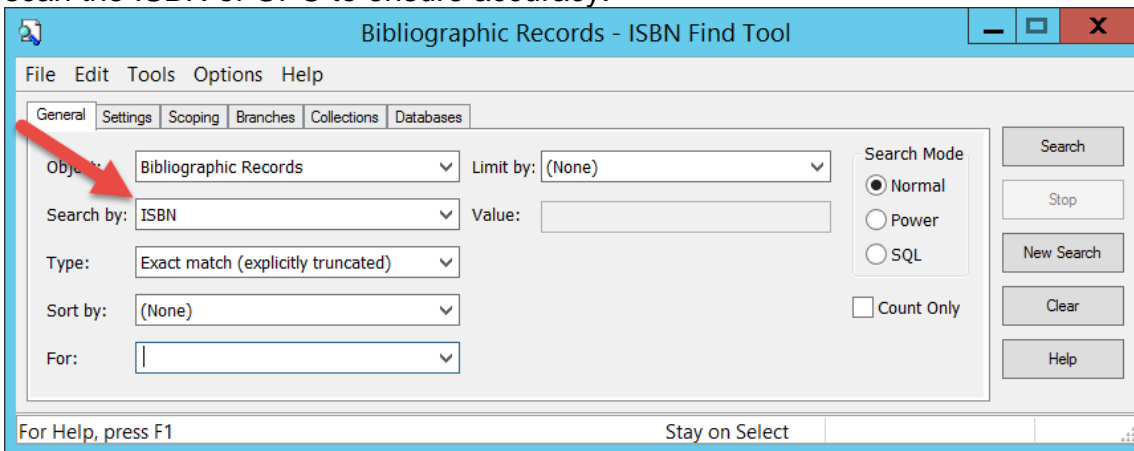


Item Maintenance Part 1: The Basics

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. Go to **Cataloging** → **Bibliographic Records** or **F12** to bring up the Find Tool. 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.

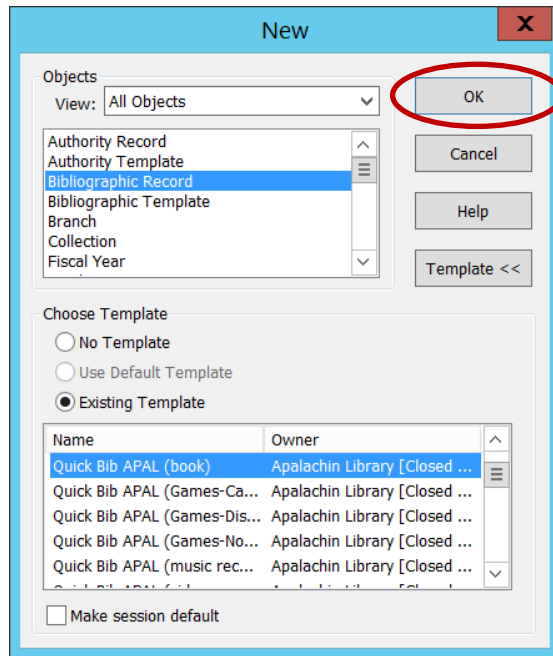
Title	Author	Format	Lin...	Ho...	Publ...	Call Number	Contr...
Speed 3: Grand Prix		Video ...	1	0		12457...	
Ivy + Bean no news is good news	Barrows, Annie	Book	1	1		12457...	
Gratitude and pasta	Schembra, Chris	Book	0	0		12457...	
Where's the Math? Books, games & routine...	Hynes-Berry, M...	Book	1	0		12457...	

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 9-13 below.

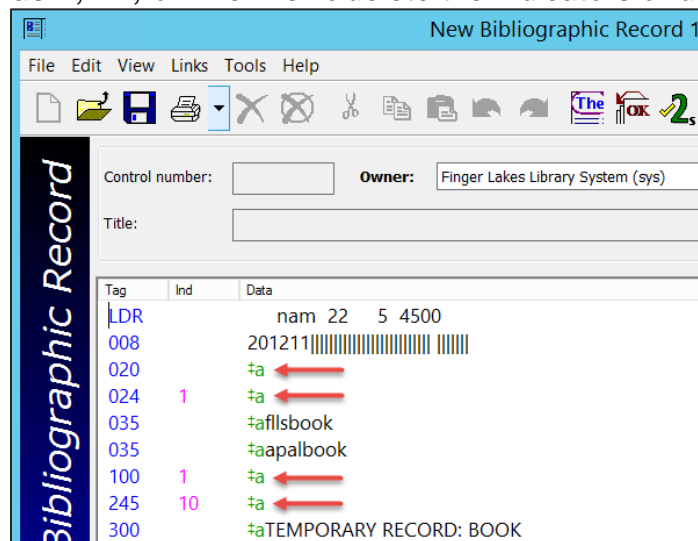
Creating a Quick Bib


This is assuming you have completed a search for the correct record and were unable to find one.

1. Go to **File** → **New** or click on the New button. 
2. Select **Bibliographic Record**, select **Existing Template** and select your library Quick Bib template depending on the format: Book, audio book, sound recording, or video. Ex. *Quick Bib CAN (book)*. Then, click **OK**.



3. When the Quick Bib window displays, scan the ISBN into the 020 field. If no ISBN number is listed, type “none” (without quotation marks) in the field.
4. Fill in the 024 field with the UPC code, 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. ***STOP:*** You cannot create a Quick Bib with “none” in both the 020 and 024 fields!
5. Fill in the 100 field with the Author’s Name: Last Name, First Name
6. Fill in the 245 field with 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 on the Save button  or go to **File → Save**.
8. The **Check Headings Assistant** may alert you to BIB headings with no exact authority matches (i.e., author). Click on **Continue Saving**. ***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.

9. Open the **Tools** menu and select **Create Item Records** or click on the appropriate icon.
10. The New Item Record Options work form will display.
11. Select the correct template by clicking on **(None)** and choosing from the drop down list. The item record will display. For more information on item records, see page 7.

12. The Prefix should already be filled in. Be sure to scan in the item barcode and then enter the Price, Class, Cutter, and Stat Code. Select the appropriate hold request restrictions, if necessary. Include notes and blocks (ex. "Please check for 9 discs" for an audiobook) on the **Notes and Notices** page. If you are feeling unsure, pick a similar item from the shelf and view its item record. Please be consistent within your own library.

13. Go to **File** → **Save** or click on the Save icon. 

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 just after the `±a` symbol and hit **Enter** on your keyboard. This creates a new line.

Tag	Ind	Data
LDR		nam 22 5 4500
008		190425
020		±a
024	1	±a
035		±afflsbook
035		±aweedbook
100	1	±a

3. Highlight the 020 field. Right click on the blue highlight and left click on **Copy**.

Tag	Ind	Data
LDR		nam 22 5 4500
008		190425
020		±a
024	1	±a
035		±afflsbook
035		±aweedbook
100	1	±a
245	10	

4. Click in the blank field. Right click and left click on **Paste**.

Tag	Ind	Data
LDR		nam 22 5 4500
008		190425
020		±a

5. You can now enter a second ISBN, if needed. Your record should now look like this:

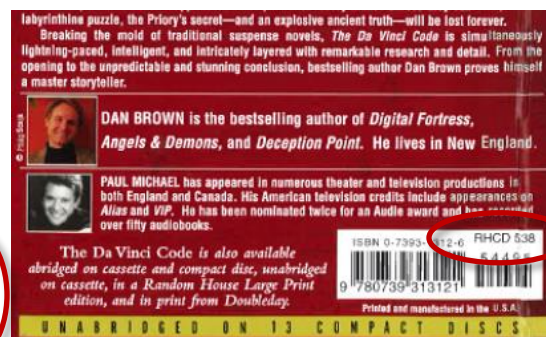
Tag	Ind	Data
LDR		nam 22 5 4500
008		190425
020		±a
020		±a
024	1	±a
035		±afflsbook
035		±aweedbook
100	1	±a

- **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 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 barcode. Various retail stores may place their own barcode sticker on a DVD case over the real barcode, you will want to scan the original 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, simply close out the function and respond to the prompt "You have made changes to this record. Do you want to save the changes?" by clicking on the **No** button.
- **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 file 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, exit and don't save the record.
- Don't hesitate to contact FLLS at any time!

Item Record Tips & Tricks

- Please use your item templates when adding item records to Quick Bibs. You may notice that the parameters are incorrect for your current process. To edit your existing templates: **Polaris Toolbar** → **Cataloging** → **Templates** → **Item** → search by your library code (ex. PORT) and select a template → update the parameters → **Save**.
- You can also create new item templates as needed: **Polaris Toolbar** → **File** → **New** → **Item Template** → set your desired parameters → **Save**.
- All **bold** fields of the item record are required and you cannot save without making a selection, but double check to make sure that you covered all the appropriate fields! Also, remember to include a Stat Code and price.
- **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@flls.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		Magazine	APER 2015 May 25	2015-05-25	
People		Magazine	APER 2015 Jun 01	2015-06-01	
People		Magazine	APER 2015 Jun 08	2015-06-08	
People		Magazine	APER 2015 Jun 15	2015-06-15	
People		Magazine	APER 2015 Jun 22	2015-06-22	

Date as entered in the Call Number field. → **Date as entered in the Volume field.**

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

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
May 30, 2011	2011-05-30
Apr. 11, 2011 - Apr. 17, 2011	2011-04-11 (2 nd date not entered)
Apr. 18, 2011 - Apr. 24, 2011	2011-04-18
June 2011	2011-06
July 2011	2011-07

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>)
SPRING 11-12	2011-Spring
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 ADVD. Select the collection based on where you are shelving them.

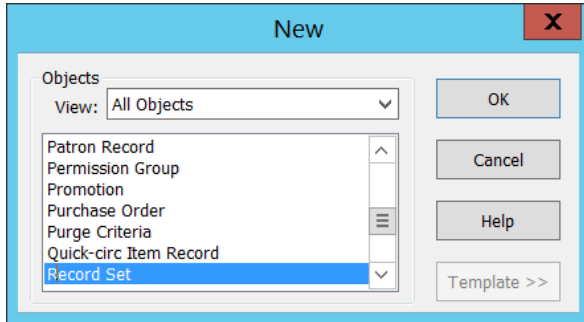
Processing Best Practices

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.

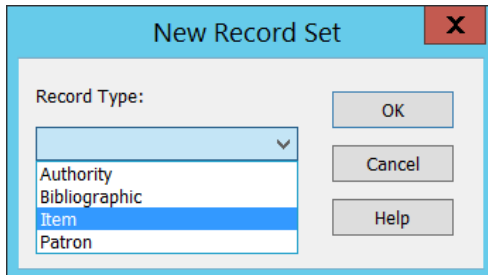
- It is recommended that barcodes are placed on the front cover of your items. This will help facilitate self-checkout.
- Not sure where to place barcodes or where to place special library markings? Imitate what you find on books already in your collection.
- Many vendors will process your items for 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 Help Desk. Go to <https://www.flls.org/> and click on **FLLS HELPDESK**. You may have to create an account. You can also report errors and request technology assistance from the CNS Department through the Helpdesk.

Item Record Sets

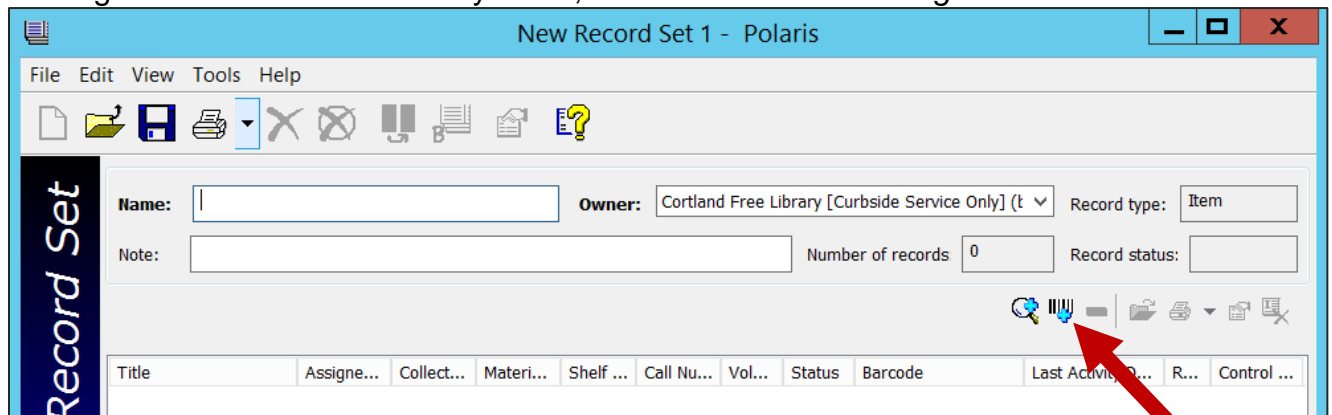
1. Go to **File** → **New** or click the New button. 
2. Select **Record Set** and click on **OK**.




3. Select **Item** and click **OK**.



4. Enter a **Name** to identify this record set and any **Notes** you wish to enter. Follow the standard naming convention established by FLLS, ex. *CORT Lost & Missing Items*.



5. You may now add items to this record set by scanning their barcodes. Click on the **Add by Scanning** button.
6. Or **Searching** for them using the Find Tool.  Remember to hit **Ctrl Shift A** to retrieve all results. Use **Ctrl A** to select all results or hold down **Ctrl** and click on specific records. Then hit **Enter** on the keyboard.
7. Once you have added all the item records to the record set, save the set by clicking on the **Save** icon.

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 the **Bulk Change** icon (see above). The Item Record Bulk Change window will pop up. There are six tabs including Location, Circulation, Call Number, Notes/Blocks, Misc., and Report/Record Set.

- **Location tab:** Click in the box next to **Assigned branch** and choose your library name only if you need to alter any of the features below it: assigned collection, shelf location, or temporary location. **STOP:** Never use **Owner** instead of **Assigned Branch!** Please refrain from changing **Home Branch** as your item will only return to the library selected.

The screenshot shows the 'Location' tab of a library system interface. It contains several checkboxes and dropdown menus. The 'Owner' checkbox is crossed out with a red X. A red arrow points to the 'Assigned branch' checkbox. Other options include 'Assigned collection', 'Shelf location', 'Home branch', and 'Temporary location', each with a corresponding dropdown menu.

- You can also create and save a Bulk Change template. After enter your desired parameters, click on **Save As** and enter a name. The template will now appear in the **Template** drop down menu.
- **Circulation tab:** Click in each box to activate the drop down menu next to each parameter. Select the correct setting.

The screenshot shows the 'Circulation' tab of a library system interface. It contains several checkboxes and dropdown menus. The 'Limit To' section is expanded, showing options for 'Pickup at', 'Patrons from this library and branches', 'Patrons from this branch only', and 'Preferred borrowers'. Other options include 'Circulation status', 'Material type', 'Loan period', 'Fine code', 'Statistical code', 'Renewal limit', and 'Holdable'.

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

The screenshot shows the 'Call Number' tab of a library system interface. The tab is selected, and the interface contains several form fields, each with a checkbox to its left:

- Shelving scheme: [dropdown menu]
- Call number prefix: [text input]
- Classification number: [text input]
- Cutter number: [text input]
- Call number suffix: [text input]
- Volume number: [text input]
- Copy number: [text input]
- Use call number fields from bib record

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

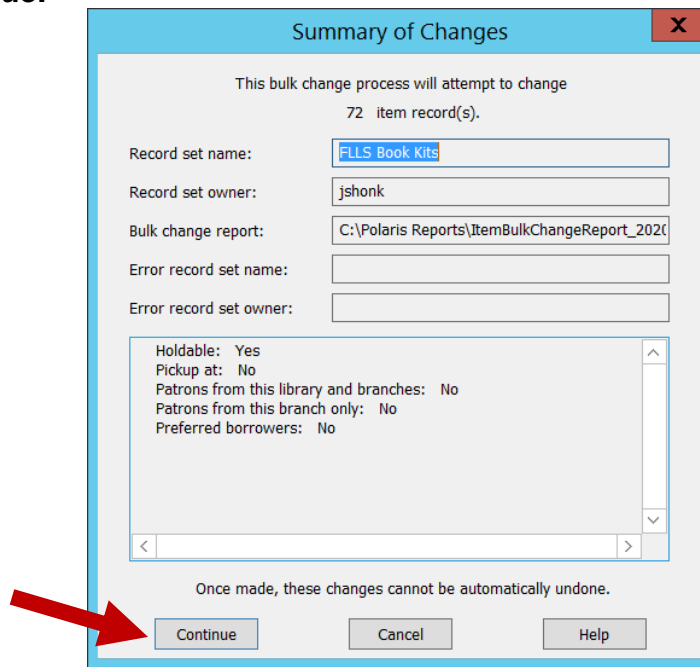
The screenshot shows the 'Notes/Blocks' tab of a library system interface. The tab is selected, and the interface contains several form fields, each with a checkbox to its left:

- Public note: [text input] with radio buttons for Replace, Prepend, and Append
- Non-public note: [text input] with radio buttons for Replace, Prepend, and Append
- Physical condition: [text input] with radio buttons for Replace, Prepend, and Append
- Library assigned block: [dropdown menu]
- Free text block: [text input] with radio buttons for Replace, Prepend, and Append

- **Misc tab:** Allows you to bulk add a price to all records.

- The **Report/Record Set** tab is set up to produce a report of any errors encountered during the bulk change. A default file name is entered for you and the file can be found in the folder entitled **Polaris Reports/Bulk Change Reports** on your desktop. You may need to choose a file by selecting **Browse** if an error is displayed.

- Once all your parameters are set up, select **OK**.
- Click on **Continue**.



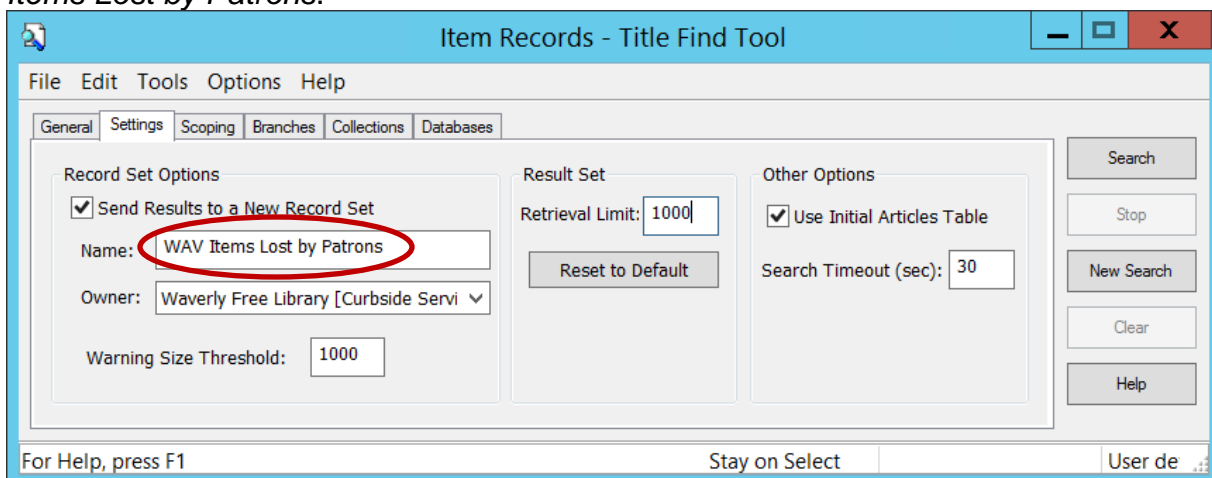
- A message will display telling you that the bulk processing is completed. Click on **OK** and check the error report if needed.

Creating Record Sets from a Search Results Window

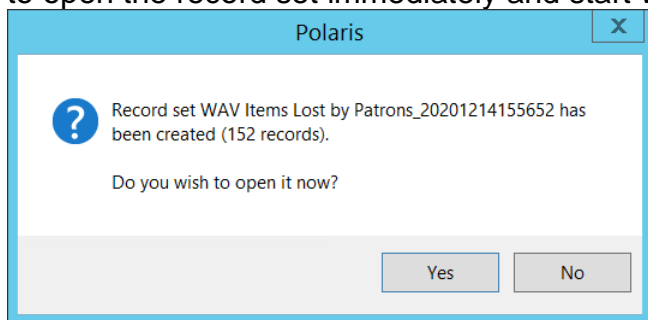
You can also create a record set prior to conducting a search and the results from that search will automatically populate the record set. For example, you could retrieve all items owned by your library that have a status of Missing so you can search for them.

Here are the steps you would take to add them to a record set

1. Bring up the Item Find Tool, **Cataloging** → **Item Records** or **Ctrl Alt F9**
2. The default *Title* or *Barcode* in the **By** box is acceptable.
3. Type * in the **For** box.
4. Select *Circulation Status* in the **Limit By** box and then select *Missing* in the **Value** box.
5. Select the **Branches** tab and limit to your branch.
6. Select the **Settings** tab and check the box for **Send Results to a New Record Set**.
7. Enter a name for this Record Set. Remember to follow FLLS naming conventions. *Ex. WAV Items Lost by Patrons.*



8. Increase the **Retrieval Limit** if you suspect your results may be more than the default 1000 records retrieved.
9. Select the **Search** button.
10. A box will display informing you that a record set has been created and the number of records in that record set. Notice a time stamp has been added to the end of the name. You can elect to open the record set immediately and start working on it or select **No** and search for it later.



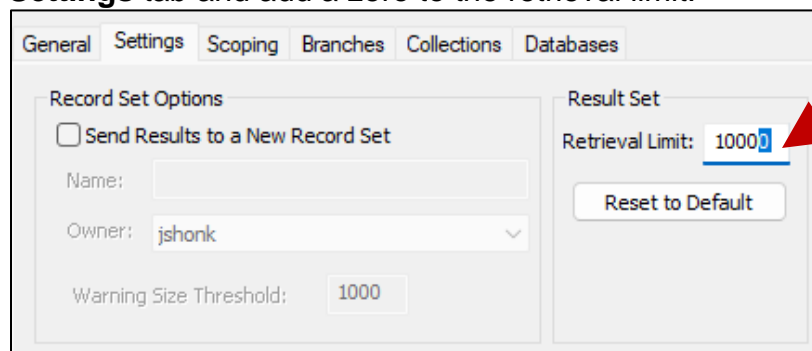
To search for this record set:

- Go to **Cataloging** → **Record Sets**.
- Type in the name of the record set and it will display on your screen.

Ad hoc Bulk Change

Perform a bulk change without requiring a record set.

1. Open the Item Record Find Tool.
2. Customize your search parameters so that you pull up your desired records. Remember to click on the **Branches** tab and click on the **Unselect All** button. Then, click on the checkbox next to your library so you only bring in items from your collection.
3. Click on the **Search** button. Once the search is complete look in the lower right corner of the window. You will see the number of records retrieved. Press the **Ctrl Shift A** buttons on your keyboard to retrieve all the results.
4. You may have to increase the Retrieval Limit if all your records are not displaying. You would see that the number of records is showing 1,000/3,000/5,000 or something similar. Click on the **Settings** tab and add a zero to the retrieval limit.



5. At this point you can perform an “Ad hoc Bulk Change” on your items. Select all the items by pressing the **Ctrl A** on your keyboard which will highlight all the items in the results section. You can also use **Ctrl** or **Ctrl Shift** to select specific items from the list. Right click on anywhere in the blue highlighted section and then left click on the **Ad hoc Bulk Change** from the menu.

Title	Assig...	Colle...	Mate...	Shelf...	Call ...	V...	Status	Barcode	Last Activi...	R...	Con...
The Finger Lakes	Popla...	Adult...	Book...		917.4...		In	A205156384	5/7/2019	Fi...	159...
The thankful book	UNS...	Child...	Book...		E Parr					Fi...	159...
Our very own Chri...	Weed...	Child...	Book...		E Lan...					Fi...	159...
Peterson's how to ...	Weed...	Adult...	Book...		378.3...					Fi...	160...
The lost Christmas...	Wave...	Child...	Book...		J 709...					Fi...	160...
Color him orange ...	UNS...	Adult...	Book...		796.3...					Fi...	160...
Walking seasonal ...	Popla...	Adult...	Book...		912.7...					Fi...	161...
Eye candy : craftin...	Mora...	Child...	Book...		J 641...					Fi...	161...
Thanksgiving orig...	Mora...	Child...	Book...		J 736...					Fi...	161...
Dutch renaissance...	Popla...	Adult...	Book...		974.7...					Fi...	161...
Piece of cake! : de...	Mora...	Child...	Book...		J 641...					Fi...	161...
Safeguarding wat...	Mora...	Child...	Book...		J 363...					Fi...	161...
Oneida history an...	Mora...	Child...	Book...		J 305...					Fi...	161...
One big table to ...	Popla...	Adult...	Book...		641.5...					Fi...	162...

6. The Item Record Bulk Change window that comes up should look familiar. Make your selections for the desired change and click **OK**. Follow the prompts to complete the Bulk Change.

Questions? Comments? Contact:



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