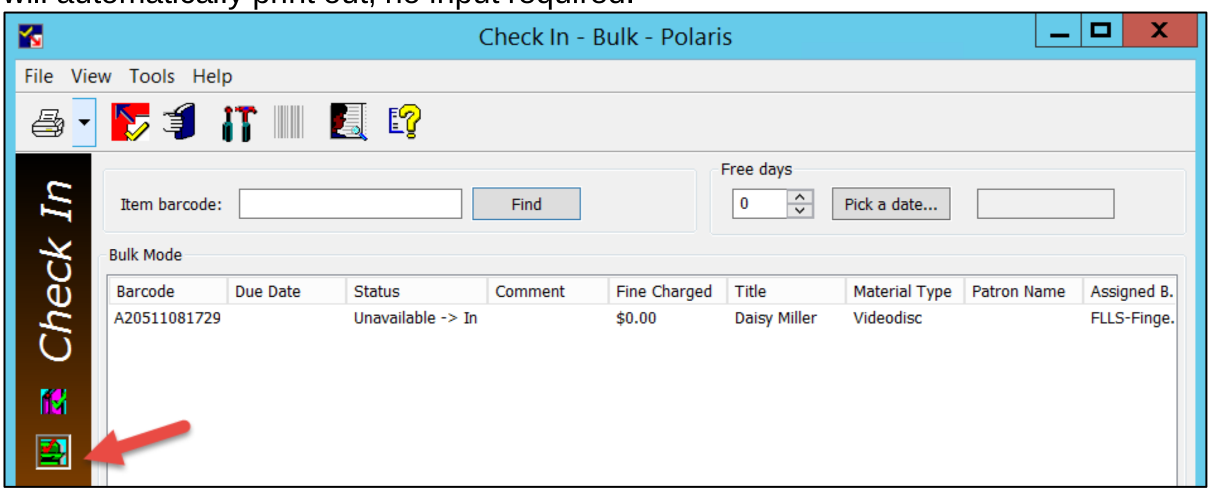
- Open the Check Out window. Scan the patron's card or locate them using the **Find** button.
- Click on the **Special…** button in the Check Out window.
- Locate the correct due date on the item's yellow book band. Select the due date using the calendar.



- Make sure that "*apply to next item only*" is selected and click **OK**.
- Scan your item. Clear the block. You may now check out regular items for the patron or hit **Enter** on your keyboard to complete the transaction.

Check In

- Go to **Circulation → Check In** or **F2**.
- Scan item barcode(s).
- **Bulk Mode** is the recommended method of Check In. Using the **Bulk Mode** check in allows you to check in multiple items from multiple patrons and the system automatically charges the patron account for any fines incurred. Slips for items on hold or that belong to another library will automatically print out, no input required.

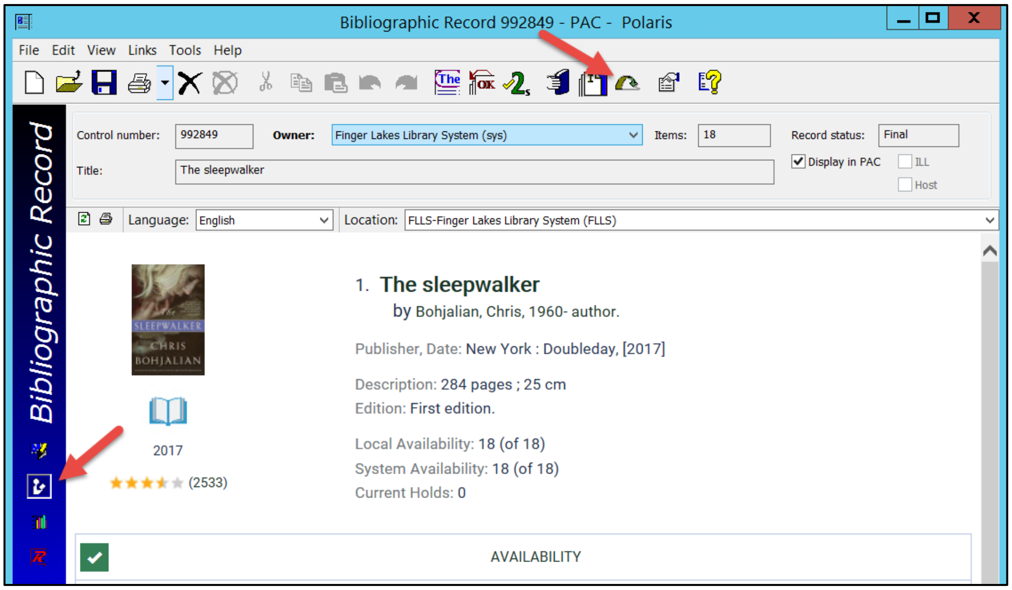


- "*Check for X discs*" and other blocking notes will continue to pop up so remember to pay attention to the screen.
- To change the status of an item (ex. In-repair), double click on the item. Make the necessary changes and remember to save.

Bibliographic and Item Records

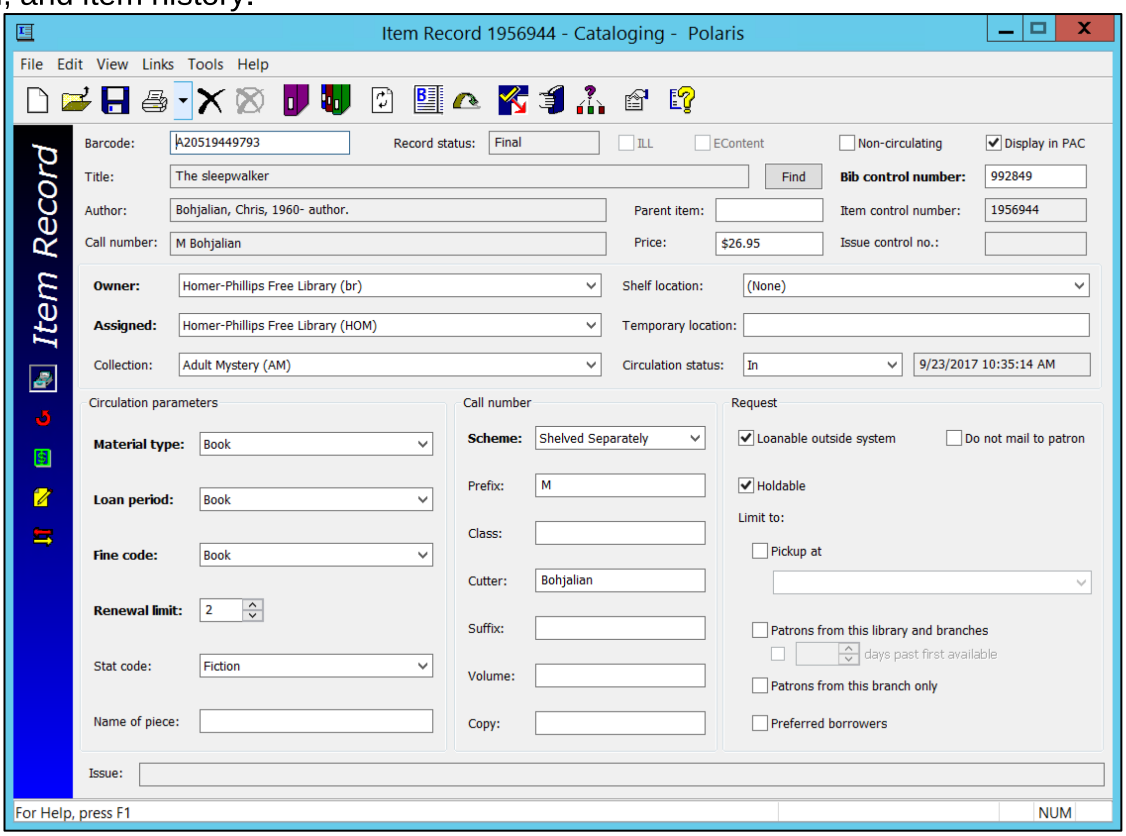
Bibliographic Records, a.k.a. Bib Records

These are records for specific titles in the Finger Lakes Library System catalog. Each bib record is associated with a specific ISBN or UPC. Each format for a specific title will have its own bib record: Book, Large Print, DVD, Audio Book on CD, eBook, Audiobook, Music CD, etc. Bib Records show cataloging information, connect to the PAC, and link to available Item Records.



Item Records

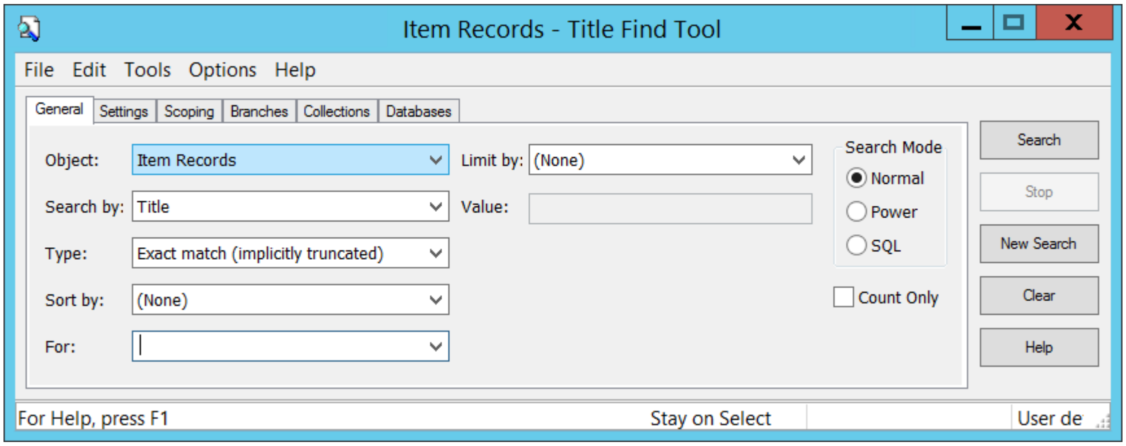
These are the records for specific library items in the catalog. Each item will have its own record and unique barcode. Item Records show circulation status, call number, owning library, price, circulation information, and item history.



Searching

The Find Tool can be used to search for item records, bibliographic records, templates and more. There are 6 tabs: the General tab, the Settings tab, the Scoping tab, the Branches tab, the Collections tab and the Databases tab. The examples below will feature the Item Records Find Tool.

The General Tab



The General tab contains multiple search options.

- The **Object** box: defines what you are searching for, i.e., Item Records, Bib Records, Templates, Record Sets, etc.
- The **By** box: defines how you are searching for these objects, i.e., by Call Number, by Barcode, by Circulation Status, etc.
- The **Type** box: determines what type of search you are conducting.
    - ***Exact match (implicitly truncated)*** - Displays all the records beginning with the letters or numbers in the **For** field. No asterisk is needed in this type of search.
    - ***Exact match (explicitly truncated)*** - Displays only the records that exactly match the letters or numbers in the **For** field. If you use an asterisk, the results list displays the same records as those of an implicitly truncated search.
    - ***Browse*** - Display the specified index headings, beginning with entries that start with text similar to the text in the **For** field. For example, a browse title search for “trains” will display the portion of the title index containing the first title that starts with “trains.”
    - ***Keyword search*** - Finds bibliographic or item records that include the exact search term or terms you input, in any order. There is an implied “and” between each word. For example, a keyword title search for “trains” displays a list of items that have the word “trains” anywhere in the title.
    - ***Phrase search*** - A special kind of keyword search for multiple words in the exact order in which you entered them.
- The **For** field: where you type in the specific text you are searching for. You will specify the search string in the field by typing one or more characters. Polaris ignores letter case, multiple spaces, and all punctuation (except quotation marks) entered in the field. The following are searching considerations when deciding what text to type in the field.
    - *Stop words* - These are words that Polaris ignores when indexing and searching. Single characters (such as I and a), common two and three character words, articles, and prepositions are typically removed from queries to maximize searching performance. The default English stop words typically include: a, an, and, for, from, in, of, on, the, to, and with.
    - *Wildcard characters* - You can enter a partial word and a wildcard character to find materials that contain the partial word you entered. The wildcard characters, asterisk ***** or question mark **?**, represent the rest of the word.

    - *Search Results* - When a search is completed, the results list appears at the bottom of the Find Tool. Search results are displayed as a list of headings for browse searches and as a list of records for all other search types. Press **Ctrl Shift A** on your keyboard to automatically retrieve all records. When all the records have been transferred from the database, the status panel displays “Done.”
- The **Limit by** option allows you to limit your search to specific inquiries. You can limit by what the current circulation status is, in, out, in-transit, etc. You can search notes, blocks, donors, current borrower, etc. Depending on the **Limit by** option you select, and the **Object** you have selected to search, a drop down menu next to the **Value** box may offer specific options to limit your search to.
    - The **Value** box will either display a drop down menu for you to make a selection from or it will be blank and enable you to insert text to search for. It is important that you remember that truncation does NOT work in this **Value** box. In other words, typing in Mac to limit an Author search will only retrieve items that have Mac as an author; it will not retrieve any variation of Mac like MacDonald.

The General tab also features three different kinds of **Search Modes**.
- *Normal* - conducts a regular search using common language, used 95% of the time
- *Power* - conducts complex, precise searches by writing Common Command Language (CCL) queries. You must know this CCL language when using this type pf search.
- *SQL* **-** is a way to search the Polaris database and retrieve information you may not be able to get any other way. SQL uses tables and files within those tables to extract information from Polaris.

There is also an **Output** section on the General tab.
- This section allows you to choose **Count Only**. Count Only display a count of records retrieved. These records are NOT displayed. This count is located at the bottom right of the Find Tool. To display the records, remove the checkmark from the **Count Only** box and search again.

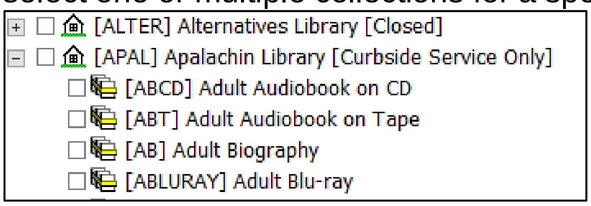
The buttons located on the right side are:
- *Search* – press to initiate your search.
- *Stop* – stops the search in progress.
- *New Search* – Clears the Find Tool of any search options you have selected and displays a blank Find Tool.
- *Clear* – clears any and all text from the **For** field only.
- *Help* – opens up the Polaris help documentation specific to the window you are currently in.

The Settings Tab
- The **Options** tab allows you to set up a record set prior to conducting your search and the results from that search are inserted into said record set. When the box **Send Results to a New Record Set** is checked you must type in a name for the Record Set. The Owner should pre-fill in with your library branch. Be sure to follow the name convention established by FLLS which is Library Code, then description. *Ex. CAN New Books*
- The **Warning Size Threshold** box with a 1,000 default number in it simply displays a warning if your record set will contain more than 1,000 records. Increase this limit if you do not want to see that message.

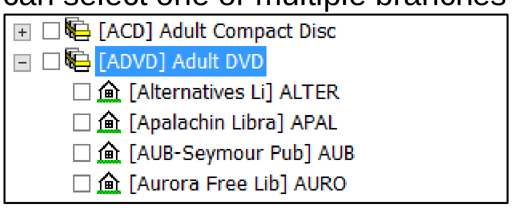
- The **Result Set Limit** and the **Sort Results** section allows you to increase the number of records retrieved and sorted from the default 1,000 records. Restore to defaults simply restores those limits to the 1,000 default number.

The Scoping Tab
Scoping is a method of further focusing your search beyond the basic search. Scoping, like power searching, allows you to conduct complex, precise searches through the Common Command Language. With scoping, you select the access points (qualifiers), Boolean operators, and search strings (values), and Polaris formats the information into Common Command Language. You can use scoping with exact match, keyword, and phrase searches for bibliographic and item records.

The Branches Tab
- The Branches tab allows you to limit your search to one or more specific branches or libraries. The **Unselect All** button removes the checkmark in front of all the libraries listed. Click on a box in front of any library you would like included in your search. The **Select All** button when checked inserts a checkmark in front of all the libraries listed. All libraries would be included in your search.
- You can also click on the **+** next to your branch and a list of collections will display. You can select one or multiple collections for a specific branch.



The Collections Tab
- The Collections tab allows you to limit your search to one or more specific collection codes. The **Unselect All** button removes the checkmark in front of all the collection codes listed. Click on a box in front of any collection code you would like included in your search. The **Select All** button when checked inserts a checkmark in front of all the collection codes listed. All collection codes would be included in your search.
- You can also click on the **+** next to a collection and a list of library branches will display. You can select one or multiple branches for a specific collection.



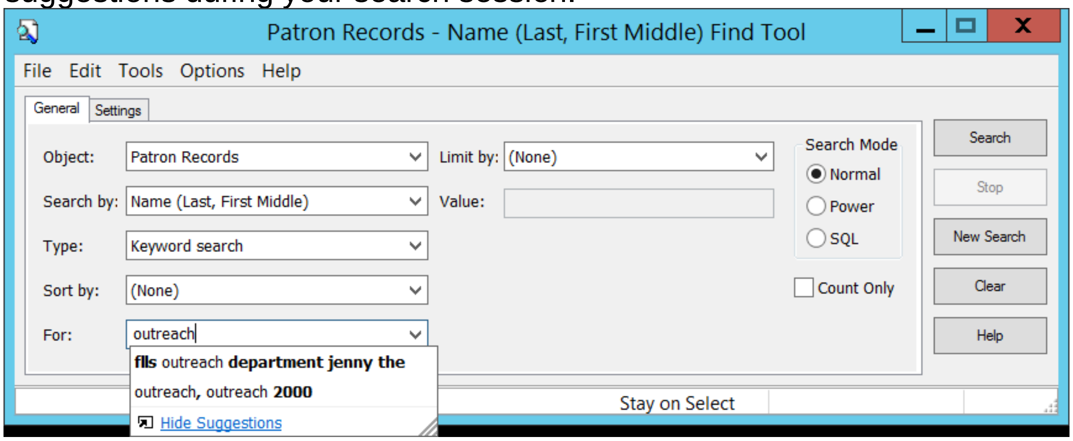
The Database Tab
Permissions are not set up for member libraries

Retrieving & Sorting Results
- If your search returns multiple records, to retrieve them all, use the keyboard command **Ctrl Shift A**. You will see the record count in the bottom right hand corner.
- If you feel your search query will return more than 1,000 items, select the **Setting** tab and increase your retrieval limit. If you see that your results stop exactly at 1,000 records this may be an indication you will need to increase your retrieval limit.
- If all you need is a count of items or patron, check the **Count Only** box on the **General** tab.

- After retrieving all records, you can sort your results by left clicking on any column header. Clicking once sorts in ascending order, (A-Z) left clicking again sorts in descending order (Z-A)

Auto Suggestions

- Search term suggestions may be displayed as you type your search term in the Find Tool **For** box when you select **Keyword search** or **Phrase search** in the **Type** box and search for patron records, item records, or BIB records by any of the following access points:
    - **Name (First Middle Last)**
    - **Name (Last, First Middle)**
    - **Address**
    - **Email address**
    - **Title**
    - **Author**
    - **Subject**
- You can click a suggestion to launch the search for the suggested term, or ignore the suggestions and continue to type your term. Click **Hide Suggestions** if you do not want to see suggestions during your search session.



Placing Holds

Whether a hold is a Bib level or Copy Specific (a.k.a. Item Specific) depends on how you search for the item. Unless a patron wants a specific volume or part, there is no need to place a copy specific hold. Copy specific holds hinder the system's ability to fill the request with the first available copy. The only way a copy specific hold can be satisfied is if that specific barcode is scanned at check-in.

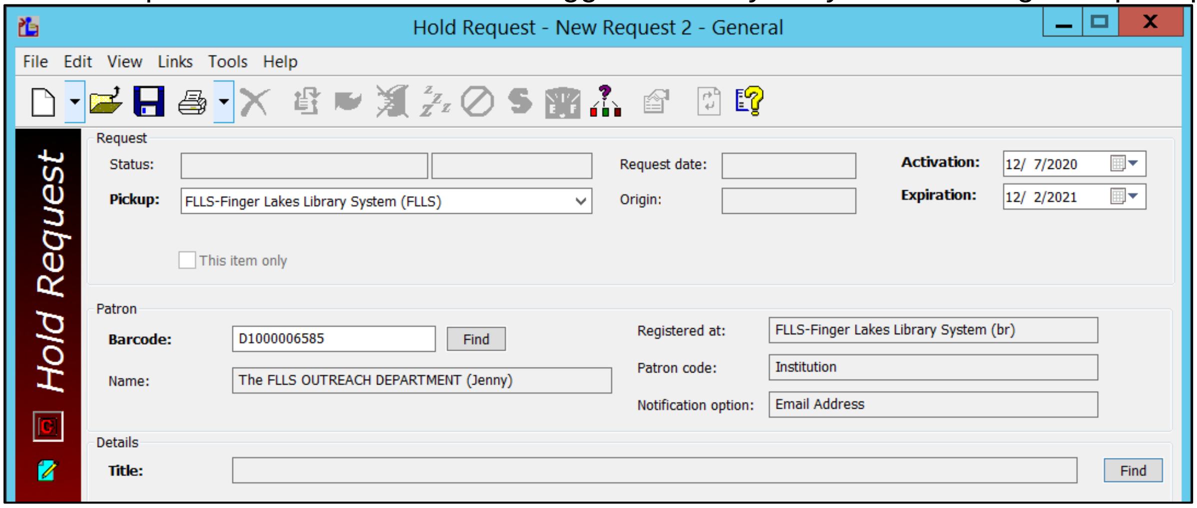
- From the Bib Record (this is a Bib level hold or "first available copy" hold), Search for a specific title using the **Find Tool**. Open up the Bib record and click on the **Place Hold** icon or from the **Tools** menu, select **Place Hold**.
- You can also place a hold on an item within your search results by right clicking on the bib record or item and then left clicking on **Place Hold…**
- Go to **Circulation → Patron Status** or **F6** and search for a patron. Click on the **Place Hold** icon or from the **Tools** menu, select **Place Hold**.

ALWAYS LOOK FOR THE HOLDS ICON → 

Placing Holds: Single Hold for One Patron

- Search for the patron using **Circulation → Patron Status** or **F6.** Open patron status. Click once on the **Place Hold** icon. The Hold Request work form will display.
- Click once on the **Find** button in the Bibliographic section to search for a title.

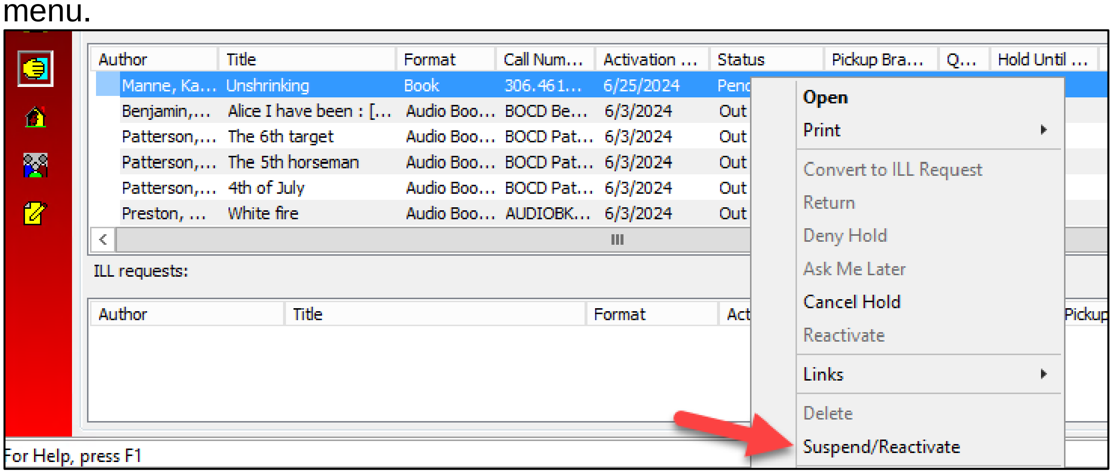
- If you want to limit your search to items owned by your library, you must click on the **Branches** tab to limit by Branch.
- The Pickup location will default to the logged in library but you can change the pickup location.



- If you come to the Hold Request work form through a Bib or item record, you will have to click on the Find button next to barcode to locate the patron instead.
- You can also change the Hold Activation date and the Hold Expiration date at this point.

Suspending Holds

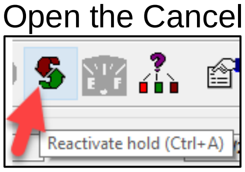
- If a patron needs to suspend their hold until a later date for any reason, you can use the Suspend/Reactivate feature.
- Search for the Patron by going to **Circulation → Patron Status** or **(F6)**. Select their Holds screen. Right click on the hold request and click on **Suspend/Reactivate** from the context menu.

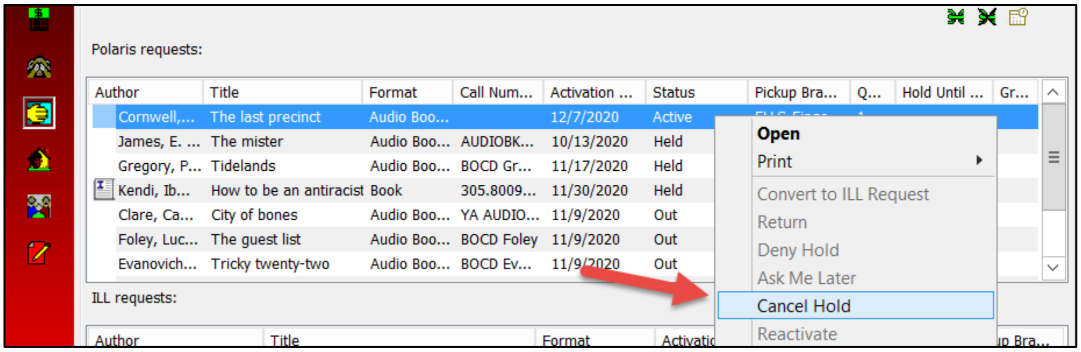


- Select a new activation date sometime in the future in the calendar that pops up and click **OK**.

Cancelling Holds

- Search for the Patron by going to **Circulation → Patron Status** or **(F6).** Select their Holds screen. Right click on the hold request and click on **Cancel Hold** from the context menu (See page 13). You can manually cancel requests that are active, inactive, pending, or not-supplied. Open the Cancelled Hold Request and click on the **Reactivate hold** button.



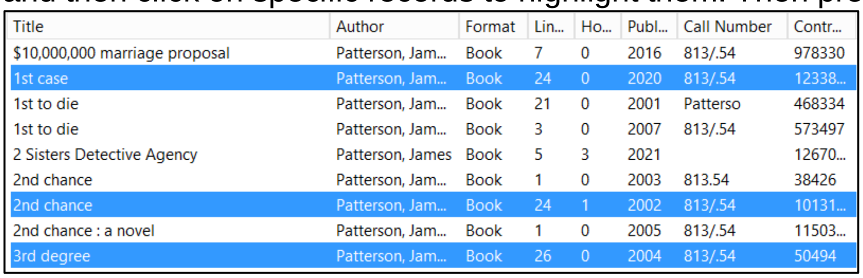


- Cancelled requests can be reactivated and will retain their original place in the Holds Queue.

Placing Multiple Holds

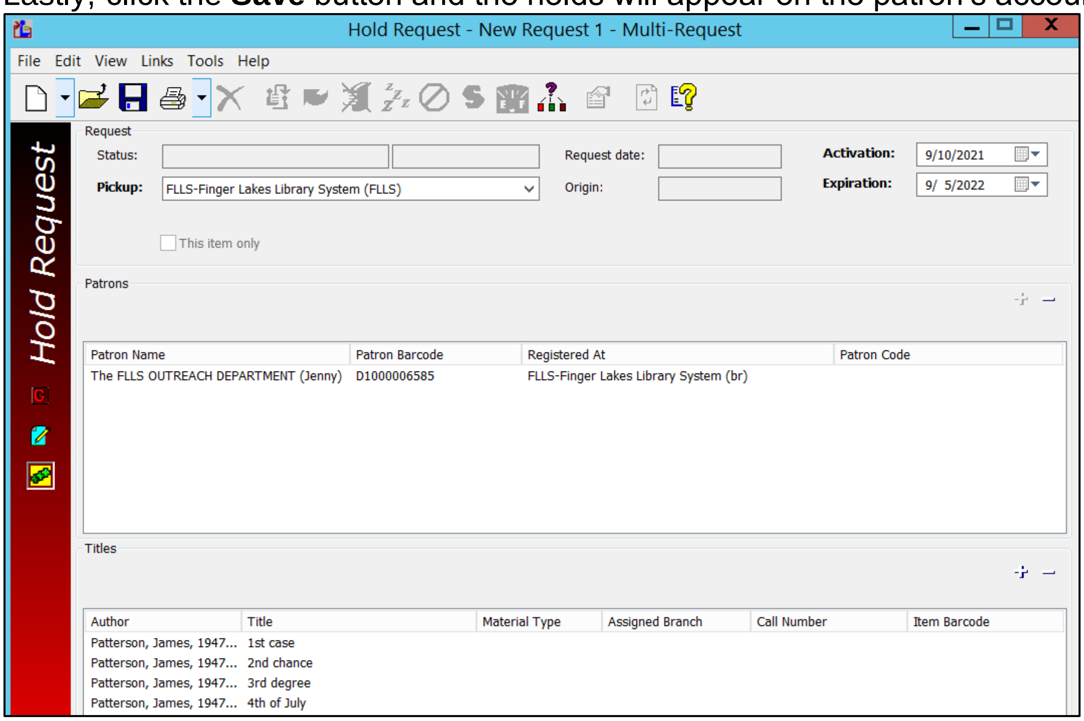
You can place multiple holds for the same patron by holding down the **Ctrl** key and selecting more than one record at a time followed by pressing the **Enter** key. For example, a patron wants to reserve several books by the same author or a specific subject.

- Using the Patron Status Find Tool, **Circulation** → **Patron Status** or **F6**, find the correct patron, and click on the **Place Hold** icon.
- Click on the **Find** button located next to the Title field in the Bibliographic section of the Hold Request work form.
- Using the Find Tool, search by Author, Subject, etc. Press the **Ctrl** button on your keyboard and then click on specific records to highlight them. Then press the **Enter** key.



Title	Author	Format	Lin...	Ho...	Publ...	Call Number	Contr...
$10,000,000 marriage proposal	Patterson, Jam...	Book	7	0	2016	813/.54	978330
1st case	Patterson, Jam...	Book	24	0	2020	813/.54	12338...
1st to die	Patterson, Jam...	Book	21	0	2001	Patterso	468334
1st to die	Patterson, Jam...	Book	3	0	2007	813/.54	573497
2 Sisters Detective Agency	Patterson, James	Book	5	3	2021		12670...
2nd chance	Patterson, Jam...	Book	1	0	2003	813.54	38426
2nd chance	Patterson, Jam...	Book	24	1	2002	813/.54	10131...
2nd chance : a novel	Patterson, Jam...	Book	1	0	2005	813/.54	11503...
3rd degree	Patterson, Jam...	Book	26	0	2004	813/.54	50494

- All selected records are now added to the Hold Request work form.
- Lastly, click the **Save** button and the holds will appear on the patron's account.



Hold Status Descriptions

Status	Explanation	Possible Staff Action
Active	The hold request has not yet been linked to an available item.	Monitor the request. Requests may have to be cancelled. The expiration date may need to be changed due to popularity of the item and longer wait times.
Cancelled	Hold requests that have been cancelled by the patron or a staff person.	These requests can be reactivated, if needed.
Expired	Hold requests that have expired.	These requests can be reactivated, if needed.
Held	The item should be on your holds shelf.	Monitor the item to make sure it does not remain on the shelf past the unclaimed date.
Inactive	The hold has an activation date that is after today's date.	Items will automatically move to active status upon the activation date.
Not Supplied	The item could not be supplied.	No items are available for the hold request. May be due to an item specific hold. Check the bib record to find other available items.
Pending	Hold requests that have been linked to an available item.	Monitor for anomalies.
Shipped	Items that have been shipped to fill a patron's hold request.	Notify FLLS or the sending library if the item hasn't arrived within 2 weeks. Keep in mind that delivery is still limited.
Unclaimed	Items that have not been picked up.	Check the holds shelf for the item and check it in to return to the sending library or to fill another hold request.

***Questions? Comments?* Contact:**

Computer Network Services Department
Finger Lakes Library System
1300 Dryden Road, Ithaca, NY 14850
(607) 273-4074 x237 **or** efranks@flls.org