



The Accidental Polaris System Administrator

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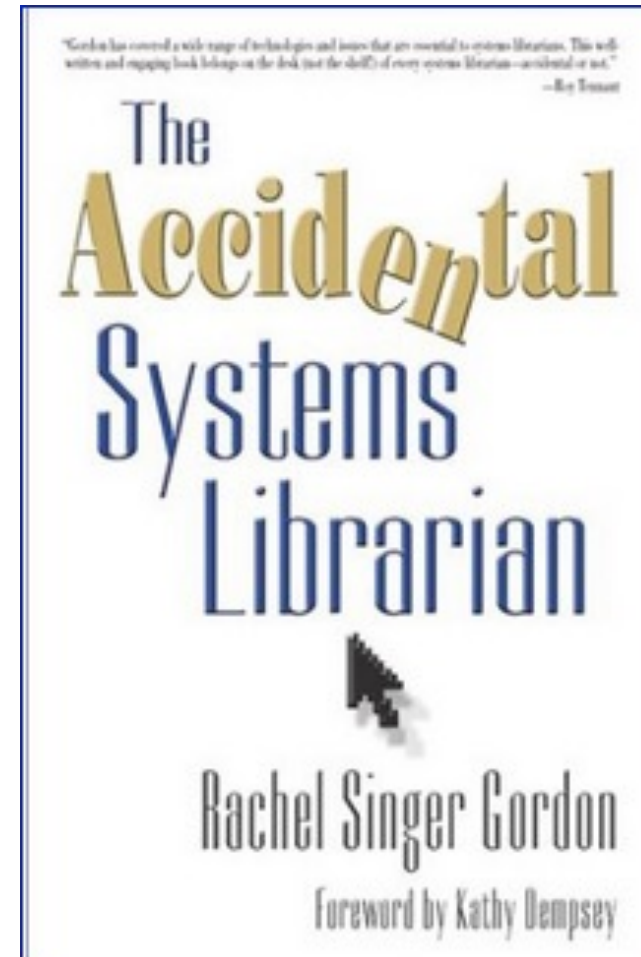
The Accidental Systems Librarian

Rachel Singer Gordon

2006 (3rd Edition)

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Google Preview: https://www.google.com/books/edition/_/f77CwJ2g0GAC?hl=en&gbpv=0



Administering the ILS

- Don't do it alone!



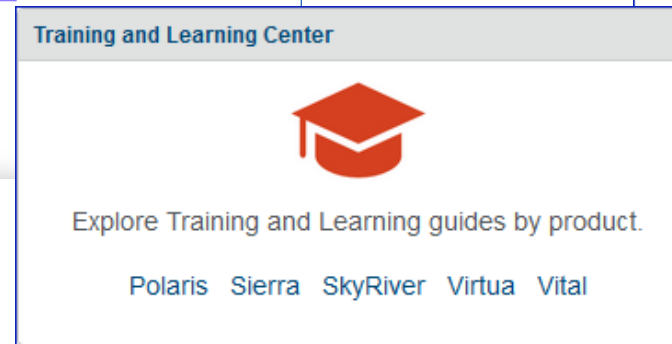
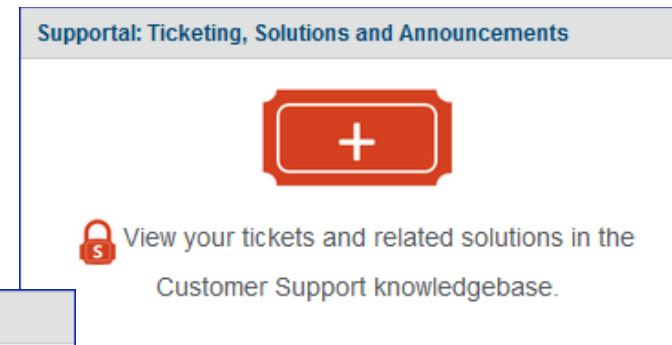
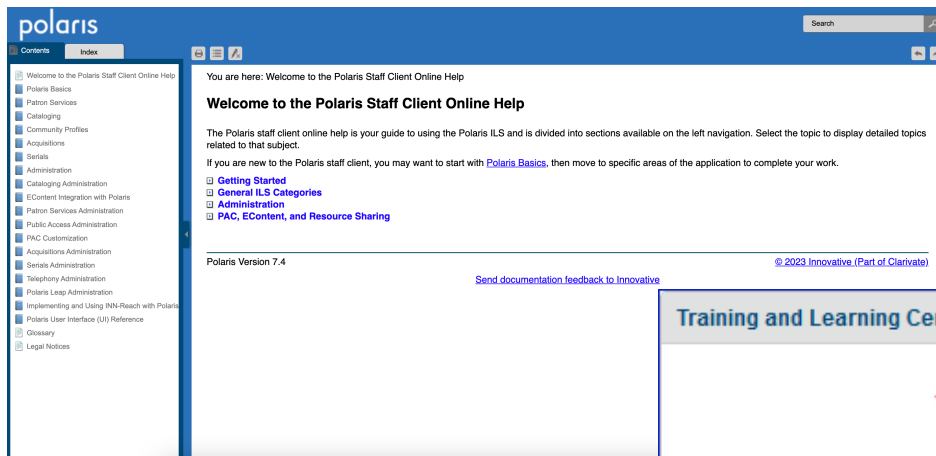
Administering the ILS

Know your resources!

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

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

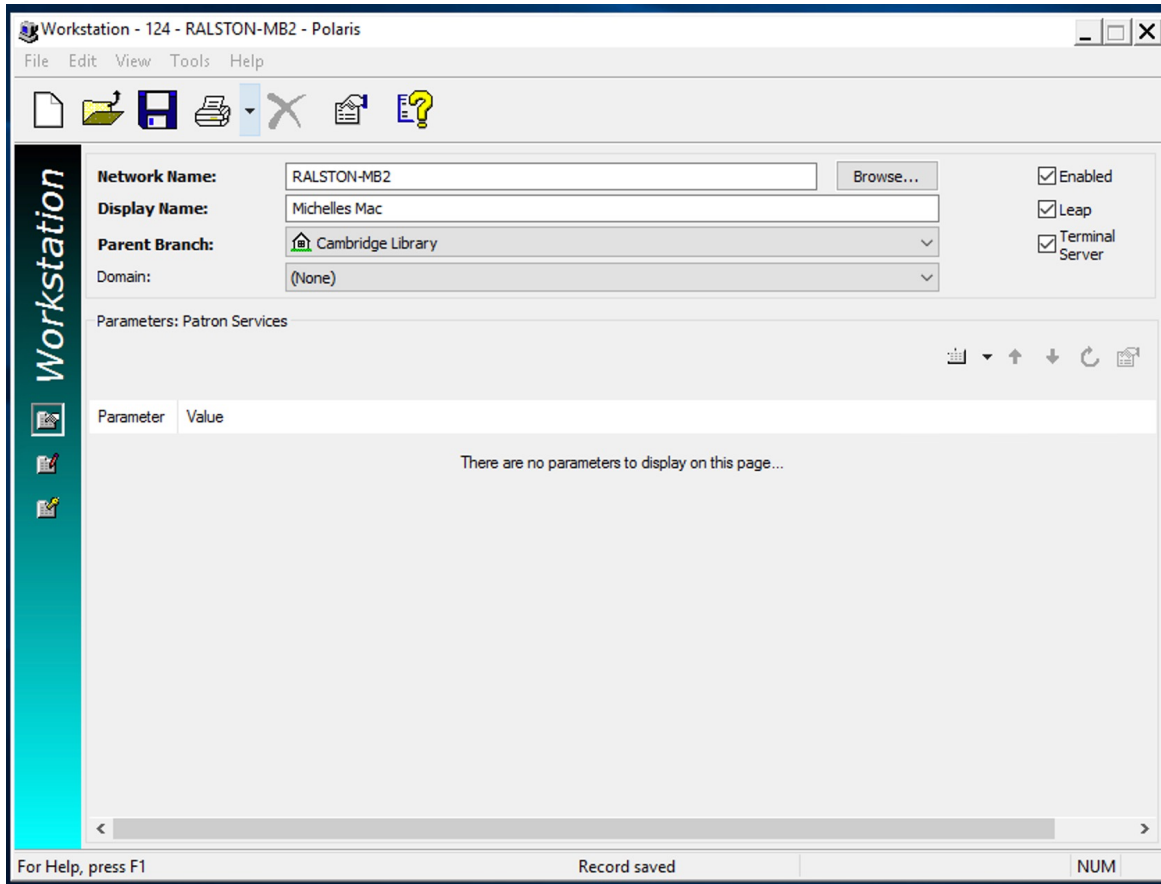
Supportal: <https://support.iii.com> (Requires Supportal Login)



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



Staff Member Records

- Review staff changes throughout the year
- Run any reports that are staff member based
- Make suspend or delete staff records



Staff Member - 82 - michelle12 - Polaris

File Edit View Tools Help

Account

Active
 Suspend

Name: michelle12

Email Address:

Organization: Ralston Library System

Affiliated Branch: Cambridge Library

Domain: (None)

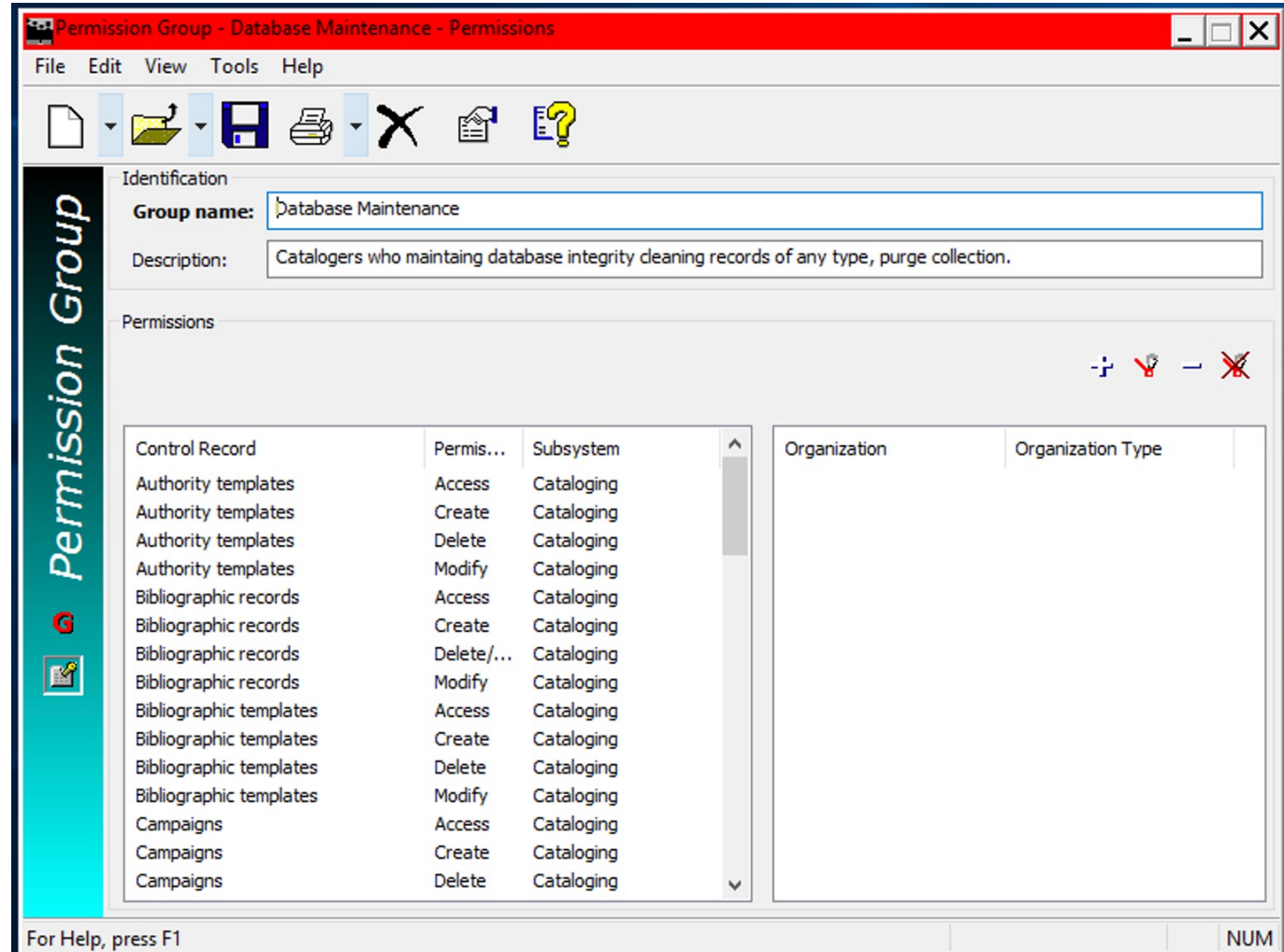
Profiles: Acquisitions / Serials

Profile	Value
Acq fund droplist setup	Setup ...
Override acquisitions blocks	No
Override serials blocks	No
Retain material type when copying line item segment data	Yes
Route list defaults	Setup ...
Selection list line item defaults	Setup ...

For Help, press F1

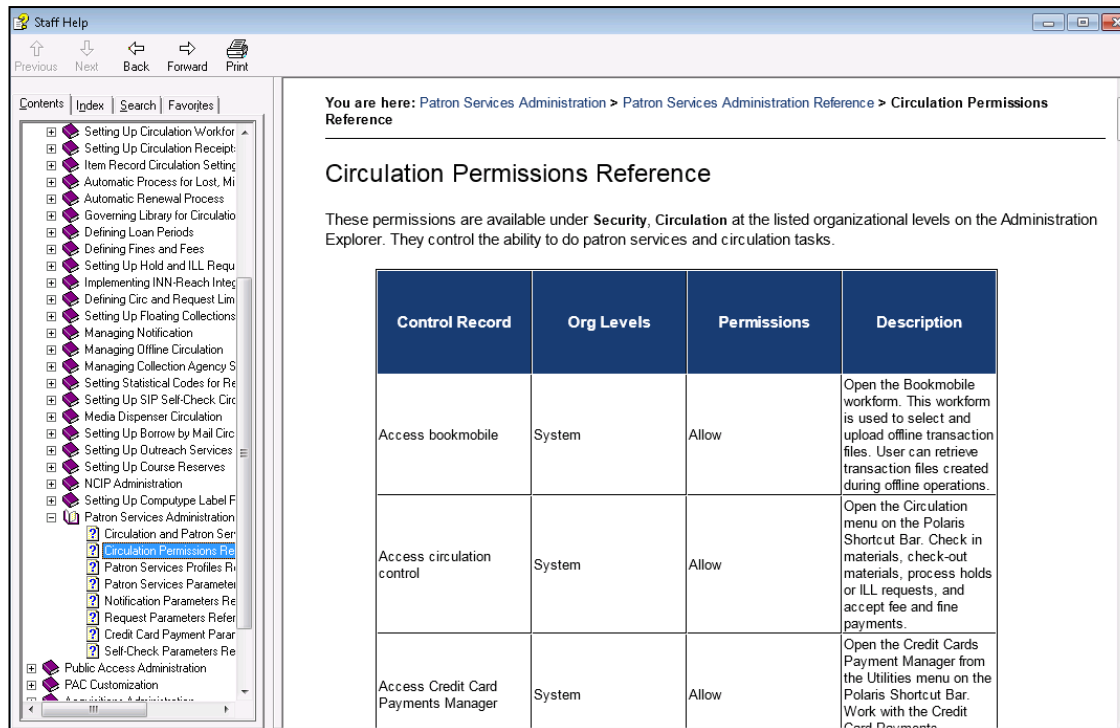
Permissions

- 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

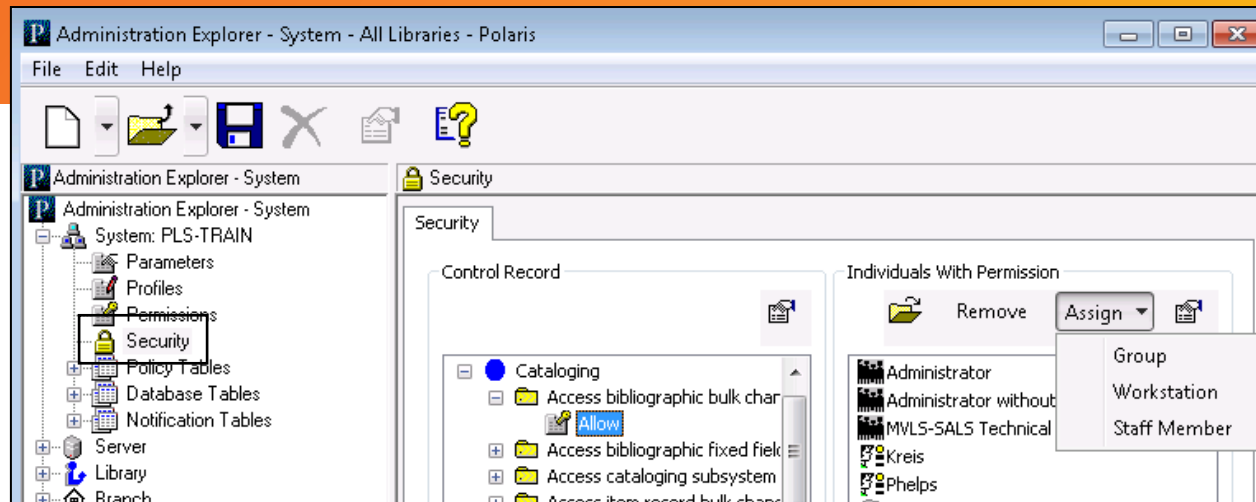
Cataloging Administration

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 groups 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



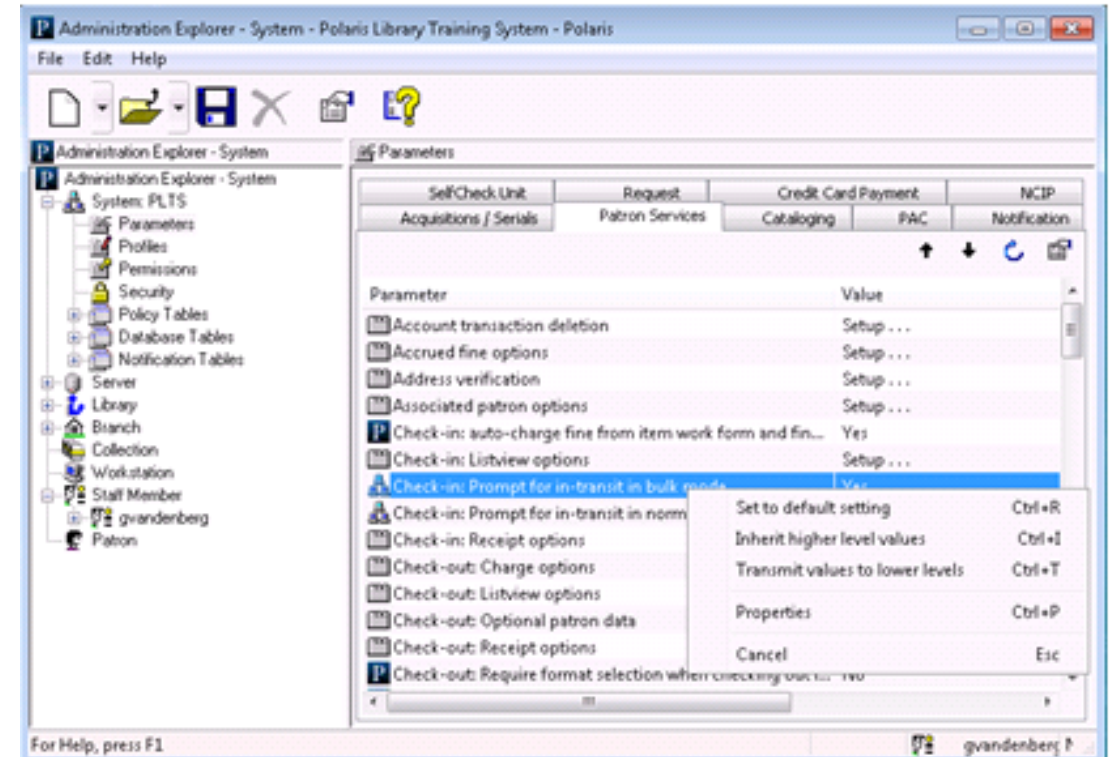
- modified at the branch level, seen at the branch organizational level



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

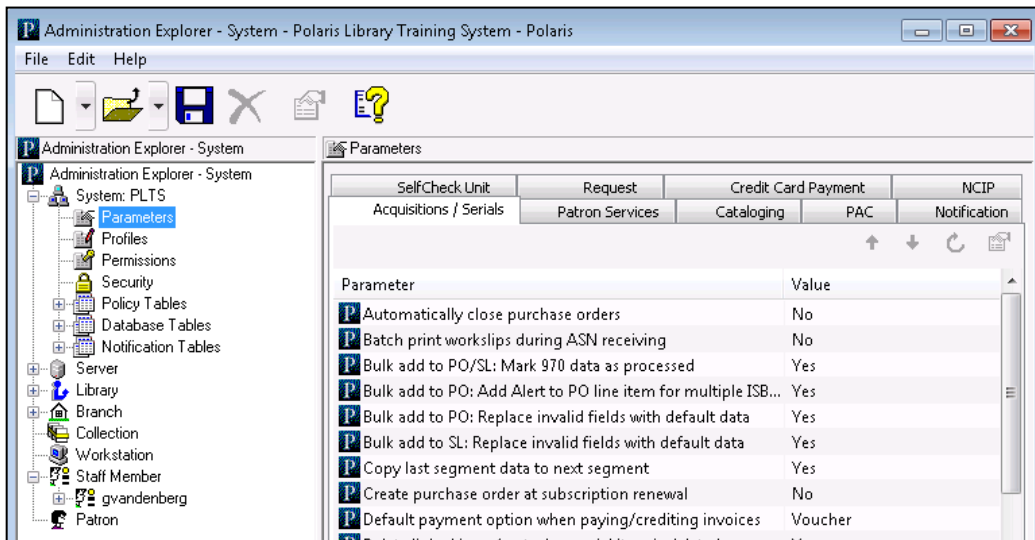
Setting parameters and profiles

- 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

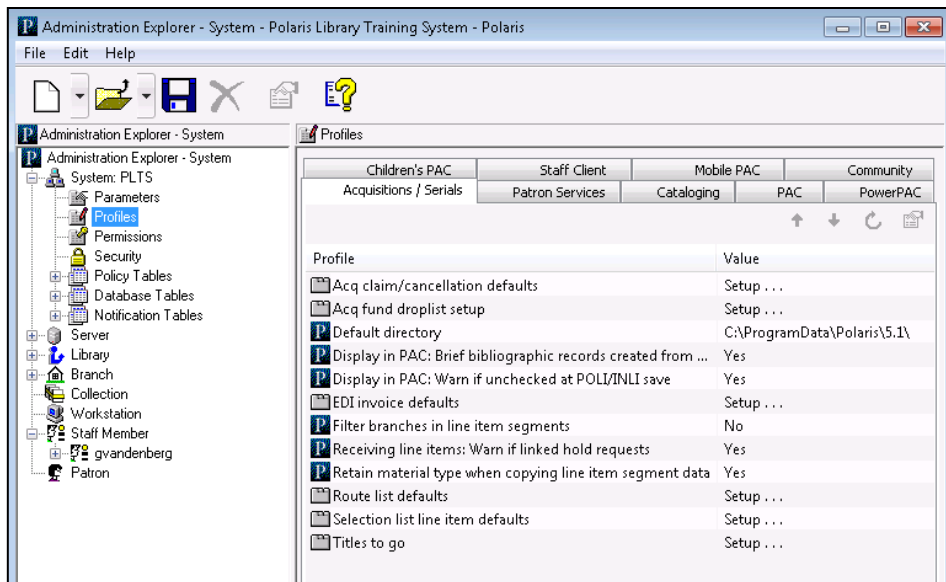
PAC

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

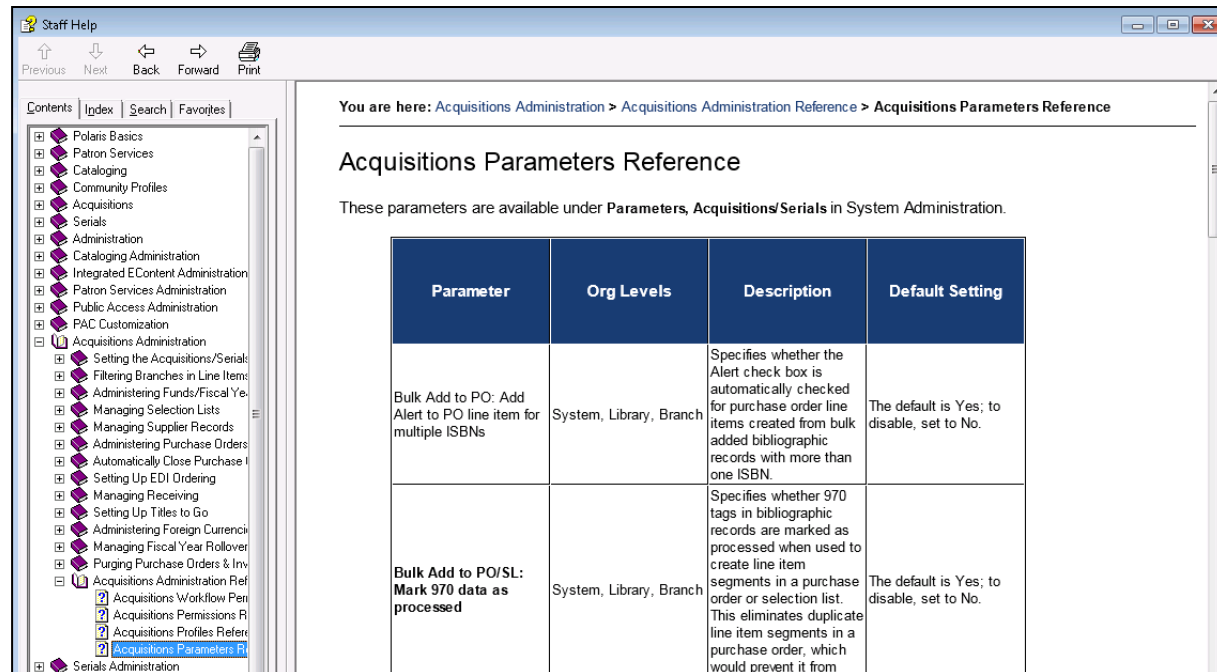
Parameter & Profile references are included in the following Guides:
Administration

Patron Services Administration

Acquisitions Administration

Cataloging Administration

Serials Administration



Staff Help

Previous Next Back Forward Print

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Polaris Basics
Patron Services
Cataloging
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Acquisitions
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Integrated EContent Administration
Patron Services Administration
Public Access Administration
PAC Customization
Acquisitions Administration
Setting the Acquisitions/Serials
Filtering Branches in Line Items
Administering Funds/Fiscal Year
Managing Selection Lists
Managing Supplier Records
Administering Purchase Orders
Automatically Close Purchase Orders
Setting Up EDI Ordering
Managing Receiving
Setting Up Titles to Go
Administering Foreign Currencies
Managing Fiscal Year Rollover
Purging Purchase Orders & Inventory
Acquisitions Administration Reference
Acquisitions Workflow Pen
Acquisitions Permissions Reference
Acquisitions Profiles Reference
Acquisitions Parameters Reference
Serials Administration

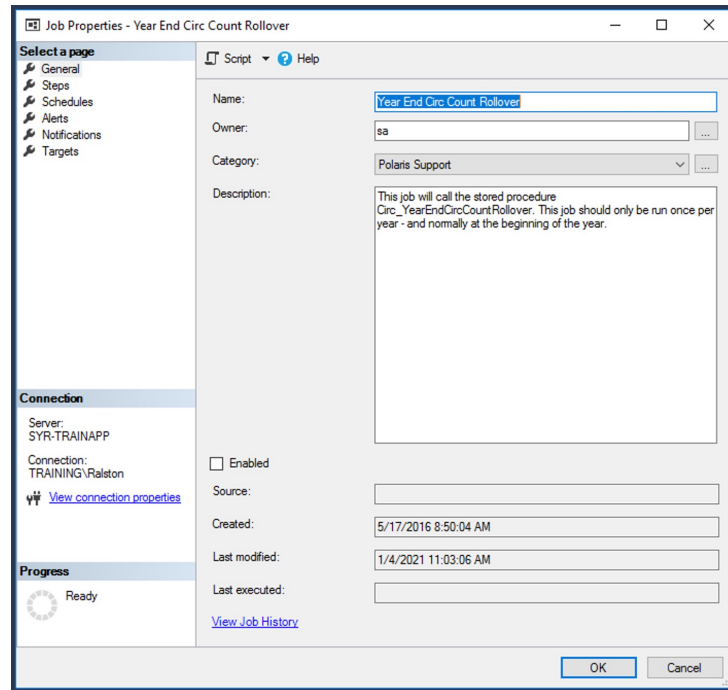
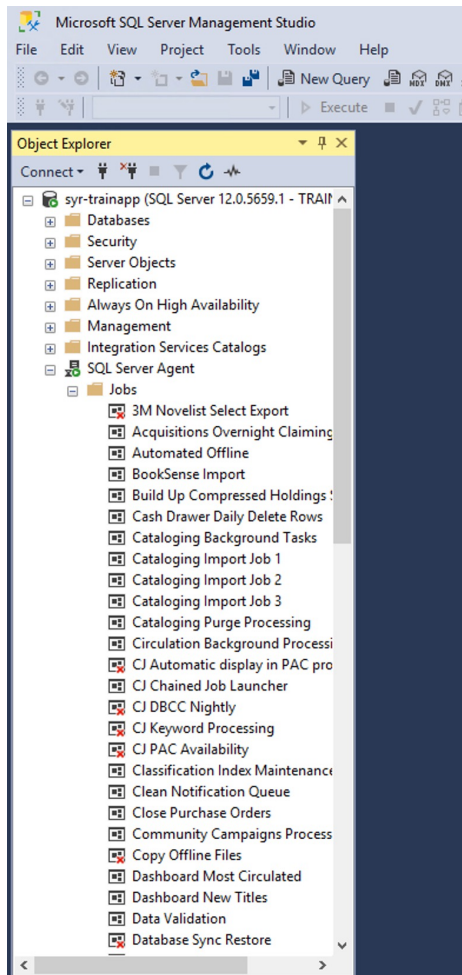
You are here: Acquisitions Administration > Acquisitions Administration Reference > Acquisitions Parameters Reference

Acquisitions Parameters Reference

These parameters are available under Parameters, Acquisitions/Serials in System Administration.

Parameter	Org Levels	Description	Default Setting
Bulk Add to PO: Add Alert to PO line item for multiple ISBNs	System, Library, Branch	Specifies whether the Alert check box is automatically checked for purchase order line items created from bulk added bibliographic records with more than one ISBN.	The default is Yes; to disable, set to No.
Bulk Add to PO/SL: Mark 970 data as processed	System, Library, Branch	Specifies whether 970 tags in bibliographic records are marked as processed when used to create line item segments in a purchase order or selection list. This eliminates duplicate line item segments in a purchase order, which would prevent it from	The default is Yes; to disable, set to No.

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

The screenshot shows the 'Find Tool - Item Record' interface. At the top, there is a 'Search Filter' header with a trash icon and an eye icon. Below this, the filter criteria are displayed in a tree structure:

- AND (dropdown)
 - Assigned branch (dropdown) = (dropdown) Pottersville Public Library (PPL) (dropdown) [Red -] [Green +]
 - AND (dropdown)
 - Circulation status (dropdown) = (dropdown) Claim Missing Parts (dropdown) Claim Neve (dropdown) [Red -] [Green +]
 - Collection (dropdown) = (dropdown) Bestsellers (BEST) (dropdown) [Red -] [Green +]

At the bottom right, there are two buttons: 'APPLY' (in a teal box) and 'CANCEL' (in a white box with a grey border).

System Reports

Reports for you to use that have been made by Polaris

The image shows two overlapping windows. The top window is titled "Polaris Reports" and displays a tree view of report categories on the left and a table of available reports on the right. The categories include Acquisitions, Cataloging, Circulation, Custom, Notices, PAC, Public Services, Serials, and System. The table lists these categories as folders with their respective modification dates.

Name	Type	Date Modified
Acquisitions	Folder	1/20/2023 3:10 PM
Cataloging	Folder	1/20/2023 3:10 PM
Circulation	Folder	1/20/2023 3:11 PM
Custom	Folder	4/12/2023 12:51 PM
Notices	Folder	1/20/2023 3:11 PM
PAC	Folder	1/20/2023 3:11 PM
Public Services	Folder	1/20/2023 3:12 PM
Serials	Folder	1/20/2023 3:12 PM
System	Folder	1/20/2023 3:12 PM

The bottom window is titled "SQL Server Reporting Services" and shows a dashboard for the "Polaris" data source. It features a navigation bar with "Favorites" and "Browse" tabs, and a main area displaying "FOLDERS (9)" and "DATA SOURCES (1)". The folders are represented by icons and labels: Acquisitions, Cataloging, Circulation, Custom, Notices, PAC, Public Services, Serials, and System. The data source is labeled "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



The screenshot shows the 'SimplyReports' interface. At the top, there is a navigation bar with the 'polaris' logo and the title 'SimplyReports'. Below this, there are several menu items: 'Patrons', 'Patron Account', 'Holds', 'Items', 'Bibs', 'Authorities', 'Serials', 'Funds', and 'Invo'. A secondary navigation bar contains 'My reports', 'File maintenance', and 'Scheduled jobs'. The 'File maintenance' section is active, displaying a dropdown menu for 'Ad-Hoc reports files'. Below the dropdown, there is a 'Select all' checkbox and a table of reports. The table has columns for 'Select', 'File name', 'Creation date', and 'File size'. The reports listed include various BibCounts and BibLists files, each with a checkbox for selection, a file name, a creation date, and a file size.

Select	File name	Creation date	File size
<input type="checkbox"/>	BibCounts_123501.xls	8/31/2020	599
<input type="checkbox"/>	BibCounts_280006.xls	8/31/2020	830
<input type="checkbox"/>	BibCounts_415577.xls	9/21/2020	299
<input type="checkbox"/>	BibLists_100583.xls	11/1/2017	3121
<input type="checkbox"/>	BibLists_107861.xls	8/31/2020	13692
<input type="checkbox"/>	BibLists_14015.xls	7/3/2019	738360
<input type="checkbox"/>	BibLists_140401.xls	5/14/2020	12
<input type="checkbox"/>	BibLists_142799.xls	8/31/2020	455891
<input type="checkbox"/>	BibLists_185230.xls	9/22/2020	520
<input type="checkbox"/>	BibLists_2569.xls	5/14/2020	149334
<input type="checkbox"/>	BibLists_297670.xls	9/21/2020	940
<input type="checkbox"/>	BibLists_312923.xls	8/21/2018	232
<input type="checkbox"/>	BibLists_326938.xls	6/21/2019	136672
<input type="checkbox"/>	BibLists_336477.xls	8/22/2018	588
<input type="checkbox"/>	BibLists_378579.xls	8/21/2018	19
<input type="checkbox"/>	BibLists_382113.xls	8/22/2018	3365
<input type="checkbox"/>	BibLists_416824.xls	8/31/2020	6210
<input type="checkbox"/>	BibLists_468249.xls	6/21/2019	677435
<input type="checkbox"/>	BibLists_478771.xls	8/22/2018	1622
<input type="checkbox"/>	BibLists_50440.xls	9/21/2020	446128
<input type="checkbox"/>	BibStats_242168.xls	6/21/2019	450
<input type="checkbox"/>	BibStats_479582.xls	6/21/2019	1449
<input type="checkbox"/>	HoldCounts_105293.xls	10/3/2019	3409
<input type="checkbox"/>	HoldCounts_11373.xls	6/21/2019	57

Community

- Library and surrounding area
- Supportal
- Innovative Users Group
- Intl/ National/ Regional library and user groups

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>)



THANK YOU

Questions?