

Polaris Leap Item Maintenance

Item Maintenance Best Practices

Attaching Your Item Record to a Pre-Existing Quick Bib

After receiving a new book, check Polaris to see if a Bib record already exists. Scan the ISBN into the Scan or search field at the top of the screen or click on **FIND** to open the Find Tool. Always search by ISBN or UPC and make sure to scan the ISBN or UPC to ensure accuracy.

If a Quick Bib or final bibliographic record already exists you should attach your item record to it, as long as the 020 or 024 matches. Under publication date, |||| will be present on Quick Bibs. This indicates that the record is a Quick Bib that was created by another library. The records displayed below are obviously Quick Bibs, identified by the |||| symbol in the Publication date column. If the record is a final bibliographic record, a 4-digit year will be present.

Backpack Explorer: Bird Watch	Storey Publishing	Book	0	0		1397617
W samym sercu morza	Moyes, Jojo, 196...	Book	1	1		1399362
Victory over the darkness : realizing the power of y...	Anderson, Neil T.,...	Book	1	1		1378947
Studies in the short story	Jaffe, Adrian H., c...	Book	1	1		1378804

Double click on the line item to bring up the bibliographic record. You may add an item record to the Quick Bib (or permanent bibliographic record) by following steps 9-15 below.

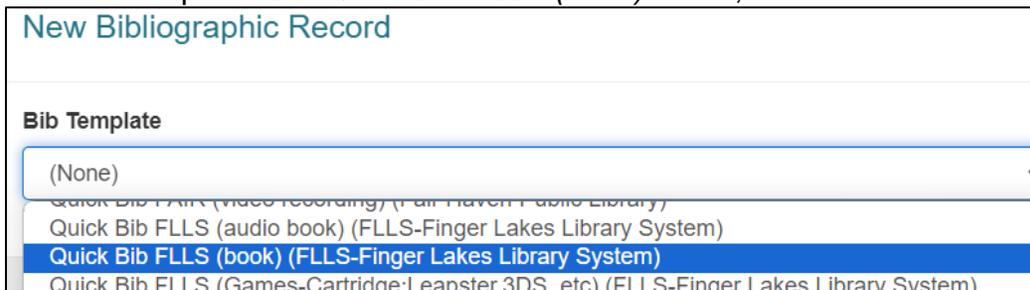
Creating a Quick Bib

This is assuming you have completed a search for the correct record and were unable to find one. These instructions apply to entering books, other items may have special procedures. ***STOP: Item Maintenance should be performed on a desktop computer or laptop, not a tablet or mobile device.***

1. Go to **New → Bibliographic Record**.



2. Select a template. Ex. *Quick Bib FLLS (book)*. Then, click **OK**.



3. When the New Bibliographic Record workform displays, move to the to the MARC section (you may have to scroll down). **Note:** *You can only edit 1 line at a time*. Check the box next to the

desired line and click **EDIT TAG**. Scan the ISBN into the 020 field. If no ISBN number is listed, type “none” (without quotation marks) in the field.

020 - INTERNATIONAL STANDARD BOOK NUMBER

Tag: 020

Data: ‡a9780785843054

Indicator One: - Undefined

Indicator Two: - Undefined

CTRL+Q - Insert subfield delimiter (‡)

(‡a) International Standard Book Number / (‡c) Terms of availability / (‡q) Qualifying information / (‡z) Canceled/invalid ISBN / (‡6) Linkage / (‡8) Field link and sequence number

OK CANCEL

4. Check the box for the 024 field with the UPC code and click **EDIT TAG**, this field is required if no 020 is found. If no UPC code is listed, type “none” (without quotation marks) in the field. Please note that 020 and 024 fields can match, in that case either scan the number twice or type “none” in 024. **STOP:** You cannot create a Quick Bib with “none” in both the 020 and 024 fields!
5. Follow the same procedure for the 100 field. Enter the Author’s Name: Last Name, First Name
6. Follow the same procedure for the 245 field. Enter the Title information. **STOP:** Don’t include any initial articles that may be in the title, such as A, An, or The. Don’t delete the indicators or delimiters in any field.
7. Click **SAVE** when done.
8. The **Check Headings Assistant** may alert you to BIB headings with no exact authority matches (i.e., author). Click on **Continue**. **STOP:** If the **Replace/Check for Duplicates** block opens, then you’ve created a Quick Bib for a title that was already in the catalog. Please click **Cancel**, then exit and don’t save the record.

Check Headings Assistant

The bibliographic headings with no exact authority matches are listed below.

HEADING	SOLUTION
100 1 ‡aSutherland, Julie	Leave heading unlinked

CONTINUE CANCEL

9. The saved bibliographic record will display. Click on **ACTIONS** and then **Create Item**.

10. The New Item Record workform will display with limited options. Select the correct template by clicking on **(None)** and choosing from the drop down list. The template will overlay the item record. For more information on item records, see page 6.
11. The Prefix should already be filled in. Be sure to scan in the item barcode and then enter the Price, Class, Cutter, Stat Code, etc. If you are feeling unsure, pick a similar item from the shelf and view its item record. Please be consistent within your own library.
12. Click **CREATE ITEM**. The label will display.
13. After the item is saved, you may now select the appropriate hold request restrictions, if needed, by clicking the **Details** tab.
14. You may now add any necessary notes and blocks (ex. *"Please check for 9 discs"* for an audiobook) on the **Blocks and Notes** tab. Enter information into the **Free Text Block** field.
15. Click **SAVE**. Check in the item.

Quick Bib DOs & DON'Ts

- A Quick Bib requires an ISBN (MARC tag 020) and/or a UPC/EAN code (MARC tag 024). If no ISBN AND no UPC/EAN code available on the item, **DON'T CREATE** a Quick Bib. If by chance, only an ISBN or a UPC/EAN code is available, please enter "none" (without quotation marks) in one or the other remaining tag. For example:
 - 020 (ISBN) 1400060079
 - 024 (UPC/EAN) 9781400060078

 - 020 (ISBN) none
 - 024 (UPC/EAN) 9781400060078

 - 020 (ISBN) 1400060079
 - 024 (UPC/EAN) none

- **DON'T CREATE A QUICK BIB WITH:**
 - 020 (ISBN) none
 - 024 (UPC/EAN) none

- **DON'T** use the Quick Bib unless you have the ISBN and/or the UPC code available to put into the record. If these two numbers are not available, contact Deb Geier at FLLS: dgeier@flls.org.

- The ISBN can be either 10 or 13 digits in length. The 13 digit ISBNs begin with 978 or 979 (for example, 9780553803426) – NEVER enter the segmented numbers with hyphens. For example:
 - **YES:** 020 (ISBN) 1400060079
 - **NO:** 020 (ISBN) 1-4000-6007-9

- The UPC/EAN code may vary in length, usually 11-13 digits – **DON'T** enter spaces or hyphens. For example:
 - **YES:** 024 (UPC/EAN) 9781400060078

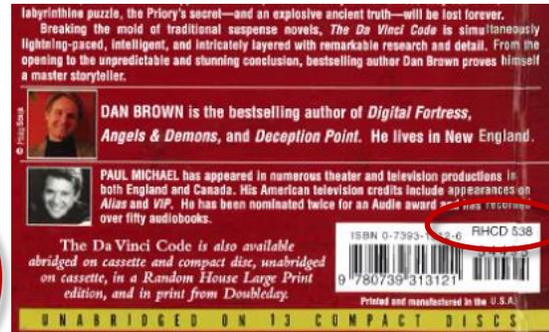


- **NO:** 024 (UPC/EAN) 97 8140006007 8
- When entering the UPC/EAN code, be sure to include ALL the numbers in the string. For example:
 - **YES:** 024 (UPC/EAN) 9781400060078
 - **NO:** 024 (UPC/EAN) 8140006007(missing the leading and trailing numbers)
- **DO** scan ISBNs, UPC codes, and barcodes. If there is an error, it makes it difficult for FLLS to replace the Quick Bib with a permanent Bib record. Scanning the ISBN/UPC eliminates errors. If your scanner doesn't scan ISBN's/UPC's correctly, contact Eric and he will help configure your scanner: efranks@flls.org.
- Paw Prints bindings, Turtleback Books, FolletBound, Penworthy, and other special bindings may have their own ISBNs merely because of the binding. When creating Quick Bibs, add BOTH the special binding ISBN (located on the back cover) as well as the book ISBN found within the book (located on the verso). The ISBN on the back of the book will be for the binding and the ISBN on the verso is for the content. Please include both in your Quick Bib:
 1. Open a new Quick Bib as per instructions.
 2. Click **INSERT** and then **Data Field**.
 3. In the **Tag** field, enter "020"
 4. In the **Data** field, click **CTRL Q** on your keyboard to add a subfield delimiter symbol.
 5. Type "a" and then scan the binding ISBN. Click **OK**.
 6. Check the box next to the other 020 field and click **EDIT TAG**. Type the ISBN from the verso page into the **Data** field. Click OK.
- **DON'T** scan the Item barcode into the ISBN tag of the Quick Bib. Barcodes are not searchable in OCLC and therefore are irrelevant in a Quick Bib.
- If there is another number other than an ISBN and/or a UPC/EAN code, **DON'T** enter the number. For example:
 - 020 (ISBN) 1400060079
 - 024 (UPC/EAN) 9781400060078
 - Extra number 52500 (**NO!**)
- **DON'T** enter the initial articles A, An, or The into the Quick Bib title – this causes the title to be displayed in a browse search under the initial article instead of the first significant word.
- **DO** enter the author last name first. Enter in only one author name. If there is only an editor, enter the name. If there is no author or editor, enter "none" (without quotation marks). Video recordings do not require an author to be entered.
- Use only the Quick Bib template that matches the format (book, audio book, music, or video) of the item you want to add. There are no Quick Bib templates available for multimedia and electronic resources – if there is a demand for them, they will be created.
- Be sure to use the correct format. For example, do not use the AUDIO BOOK format for music – use MUSIC RECORDING.

- Filling out the 028 field (publisher number) is helpful for Music CDs, Audiobook CDs, and DVDs. Transcribe the number exactly as seen on the item, including letters, numbers, spaces and hyphens. For Audiobook CDs, the number is usually near the ISBN/barcode. An example is “RHCD 538” for a Random House audiobook. For music CDs, the publisher number is often found on the spine of the case and on the disc surface as well. An example is “UAE 34732” for a music CD published by United Audio Entertainment. An example for the DVD would be the “N6929” on the spine of the case and on the actual disc.



Music CD



Audiobook CD



DVD or Blu-Ray

- If you can't locate the publisher number, type "none" (without quotation marks) in the 028 field.
- If a DVD set has multiple publisher numbers (one on each disc and possibly the container) just enter one of the disc numbers into the 028 field and scan the UPC into the 024 field. That is satisfactory to the FLLS.
- Make sure to scan the correct UPC barcode. Various retail stores may place their own barcode sticker on a DVD case over the UPC barcode, you will want to scan the original UPC barcode underneath.
- The Quick Bib is not an integrated function of Polaris. **DO** notify FLLS of any issues you come across.
- If you get lost or don't know what's going on when creating a Quick Bib, click **CLOSE** and then **DISCARD CHANGES**.
- DON'T** try to enter other extraneous bibliographic information into the Quick Bib. It is unnecessary and will get overwritten by the final bibliographic record.
- DO** add your item to a Quick Bib or final bibliographic record – just make sure the ISBN and UPC numbers in the Bib match your item in hand.

- As you save your Quick Bib you will be prompted to accept the author entered via the **Check Headings Assistant** – just click on **Continue Saving**. You should not see any more prompts to continue, and you will see the “Record status” of “Final”. If you do receive another prompt after the initial one, please exit from the record you are creating, and start over.
- If a **Replace/Check for Duplicates** block pops up, click **CLOSE** and **Discard Changes!**
- Don’t hesitate to contact FLLS at any time!

Item Record Tips & Tricks

- **Patrons from this library and branch only & Patrons from this branch only** switch to **Preferred Borrowers** after a designated time via overnight processing. However, you must manually change the following parameters after your items are no longer considered “New”: **Collection Code, Material type, Loan period, Fine code, Renewals, and Preferred Borrowers**. So, it is a good idea to enter all new items into a record set each month. You can also do an Ad-hoc bulk change.
- *A note about restrictions:* The “Preferred borrowers” hold restriction allows items to be placed on Hold and move between the libraries within a county. “Patrons from this library and branch only” & “Patrons from this branch only” allow you to restrict that item so only patrons registered at your library can place a hold on that item. They can however request to pick it up at one of the other libraries in the system.
- Follow established county guidelines and agreements when determining loan periods and request parameters. Visit www.flls.org/delivery-interlibrary-loan/ and click on **Member Library Lending Policies** to view current policies.
- If you have trouble locating a call number for a nonfiction item, use the search tool at www.librarything.com/mds/ to locate one. You can also search WorldCat at <https://search.worldcat.org/> or contact FLLS for assistance.

Other Special Procedures

Standards for Inserting Information in the Volume Field of a Multi-Part Set

The following examples will help to define and clarify the standardizations that should be used when entering information in the volume field of a multi-part set. A multi-part set is defined as any item that includes multiple parts and is packaged as such. The number of discs in each case determines what information goes in the volume field. See below for examples regarding a 4-part set:

- If these four discs are packaged all together in one case the volume field should contain the following information:
d. 1-4
- If these four discs are packaged in two cases the volume fields should contain the following information:
d. 1-2
d. 3-4

- If these four discs are packaged separately in individual cases the volume fields should contain the following information:
 - d. 1
 - d. 2
 - d. 3
 - d. 4

STOP: Please note there is a space between the period and the first number. If the space is left out or additional spaces are added it won't match during the holds processing.

Please follow the above standardized format for all multi-set items. Please do not enter disc information into the volume field for Audiobook on CDs unless the set has been split. If you receive any item that doesn't fit this standard, please contact Deb: dgeier@fls.org.

Volume Numbers for Books

Including v. 1 (or any other number) in a book item record is acceptable if a book is part of a set. Sometimes you may want to include a year in the volume field for a specific book, but it all depends on the bib record. If the bib record is only for the one volume, we suggest that you move the year to the suffix field. If several volumes from different years are on the same bib record, the year is the only thing that distinguishes each item. It would be acceptable to put the year in the volume field in this case.

Periodical Volume Number Procedure

Please pay close attention to the procedures for entering dates on your Polaris periodical [magazine] item records. There are two very important points to make:

- 1) Entering date data in the **Volume** field of the item link has to be performed for every periodical.
- 2) You can continue to add dates in the **Call number** field of the item link, but the current procedure requires entering specifically formulated dates in the **Volume** field.

Correct:

Title	Collection	Material Type	Call Number	Volume	Status
People	Adult P	zine	APER 2015 May 25	2015-05-25	
People	Adult P	zine	APER 2015 Jun 01	2015-06-01	
People	Adult P	zine	APER 2015 Jun 08	2015-06-08	
People	Adult P	zine	APER 2015 Jun 15	2015-06-15	
People	Adult Periodical (APER)	Magazine	APER 2015 Jun 22	2015-06-22	In

Date as entered in the Call Number field. (points to 'APER 2015 Jun 22')

Date as entered in the Volume field. (points to '2015-06-22')

Incorrect (see circled item):

Title	Collection	Material Type	Call Number	Volume	Status
People	Adult Periodical (APER)	Magazine	PER	2016/02/08	In
People	Adult Periodical (APER)	Magazine	PER	2016-02-15	Out
People	Adult Periodical (APER)	Magazine	PER	2016-01-25	Out
People	Adult Periodical (APER)	Magazine	PER	2016-02-01	Out
People	Adult Periodical (APER)	Magazine	PER	2016-01-18	Out

(Note: '2016/02/08' in the Volume field is circled in red in the original image.)

Here are some helpful hints on how to transcribe a date from the periodical to the Volume field of the item record:

- Dates to be entered into the Volume field should be derived from the title page of the periodical. Do not use cover or spine dates, if possible.
- Enter year first month second specific date third
2011 05 30
- It is critical that you do not forget to insert hyphens between sections of the transcribed date. **DO NOT** use slashes (\ or /), or blanks, see below:

Correct: 2011-05-30

Incorrect: 2011/05/30 or 2011 05 30

In the left-hand column below there are examples of publication dates found on a title page. The right-hand column is how they should be transcribed into the Volume field. **Note:** *This is not a comprehensive listing of all possible dates that might be encountered. When in doubt, ask for help.*

May 23, 2011	2011-05-23
June 6, 2011	2011-06-06
Apr. 11, 2011 - Apr. 17, 2011	2011-04-11 (<i>2nd date not entered</i>)
Apr. 18, 2011 - Apr. 24, 2011	2011-04-18
May 2011	2011-05
June 2011	2011-06
July/Aug 2011	2011-07 (<i>Aug left off</i>)
Sept/Oct 2011	2011-09 (<i>Oct left off</i>)
Spring 2011	2011-Spring
Summer 2011	2011-Summer
WINTER 10-11	2010-Winter (<i>2nd year not entered</i>)
SUMMER 11-12	2011-Summer
2011 Supplement 1	2011-Supp 1
2009 Special issue	2009-Spec

If you receive any item that doesn't fit this standard, please contact Deb: dgeier@flls.org.

DVD and Blu-Ray Combo Packs

If you are entering a Blu-Ray/DVD combo pack, please indicate this on your quick Bib by putting Blu-Ray and DVD after the title (245 tag) ex. *Pirates of the Caribbean (Blu-Ray and DVD)*.

If you split your items, make Blu-Ray d. 1 and the DVD d. 2. In the **prefix** if it is a Blu-Ray use "Blu-Ray" or if it is a DVD use "DVD." See items attached to Bib Record 1054033 for some examples.

If you are keeping them as a combo, the call number prefix would be "Blu-Ray + DVD." See item A20518614329 as an example. In any case, the item will always be classified as a Videodisc in the material type, loan period, and fine code. Remember to select the correct Collection: ABLURAY or ADVVD. Select the collection based on where you are shelving them.

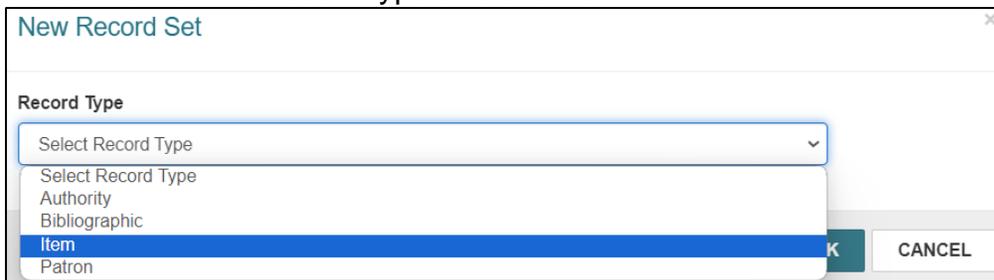
Processing Best Practices

The physical processing of the items in your library is also very important. Below are some best practices to remember when processing new items added to your collection.

- It is recommended that barcodes are placed on the front cover of your items. This will help facilitate self-checkout.
- Not sure where to place barcodes or where to place special library markings? Imitate what you find on books already in your collection.
- Many vendors will process your items for you. This includes covers and labels. Pockets are unnecessary.
- For assistance with **Label Manager**, please contact the CNS Department via phone (607) 273-4074 x237 or submit a Helpdesk Ticket: <https://flls.samanage.com/login>.
- You can also order item barcodes and labels through the Helpdesk.

Item Record Sets

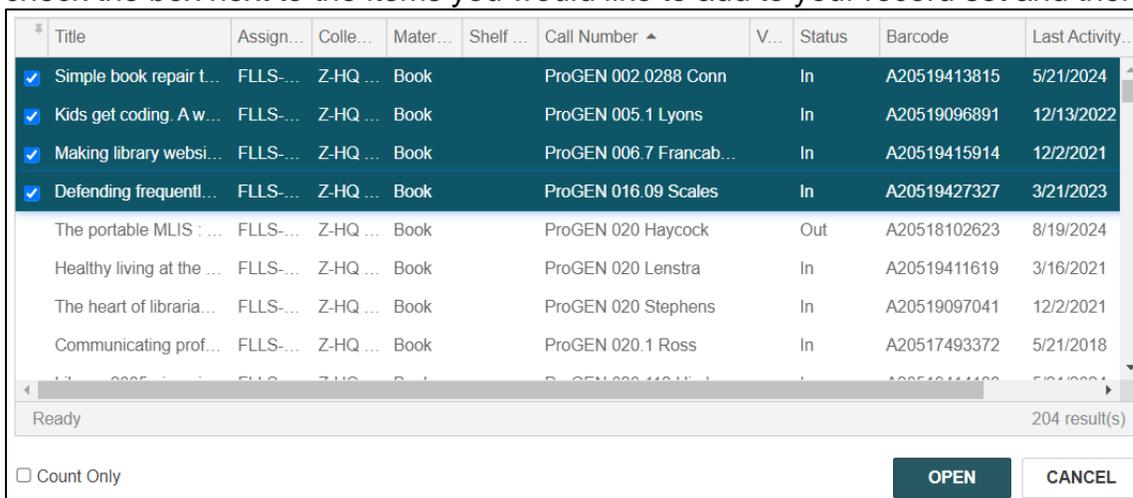
1. Click **New** and then **Record Set**.
2. Select **Item** as the record type and click **OK**.



3. Enter a **Name** to identify this record set. Follow the standard naming convention established by FLLS, ex. *CORT Lost & Missing Items*. Add your own notes to the **Note** field.
4. You may now add items to this record set by scanning their barcodes. Click in the field where it says, **Scan or enter barcode**, and start scanning.



5. You can also search for record by using the Find Tool. Perform your search. In the results, check the box next to the items you would like to add to your record set and then click **OPEN**.



Title	Assign...	Colle...	Mater...	Shelf ...	Call Number ^	V...	Status	Barcode	Last Activity...
<input checked="" type="checkbox"/> Simple book repair t...	FLLS-...	Z-HQ ...	Book		ProGEN 002.0288 Conn		In	A20519413815	5/21/2024
<input checked="" type="checkbox"/> Kids get coding. A w...	FLLS-...	Z-HQ ...	Book		ProGEN 005.1 Lyons		In	A20519096891	12/13/2022
<input checked="" type="checkbox"/> Making library websi...	FLLS-...	Z-HQ ...	Book		ProGEN 006.7 Francab...		In	A20519415914	12/2/2021
<input checked="" type="checkbox"/> Defending frequentl...	FLLS-...	Z-HQ ...	Book		ProGEN 016.09 Scales		In	A20519427327	3/21/2023
<input type="checkbox"/> The portable MLIS : ...	FLLS-...	Z-HQ ...	Book		ProGEN 020 Haycock		Out	A20518102623	8/19/2024
<input type="checkbox"/> Healthy living at the ...	FLLS-...	Z-HQ ...	Book		ProGEN 020 Lenstra		In	A20519411619	3/16/2021
<input type="checkbox"/> The heart of libraria...	FLLS-...	Z-HQ ...	Book		ProGEN 020 Stephens		In	A20519097041	12/2/2021
<input type="checkbox"/> Communicating prof...	FLLS-...	Z-HQ ...	Book		ProGEN 020.1 Ross		In	A20517493372	5/21/2018

6. Once you have added all the item records to the record set by scanning or searching, click **SAVE**.
7. To locate your Record set, click **FIND**. Click on *Patron* and select **Record Set** in the drop down menu. Search for your Record Set by name and double click to open.

Removing Items vs. Deleting Items

When selecting actions for record set items, please be cautious. Clicking the box next to 1 or more items and then clicking on **ACTIONS** (*next to the Filter Records field*) and **Remove Selected Records** will remove the items from the record set. Whereas, clicking on **ACTIONS** and then **Delete Selected Records** will delete the items from Polaris!

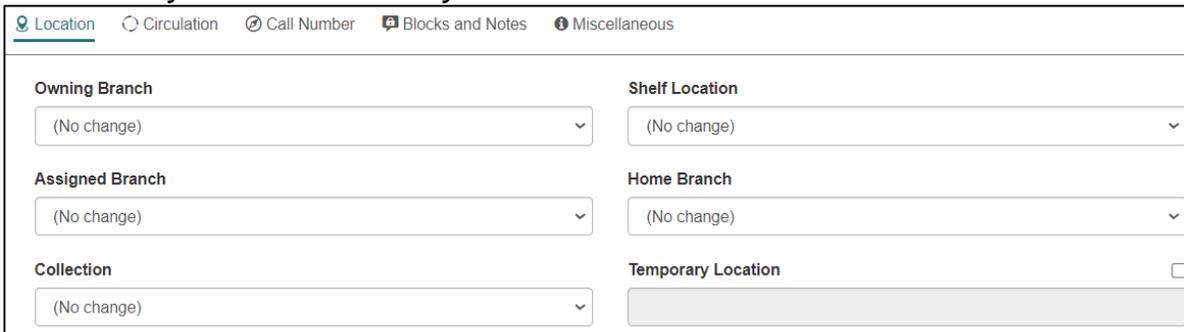
Bulk Change

Bulk change allows you change the parameters of groups of items at the same time, rather than changing each record individually. First, create the record set. You may now bulk change the items by clicking on **ACTIONS** (*next to SAVE*) and then **Bulk Change**. A new workform will appear with 5 available tabs, described below. If a field is greyed out, you will have to check the small box to the right of the parameter name to edit those selections.



Temporary Location

Location tab: Select your library in the **Assigned branch** drop down menu only if you need to alter any of these other features: collection, shelf location, or temporary location. **STOP: Never use *Owning Branch* instead of *Assigned Branch*! Please refrain from changing *Home Branch* as your item will only return to the library selected.**



Location Circulation Call Number Blocks and Notes Miscellaneous

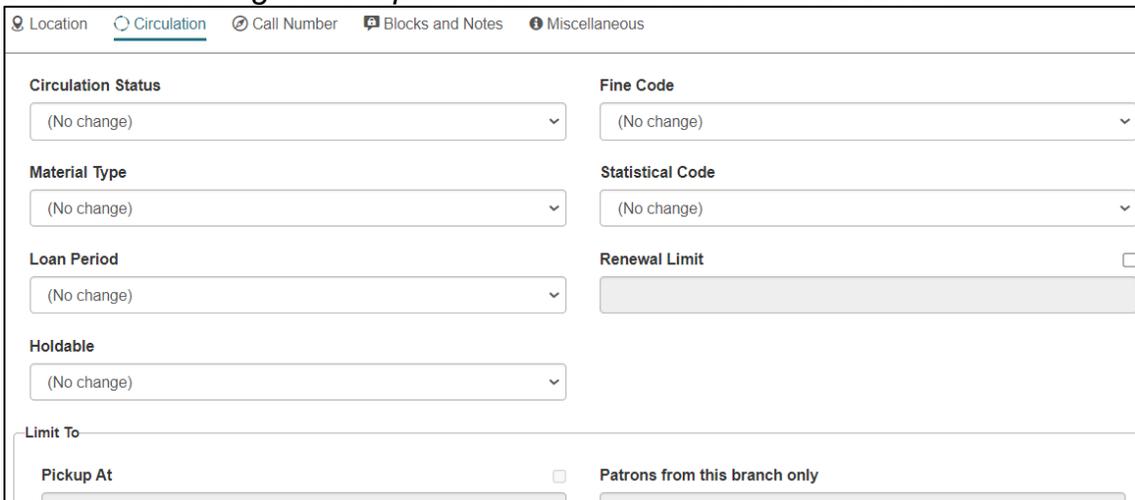
Owning Branch (No change) Shelf Location (No change)

Assigned Branch (No change) Home Branch (No change)

Collection (No change) Temporary Location

You can also create and save a Bulk Change template. After enter your desired parameters, click on **SAVE AS TEMPLATE** and enter a name in the window that pops up. The template will now appear in the **Template** drop down menu.

Circulation tab: Would allow you to change circulation information. **Note:** *Click in each box to activate the drop down menu for that parameter. If a field is greyed out, you will have to check the small box to the right of the parameter name to edit those selections.*



Location Circulation Call Number Blocks and Notes Miscellaneous

Circulation Status (No change) Fine Code (No change)

Material Type (No change) Statistical Code (No change)

Loan Period (No change) Renewal Limit

Holdable (No change)

Limit To

Pickup At Patrons from this branch only

Call Number tab: Would allow you to bulk change call numbers.

Location Circulation **Call Number** Blocks and Notes Miscellaneous

Call Number Scheme (No change) <input type="checkbox"/>	Suffix <input type="checkbox"/>
Prefix <input type="checkbox"/>	Volume <input type="checkbox"/>
Classification <input type="checkbox"/>	Copy <input type="checkbox"/>
Cutter <input type="checkbox"/>	Use call number fields from bib record <input type="checkbox"/>

Notes/Blocks tab: Allows you to add notes to a batch of records.

Location Circulation Call Number **Blocks and Notes** Miscellaneous

Library Assigned Block (No change) <input type="checkbox"/>	
Free Text Block <input type="checkbox"/>	Replace <input type="checkbox"/>
Public Note <input type="checkbox"/>	Replace <input type="checkbox"/>

Here are the steps to make a bulk change:

1. Create a new record set or locate a formerly created record set. To locate your Record set, click **FIND**. Click on *Patron* and select **Record Set** in the drop down menu. Search for your Record Set by name and double click to open.
2. Click on **ACTIONS** (*next to SAVE*) and then **Bulk Change**.
3. Select your desired parameters for each tab, click **UPDATE ITEMS**.
4. A **Summary of Changes** window will pop up. Click on **Continue**.
5. An *Item Bulk Change Report* PDF will download, including errors. Review as needed.
6. Click **CLOSE** to exit the record set when done.

Creating Record Sets from a Search Results Window

When using the Find Tool, create a Record Set with the search results at any time by checking the boxes next to specific items and then clicking on **ADD TO RECORD SET**. Select **New** or **Existing**.

Questions? Comments? Contact:



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