The Accidental Polaris System Administrator

Michelle Ralston

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Senior Library Training Consultant,
Innovative

Years of Experience: 19
Education: MLS, University of Illinois
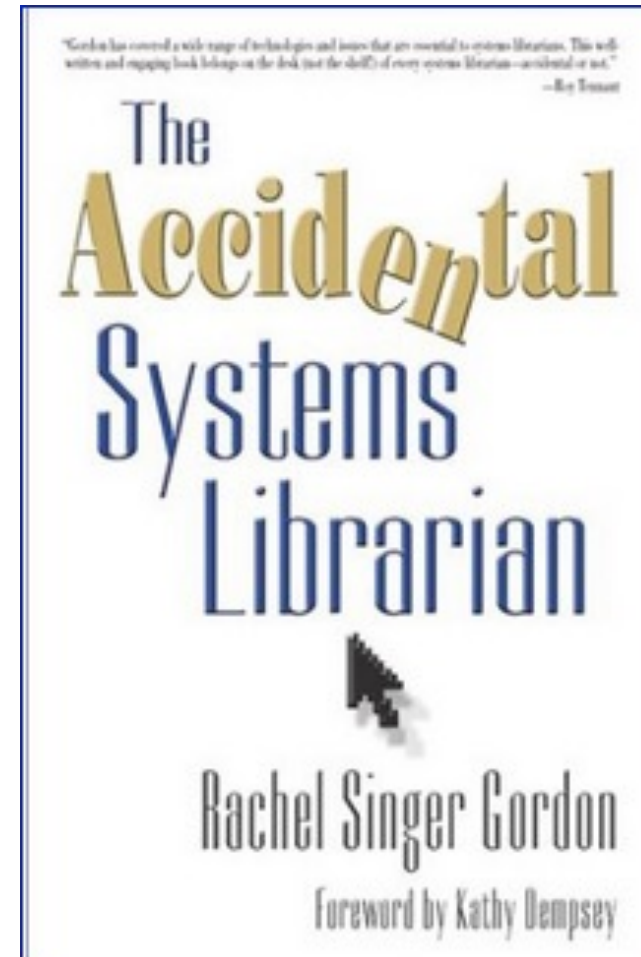
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The Accidental Systems Librarian

Rachel Singer Gordon

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edition/_/f77CwJ2g0GAC?hl=en&gbpv=0

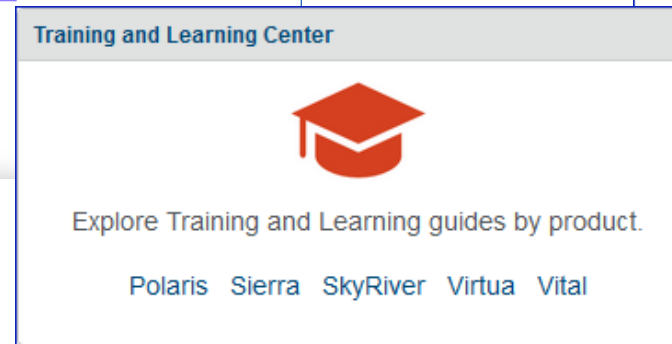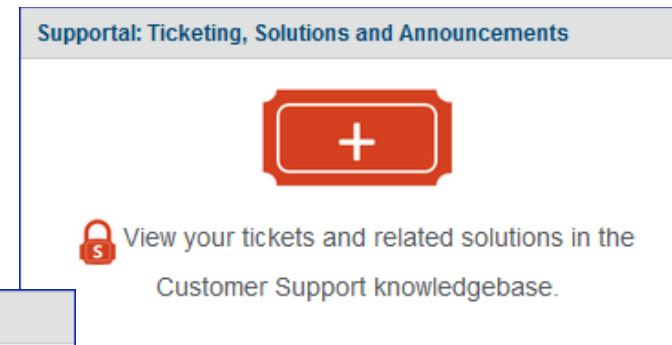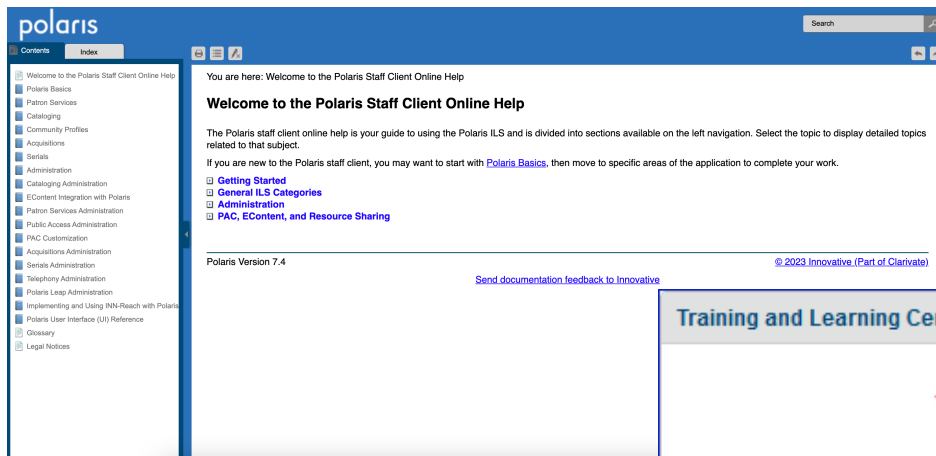# Administering the ILS

- Don't do it alone!

Administering the ILS

Know your resources!

User Manual: https://documentation.iii.com/polaris/7.4/ (Help | Manual)

STLC: https://support.iii.com (Training and Learning Center | Polaris)

Supportal: https://support.iii.com (Requires Supportal Login)
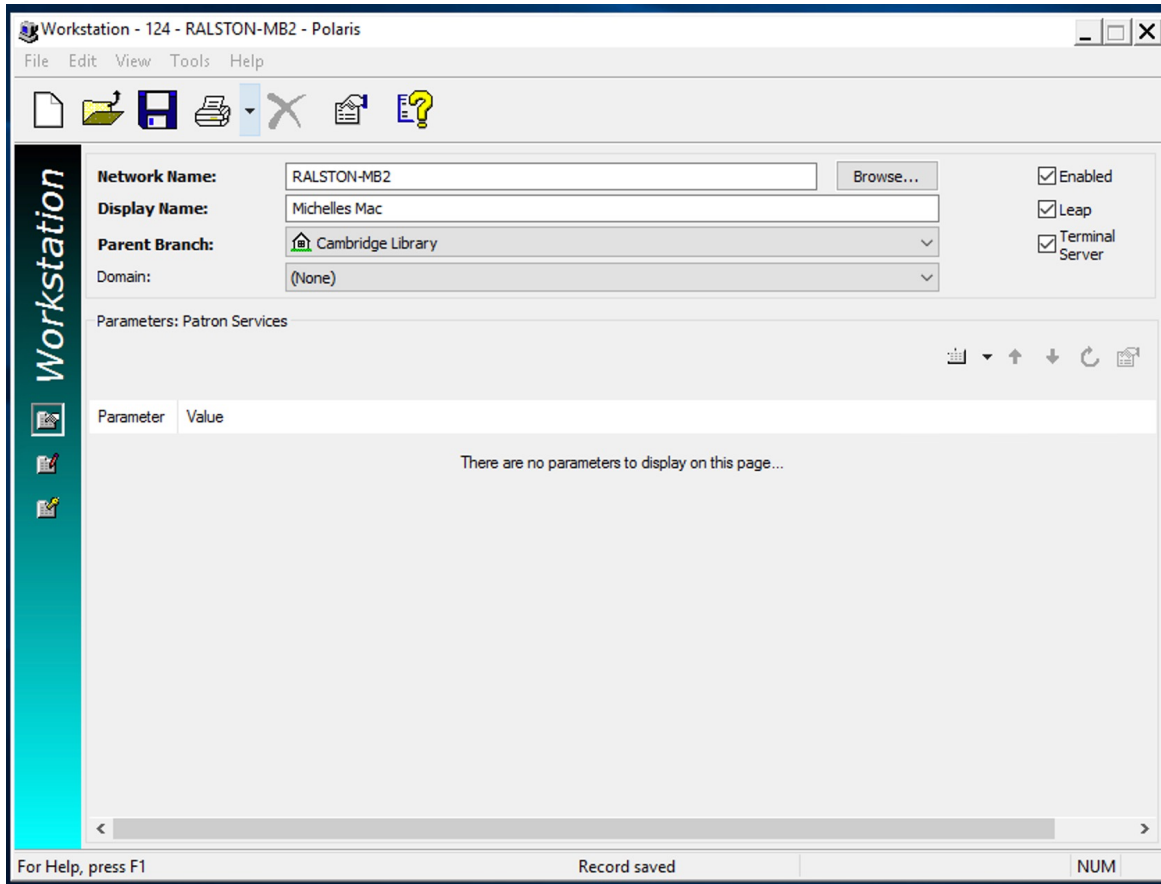
The Accidental Polaris System Administrator

- Workstations
- Staff members
- Permissions
- Parameters and Profiles
- SQL jobs

Workstations

- Replacing workstations throughout the year
- Run any reports that are workstation based
- Make inactive or delete unused workstations

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Staff Member Records

- Review staff changes throughout the year

- Run any reports that are staff member based
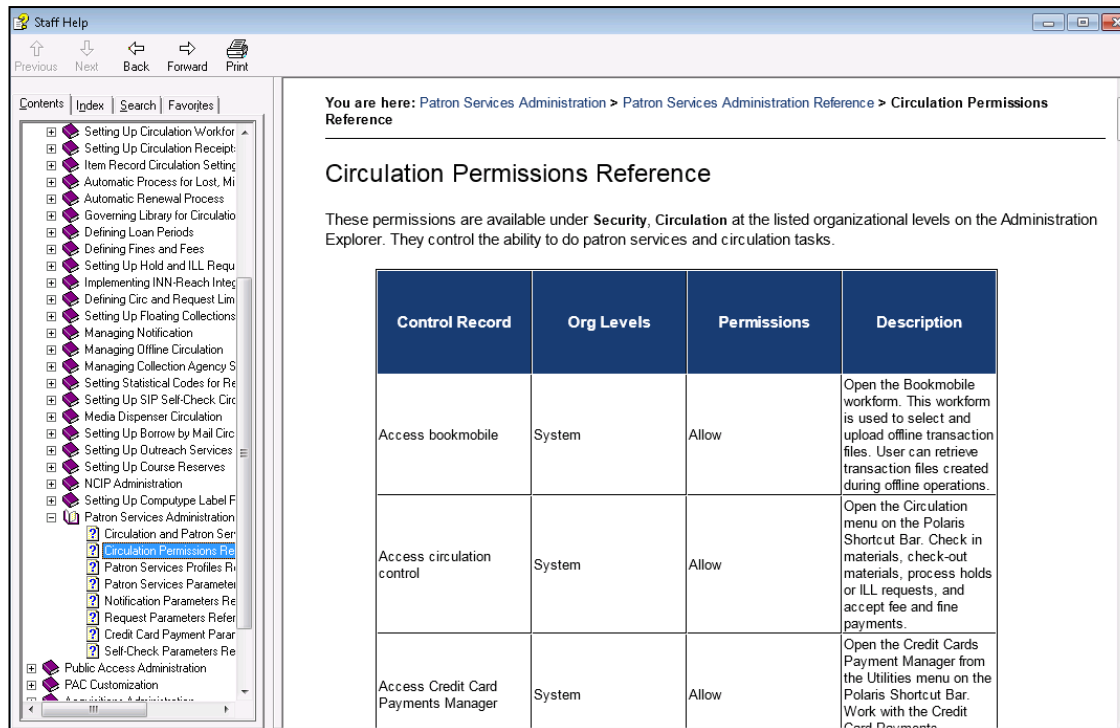
- Make suspend or delete staff records

Permissions

- Review Permissions
- Create new groups if needed
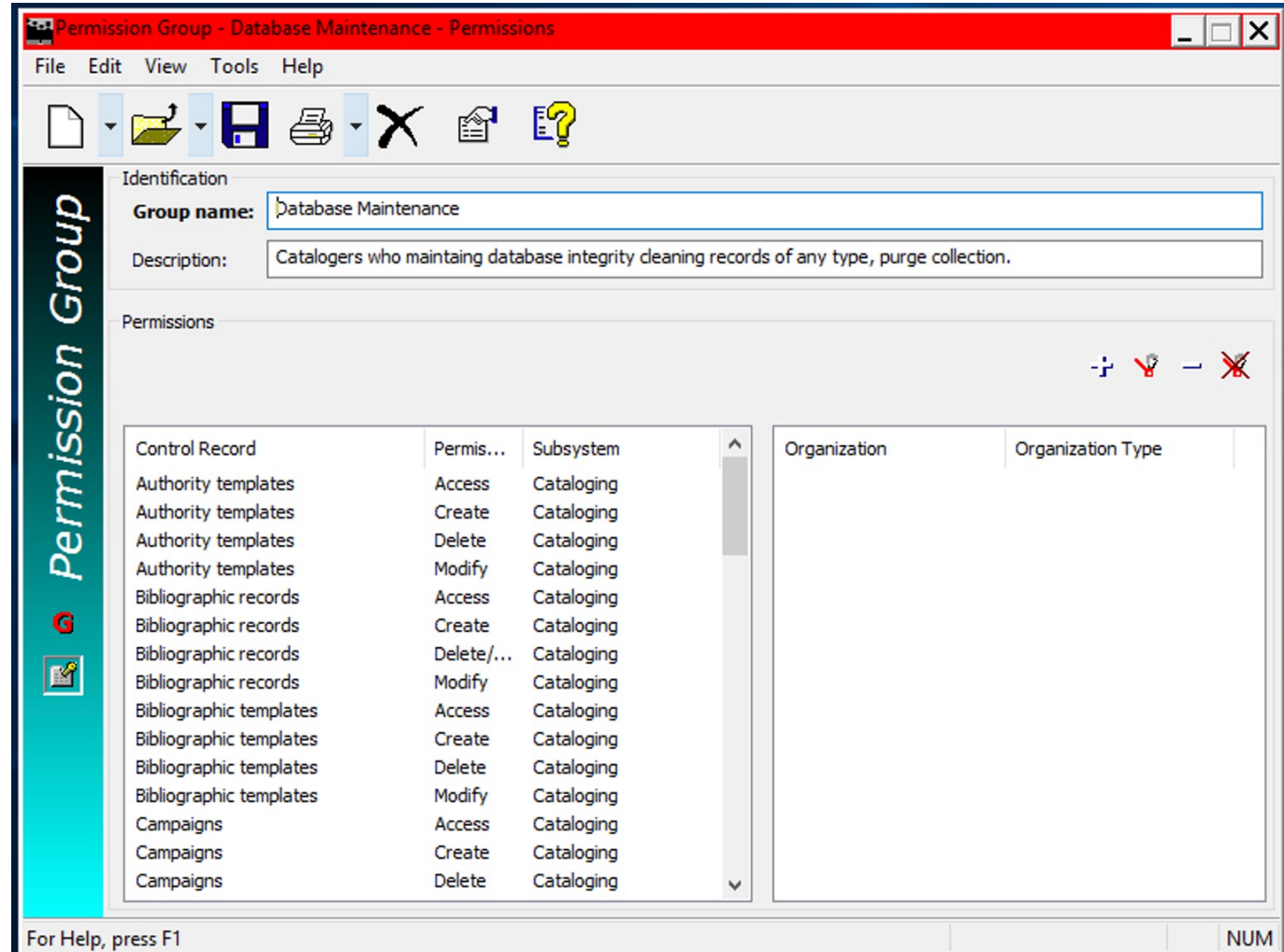
Permission - References

- At the end of several Polaris Guides is a permission reference

- Each permission is listed, what organizational levels it may be set at and the different permission types (Allow, Create, etc.) are listed and explained

Hint:
Permission references are included in the following Guides:
Administration
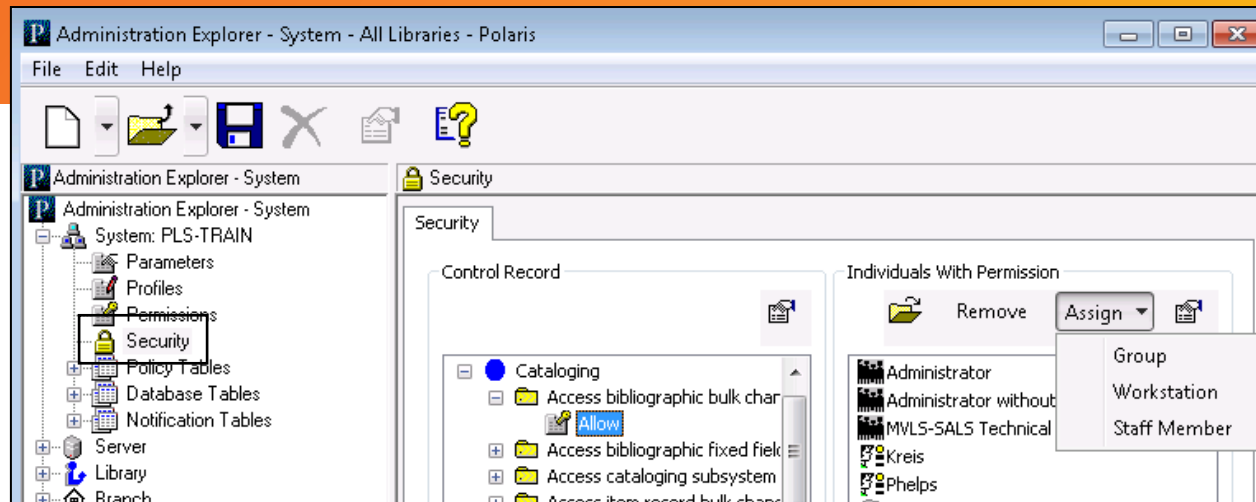Patron Services Administration
Acquisitions Administration
Cataloging Administration
Serials Administration

Permissions - Security

Hint
This is an easy way to check which staff members have a certain permission

- Using the Security view of Administration Explorer, you can list all the permissions available at each organizational level in Polaris

- In one step, you can add or remove multiple staff members, workstations, or group for a selected permission at a particular organization

- The Control Record list displays all the permissions available for that level, organized in subsystem folders

- The Individuals with Permission list displays all the staff members, workstations, and groups that have a selected permission

Reviewing Parameter & Profile Settings

There are two types of settings - ones that open a dialog box and ones that do not.

Settings that open a dialog box have this icon to the left: 🗔

Settings that do not open a dialog box have different icons depending on where they are modified.

- modified at the system level, seen at all organizational levels

- modified at the library level, seen at the branch and library organizational levels

- modified at the branch level, seen at the branch organizational level

- not modified/still has the default value, seen at all organizational levels

Setting parameters and profiles

- Parameter and profile settings customize the Polaris staff and public access applications for the specific organizations, workstations, and staff members in your system

- You can set parameters and profiles by any of the following methods:
  - Going to the level and entering a setting
  - Giving (transmitting) a setting to multiple lower organizations, workstations, and staff members
  - Taking (inheriting) the setting from the next level above.
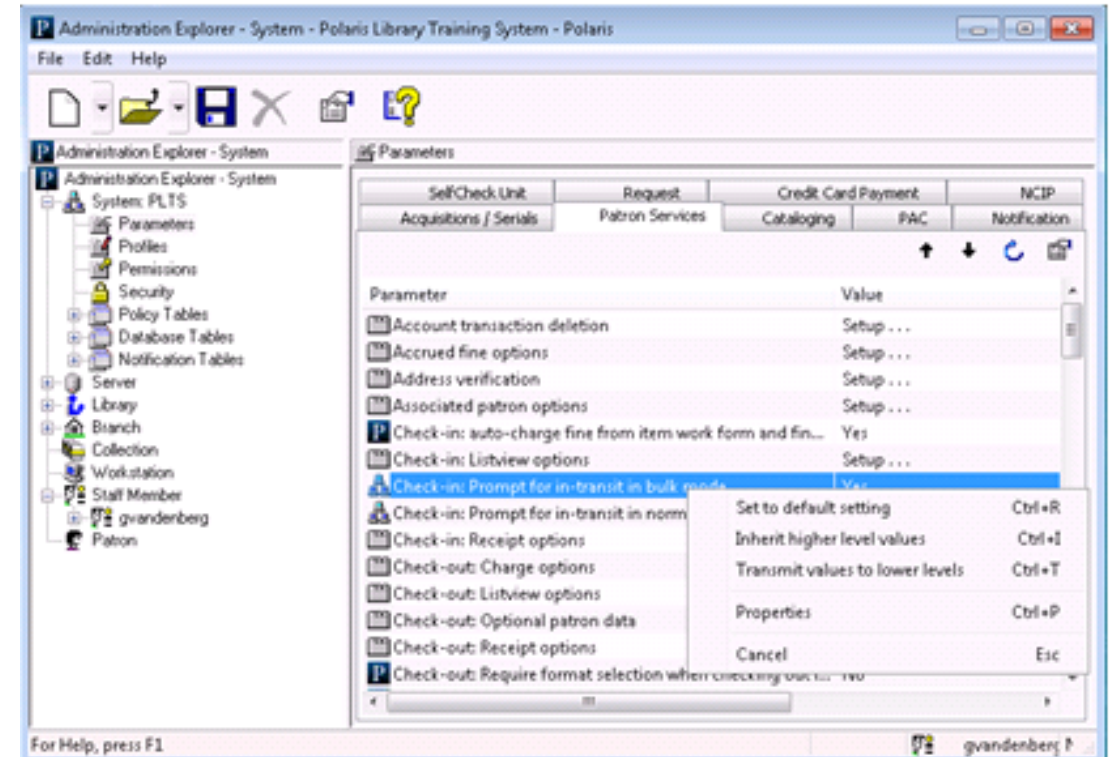
Parameters

- Parameters are guidelines for the way Polaris operates
- They are set at the system, library and branch levels and are organized in the following categories:
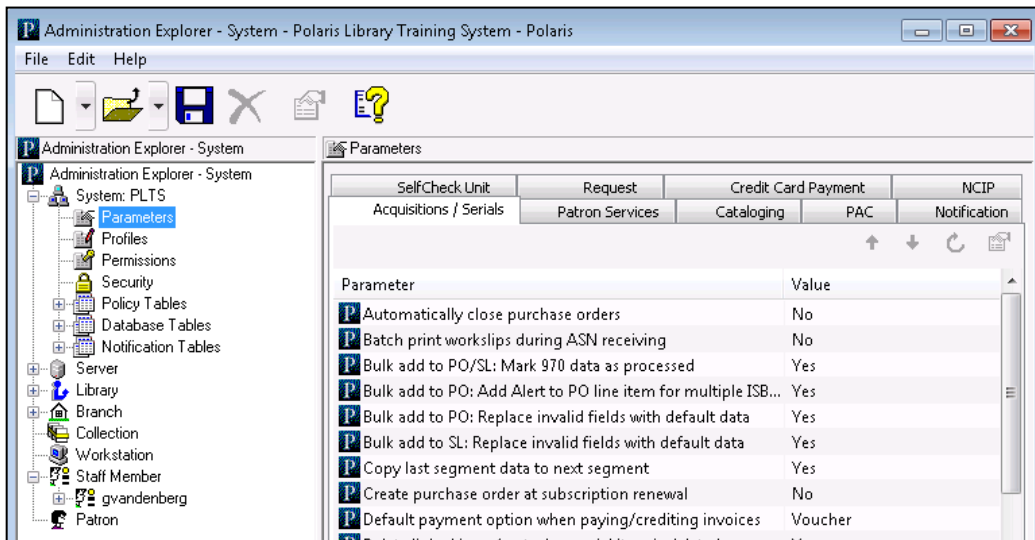
Acquisitions/Serials	SelfCheck Unit
Patron Services	Request
Cataloging	Credit Payment
PAC	NCIP
Notification	

Profiles

- Profiles represent library policies in the operation of Polaris, and define what is displayed in the staff client and PAC user interfaces
- They apply to system, library, branch, workstation, and staff levels and are organized in the following categories:
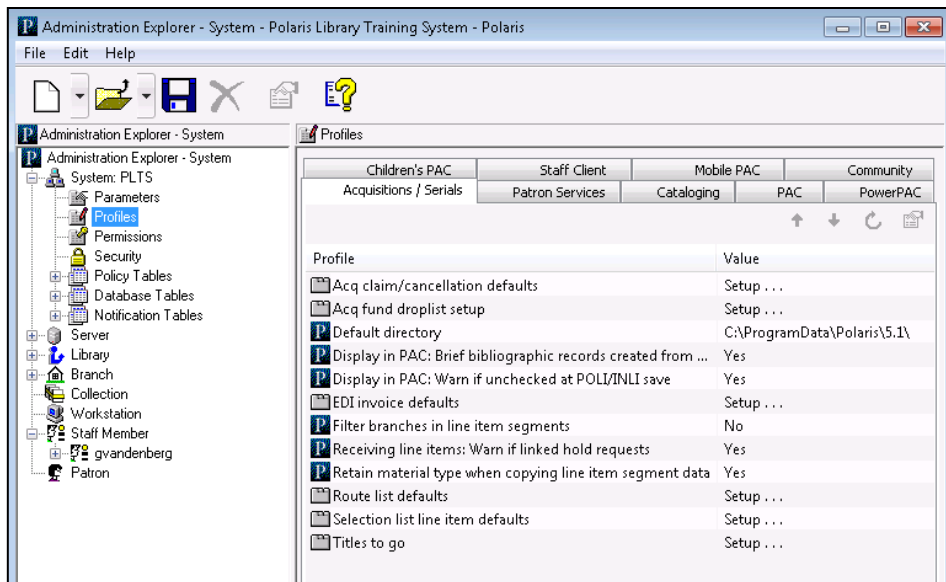
Acquisitions/Serials	Children's PAC
Patron Services	Staff Client
Cataloging	Mobile PAC
PAC	Community
PowerPAC	

Parameter and Profile references

- At the end of several Polaris Guides are references for Parameters and Profiles for each subsystem
- Each Parameter or Profile is described, what organizational levels it may be set at and, if applicable, the default setting
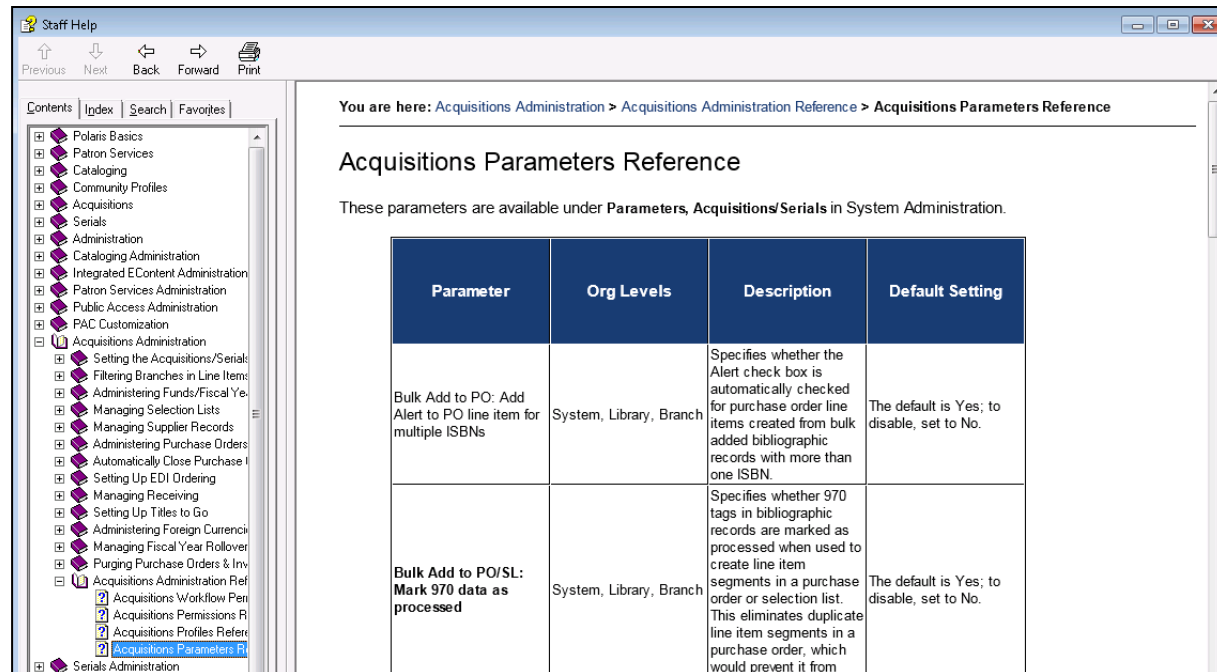
Hint
Parameter & Profile references are included in the following Guides:
Administration
Patron Services Administration
Acquisitions Administration
Cataloging Administration
Serials Administration

SQL Jobs

- Year End Circ Count Rollover

Administering the ILS

Reports

- Find tool "reports"
- System Reports
- Simply Reports
    - Use to help find/fix problems
    - Create for staff use

Find Tool

Use the find tool first!

- Filter items to find just what is needed!
- Work with results in Polaris

System Reports

Reports for you to use that have been made by Polaris

Simply Reports

- What reports to you have scheduled and sent?
  - Are they giving you the results you want?
- Are there reports you need to create?
  - Yearly statistics?
  - Board/Gov. reports
- Delete any unneeded scheduled/saved/ad-hoc reports

Community

- Library and surrounding area

- Supportal

- Innovative Users Group

- Intl/ National/ Regional library and user groups

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Learning

Opportunities for custom training, workshops and free content

Training: https://www.iii.com/services/training-and-certification/

Workshops: https://bookwhen.com/innovative

Free Content: Training and Learning Center (https://support.iii.com)

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THANK YOU

Questions?