



# IUG 24.

TOGETHER WE DRIVE INNOVATION

March 25 - 27, 2024 | Detroit, Michigan

## Adding a New Library in Polaris

*BCCLS Consortium*

Margaret Rose O'Keefe, Cataloging & Special Projects Librarian


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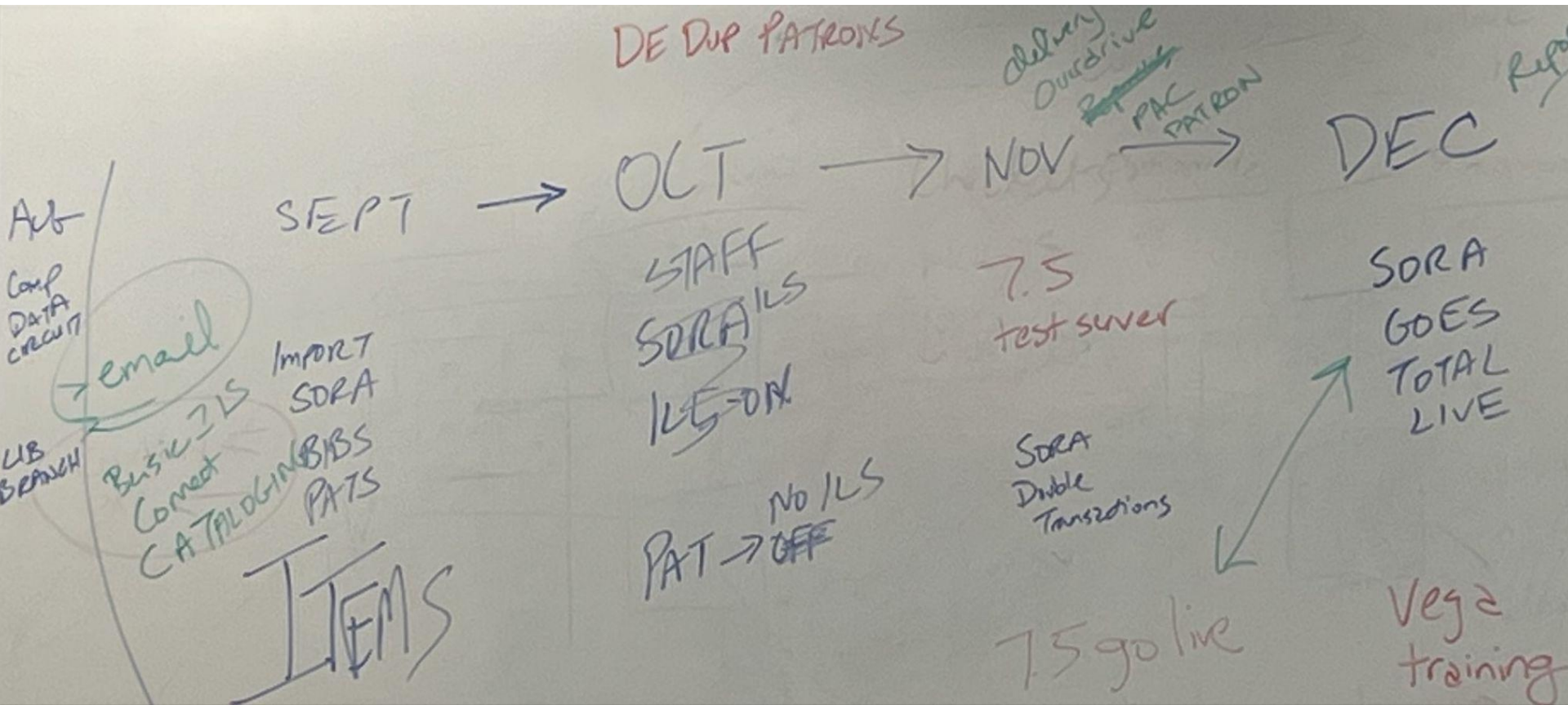
Brad Rogers & Dennis Carter (Innovative)



# Why Would You Want To Do This?

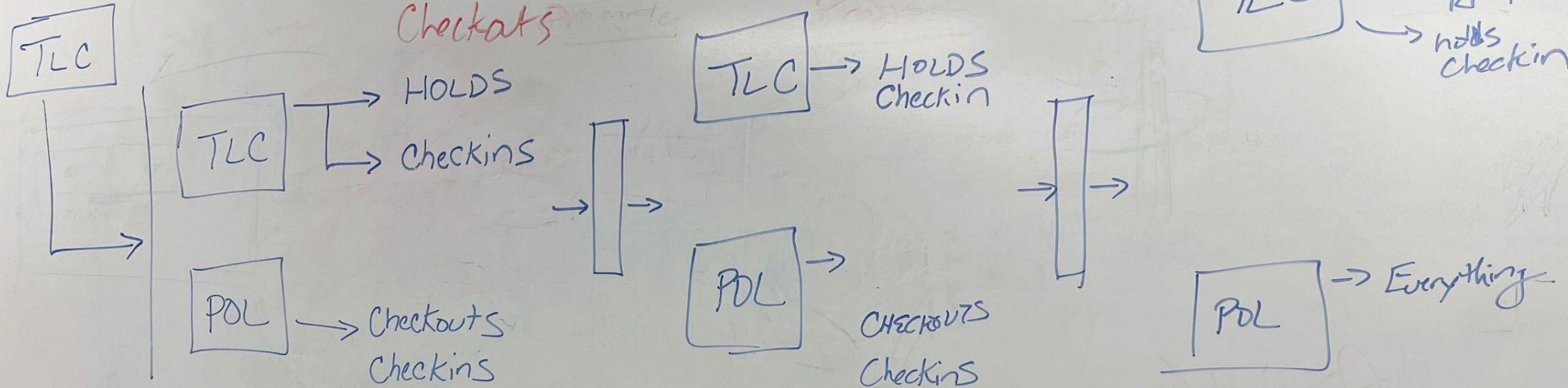
- ❖ **Backstory:** South Orange Public Library requested to join BCCLS, and our member libraries voted to approve their request. We couldn't schedule their migration with Innovative until March and TLC (their previous ILS) was going to bill them for another year on January 1st. So we decided to do the migration ourselves.
  - ❖ **Pros:**
    - Save money (amount varies by customer)
    - It can be done on your own schedule
  - ❖ **Cons:**
    - Circulation details did not carry over
    - Duplicate entry in two systems (this was our choice)
    - Labor intensive & it can save time to have Innovative do it
    - Requires deep familiarity with Polaris system administration
- 

# Whiteboard Brainstorming



Communication → Replace  
HOLDS

→ LAUNCH



OCT  
Collection = Storage

NOY

How to  
stop TLC  
Holds

DEC  
↑

Man thinks just  
cause taking

Dec 15

# Timeline (matches the whiteboards)





# Adding a library/branch in Polaris

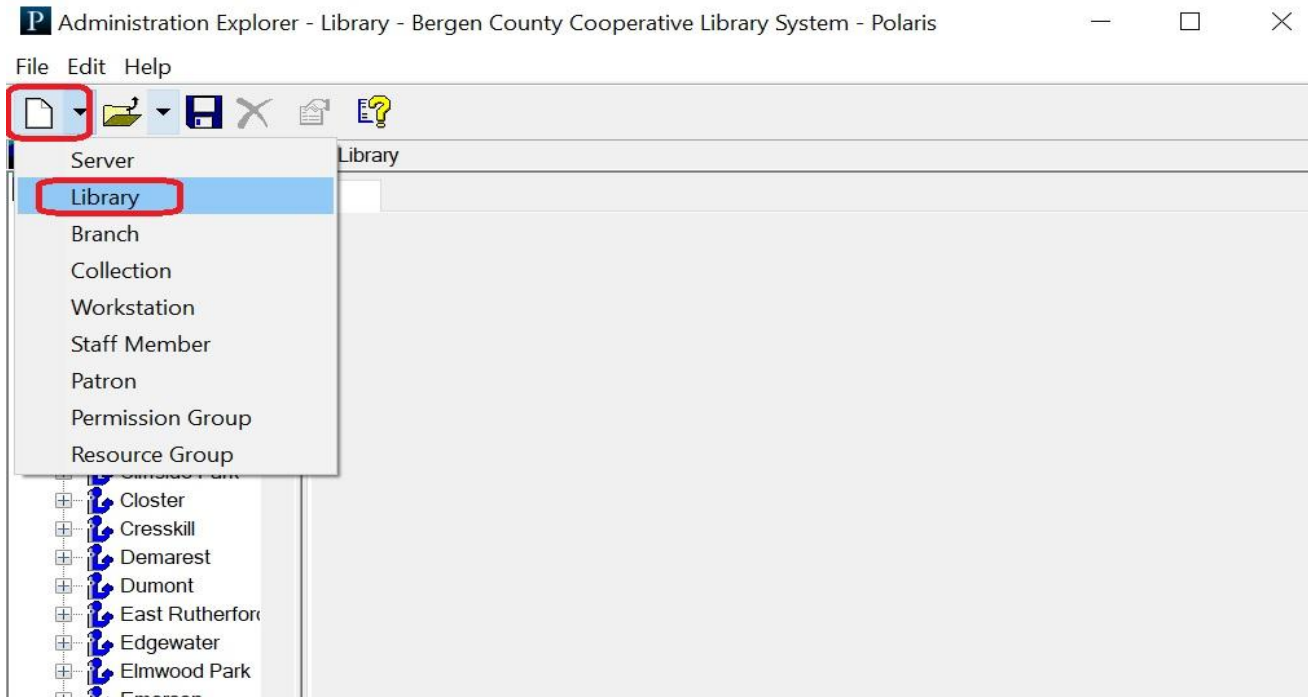
# Creating the library

- ❖ In the ILS, there is a hierarchy in which libraries are configured
  - System Level - The highest level in the ILS, usually refers to your consortium or library system
  - Library Level - The level that defines a library and its branch(es)
  - Branch - The lowest level that defines the particular branch location
- ❖ Creating a new library distinguishes it from other libraries within your system
- ❖ Library creation within the ILS is performed in System Administration
- ❖ Go to the Explorer view under the Administration tab and then select Library in order to see all libraries within your system



# Creating the library

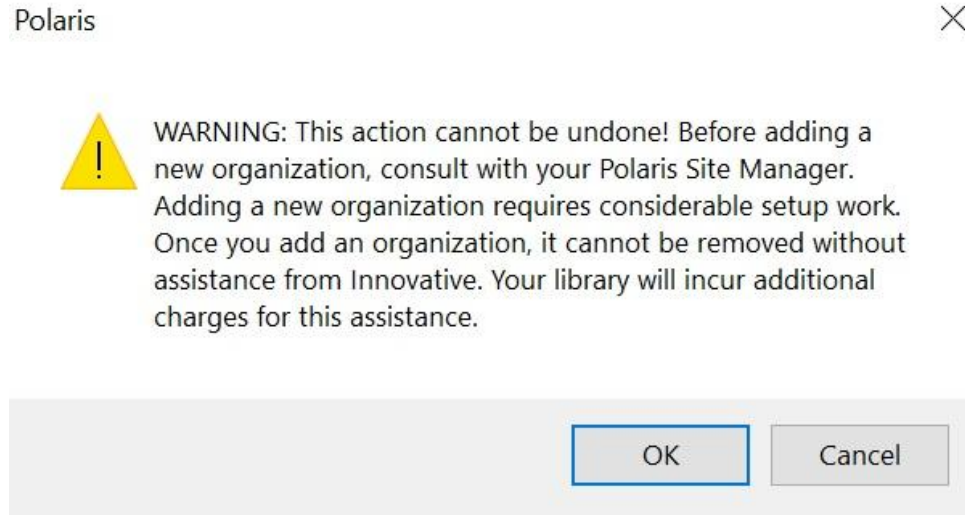
- ❖ Click the “paper” button in the top left corner, then select Library





# Creating the library

- ❖ When creating a new library, a warning will pop up indicating that creating a new library cannot be undone and will require a lot of setup



# Creating the library

- ❖ Enter the relevant information for the new library that you are creating (e.g. Address, Phone Numbers, Contact Representatives, Website, etc.)

New Library - Library 1 - Untitled - Polaris

File Edit View Help

Library

**Name:**  **Abbreviation:**

**Display Name:**  **Parent:** Bergen County Cooperative Library System

General

Addresses

**Library:**

Email:  WWW:

Contact Representatives:

**Primary:**

Alternate:

Phone Numbers

Primary:  Alternate:  Fax:

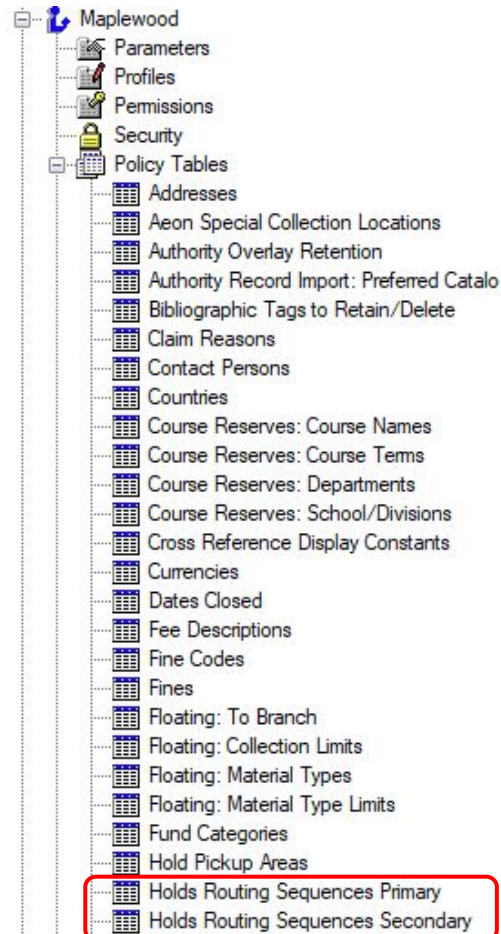
**Type of Library**

Error Reporting Email

For Help, press F1 NUM

# Copying over tables

- ❖ For our configurations, we used a pre-existing library as a template for creating the new one and copied over all the tables
- ❖ We edited tables as needed in order to keep all configurations accurate for the new library
- ❖ For example, we edited certain Policy Tables such as “Holds Routing Sequences Primary” and “Holds Routing Sequences Secondary”



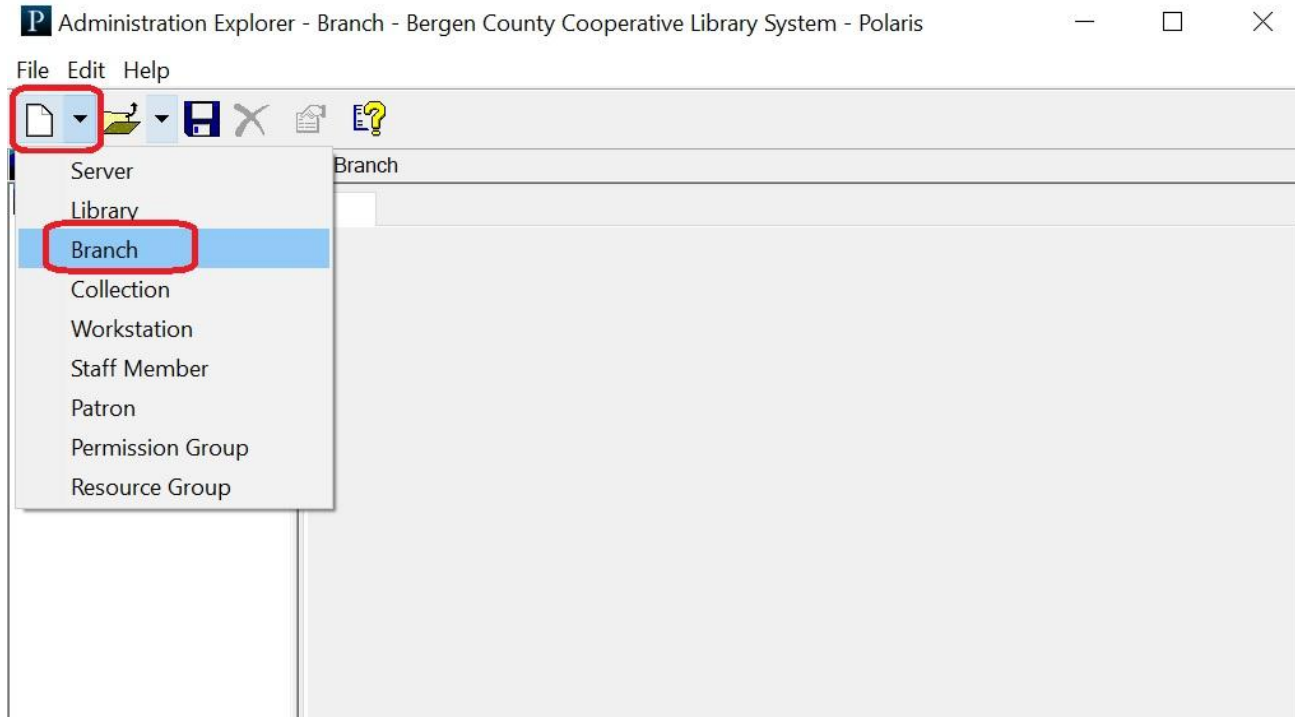
# Creating the branch

- ❖ Library branches are imperative when distinguishing the different locations that are available for a particular library
- ❖ Library branch creation within the ILS is also performed in System Administration
- ❖ Go to the Explorer view under the Administration tab and then select Branch in order to see all branches within your system



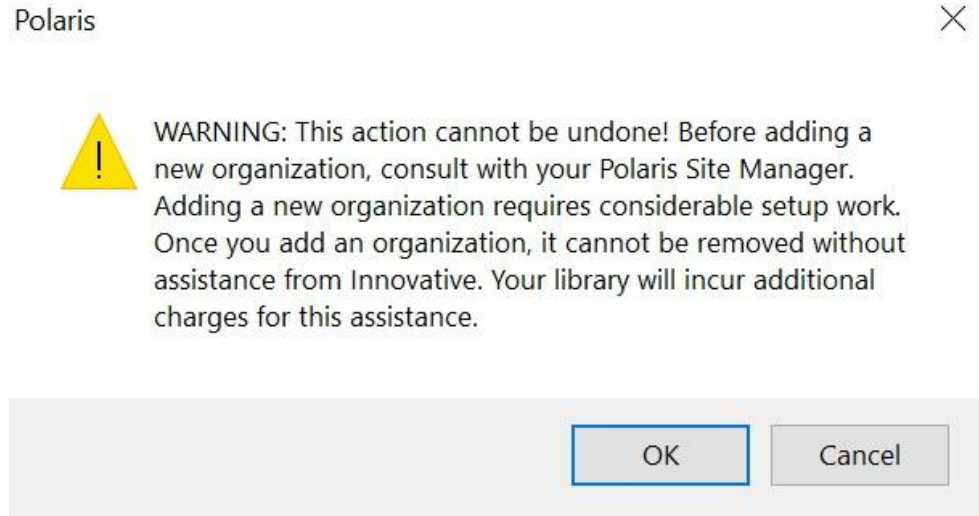
# Creating the branch

- ❖ Click the “paper” button in the top left corner, then select Branch



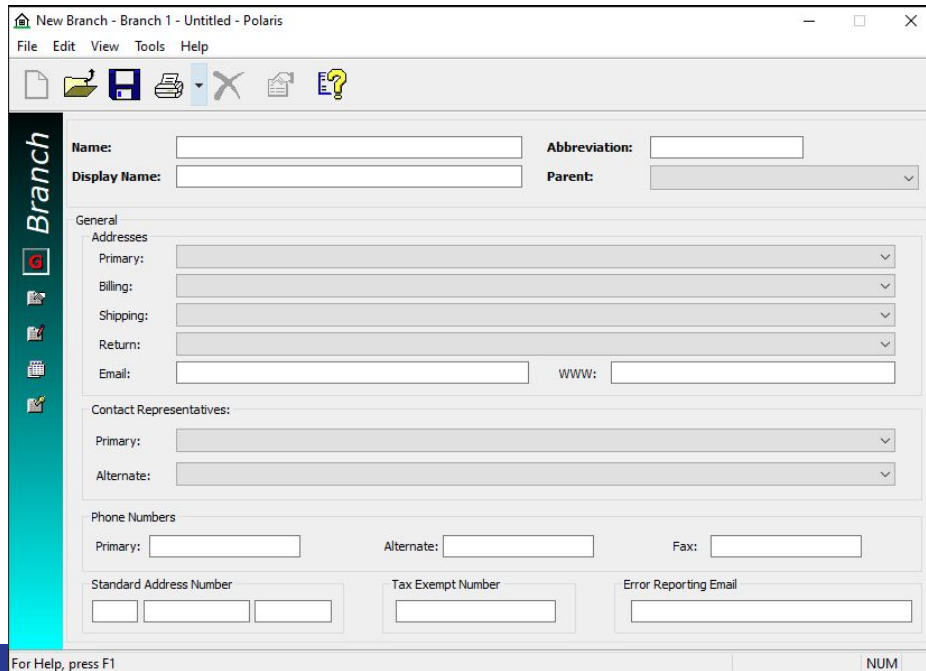
# Creating the branch

- ❖ When creating a new branch, a warning will pop up indicating that creating a new branch cannot be undone and will require a lot of setup



# Creating the branch

- ❖ Enter the relevant information for the new branch that you are creating (e.g. Address, Phone Numbers, Contact Representatives, Website, etc.)



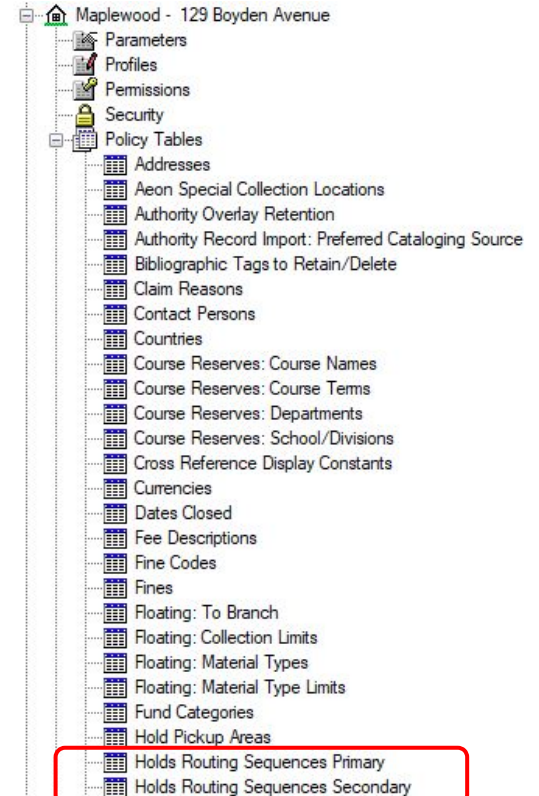
The screenshot shows a software window titled "New Branch - Branch 1 - Untitled - Polaris". The window has a menu bar with "File", "Edit", "View", "Tools", and "Help". Below the menu bar is a toolbar with icons for file operations. A vertical sidebar on the left is labeled "Branch" and contains several icons. The main area of the window is a form with the following sections:

- Name:** Text input field
- Abbreviation:** Text input field
- Display Name:** Text input field
- Parent:** Dropdown menu
- General** section:
  - Addresses:**
    - Primary:** Dropdown menu
    - Billing:** Dropdown menu
    - Shipping:** Dropdown menu
    - Return:** Dropdown menu
    - Email:** Text input field
    - WWW:** Text input field
  - Contact Representatives:**
    - Primary:** Dropdown menu
    - Alternate:** Dropdown menu
  - Phone Numbers:**
    - Primary:** Text input field
    - Alternate:** Text input field
    - Fax:** Text input field
  - Standard Address Number:** Three small text input fields
  - Tax Exempt Number:** Text input field
  - Error Reporting Email:** Text input field

At the bottom of the window, there is a status bar with the text "For Help, press F1" on the left and "NUM" on the right.

# Copying over tables - our branch configurations

- ❖ For our configurations, we used a pre-existing branch as a template for creating the new one and copied over all the tables
- ❖ We edited tables as needed in order to keep all configurations accurate for the new branch
- ❖ For example, we edited certain Policy Tables such as “Holds Routing Sequences Primary” and “Holds Routing Sequences Secondary”





# Copying over tables - Innovative's branch configurations

- ❖ The following are all particular tables that we sent over to our site manager in order to get our configurations from other pre-existing branches into our new branch
  - Branch > Policy Tables > Item Availability Display Order
  - Branch > Policy Tables > Item Statistical Class Codes
  - Branch > Policy Tables > Patron Statistical Class Codes
  - Branch > Policy Tables > PAC Limit by Display
- ❖ This may be done in SQL on your own if you are skilled enough but we chose to do it this way to make things easier

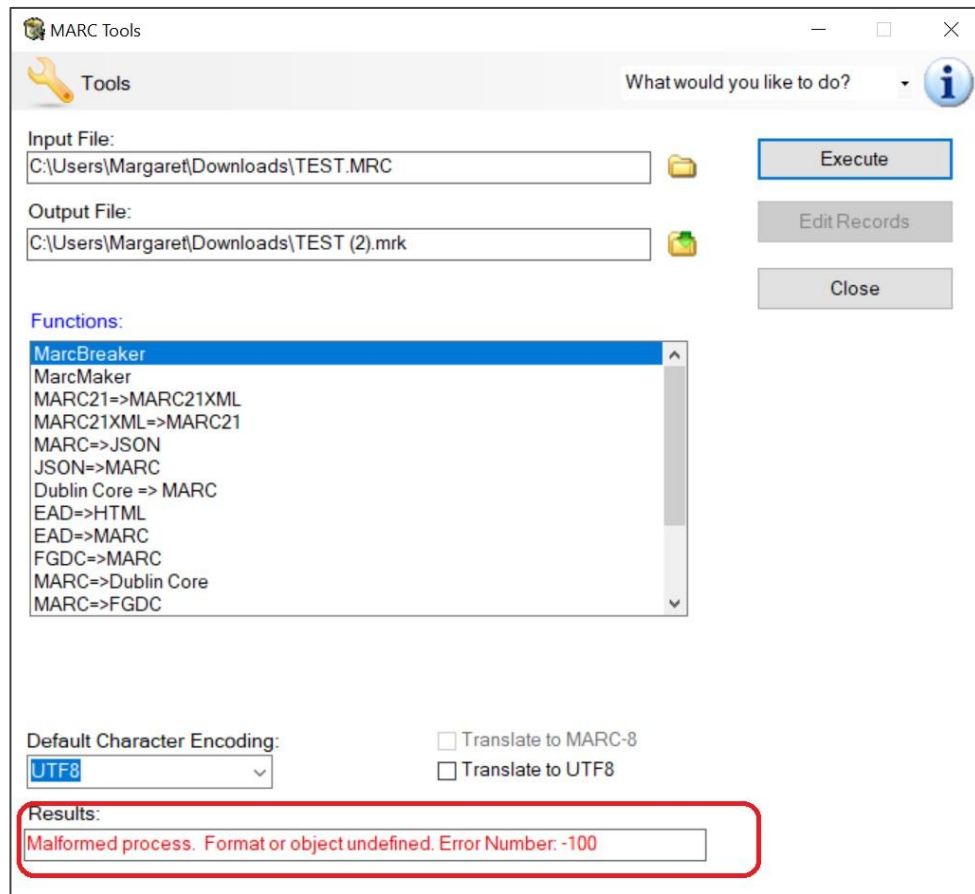
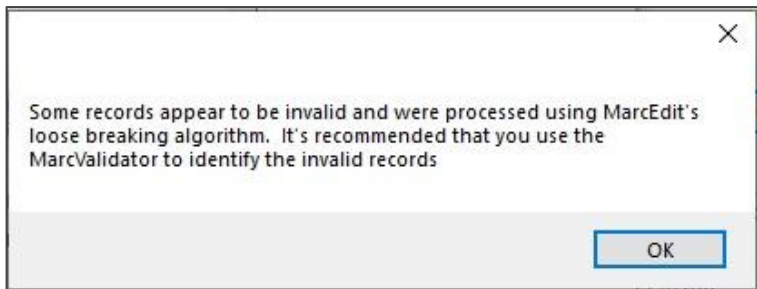




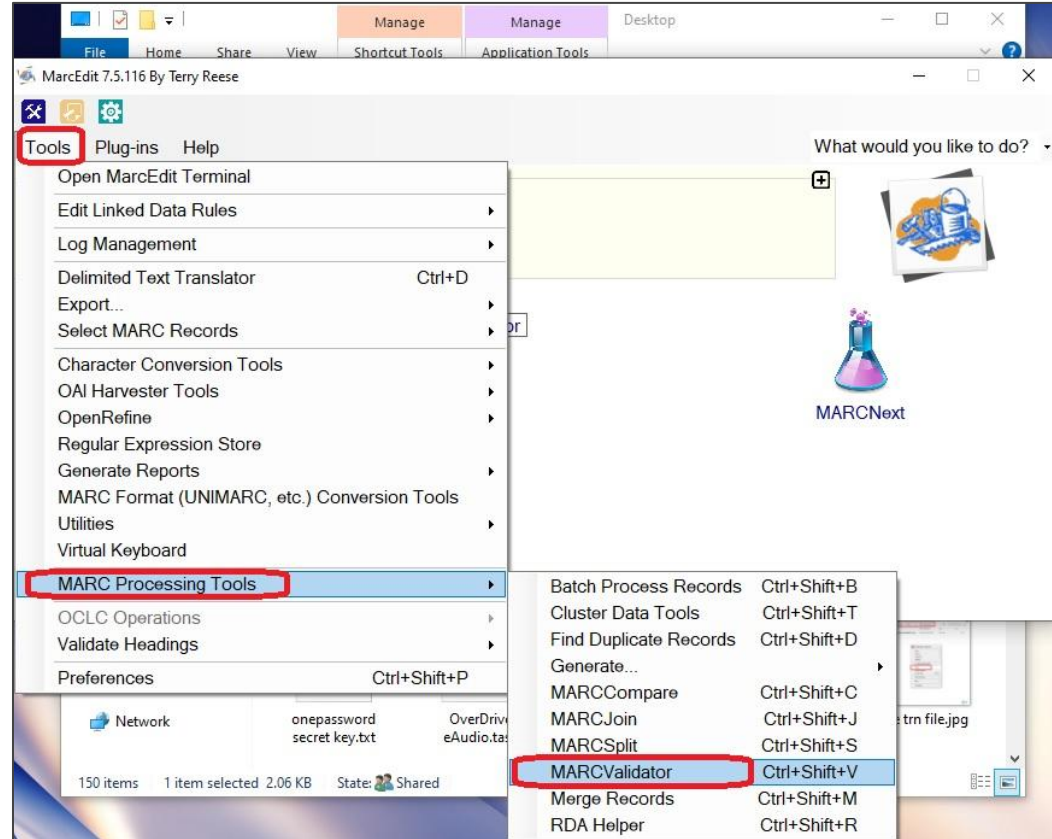
# Importing bib. and item records

# Obtaining MARC files

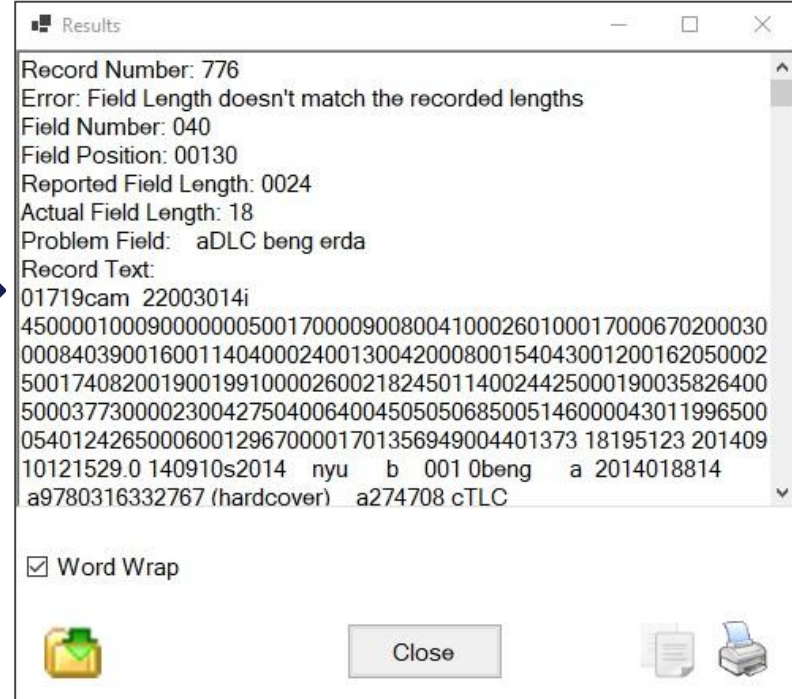
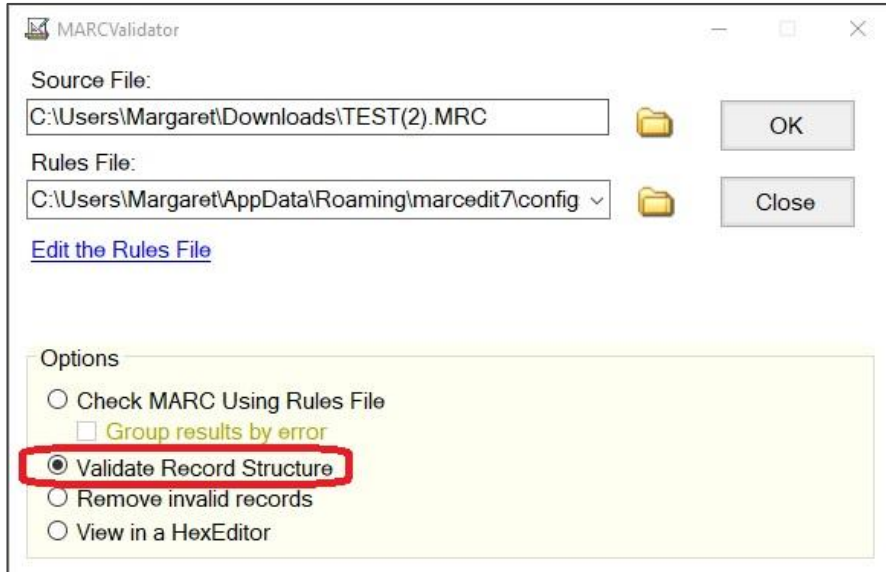
- ❖ We started with the library sending us a TEST MARC file
- ❖ We had errors right away



# Using MARC Validator



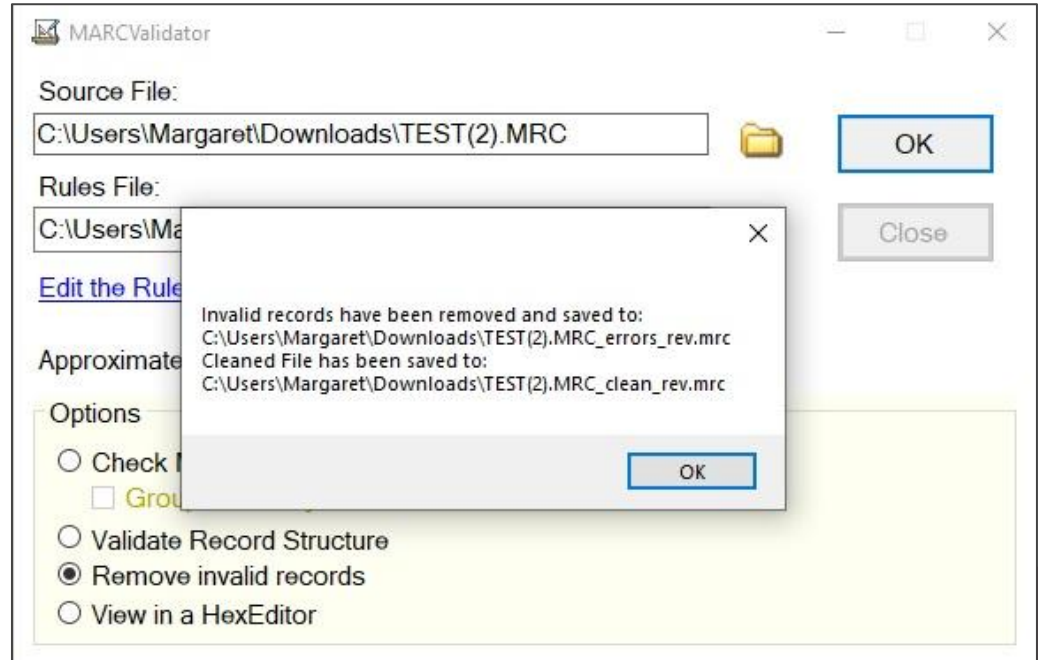
# Using MARC Validator



- ❖ We used “Validate Record Structure” since the results were a more manageable size than when using “Check MARC Using Rules File”

# Using MARC Validator

- ❖ We sent item barcodes back to the library so they could investigate and correct errors for the bibs
- ❖ We asked them to split future files up by TLC's "item type" to make finding errors easier
- ❖ We also tested using "Remove invalid records"



# Finalizing MARC files


SOA_SOYAVG.MRC
SOA_SOYAREF.MRC
SOA_SOYAPB.MRC
SOA_SOYANF.MRC
SOA_SOYAG.MRC
SOA_SOYAF.MRC
SOA_SOYAB.MRC
SOA_SOYAAUDCD.MRC
SOA_SOSS.MRC
SOA_SOSKIT.MRC
SOA_SOSF.MRC
SOA_SOREF.MRC
SOA_SOPB.MRC
SOA_SOOVNF.MRC
SOA_SONJR.MRC
SOA_SONJNF.MRC
SOA_SONF.MRC
SOA_SOMYS.MRC
SOA_SOLPF.MRC
SOA_SOJPMRC
SOA_SOJNF.MRC
SOA_SOJGN.MRC
SOA_SOJG.MRC
SOA_SOJF.MRC
SOA_SOJEF.MRC

```
MarcEditor: TEST(1).mkr
File Edit Fonts Reports Tools OCLC WorldCat Plug-ins Help
- LDR 01126nas 22002654 4500
-001 \W0001372Z
-003 P WmBRO
-005 20230712142558.0
-008 151111d2015999nyuarl|||||0uuu0engld
-020 \S9780894874857
-020 \S9780894875779
-035 \S0001372Z
-039 \S9428cTLC
-245 00$Scott's catalogue of United States stamps & covers, specialized.
-246 \S$Specialized catalogue of United States stamps and covers
-260 01$New York,$B$Scott Publications, Inc.
-300 \S$w. 1178pg
-500 \S$Including postage, air post, plate blocks, first day covers, postal stationery, essays, proofs, computer vended postage, 19th Century carriers and locals, booklets, revenue stamps, telegraph stamps, confederate states, U.S. possessions, United Nations.
-710 20$Scott Publications, Inc.
-780 00$Catalogue of United States stamps, specialized
-785 00$Scott's specialized catalogue of United States stamps
-936 \S$A$E
-949 \S$SOREF$B$REF$c383 SC0$g39507001972537$h2020$p134.99
-949 1\S$SONF$c383 SCO

- LDR 01417nam 22003974a 4500
-001 21351454
-005 20230712160905.0
-008 200728z2020\|nyu|||d|||||0001|engll
-906 \S78cbcb$congnew$d1$e$ccp$920$g$y$catlg
-925 0\S$aacquire$b1 shelf copy$xpolicy default
-955 \S$b$K05 2020-01-03$ix$K05 2020-01-03 (telework) to CIP
-010 \S$a 2019059176
-020 \S97812501961498q(hardcover)
-020 \S97812501961566q(ebook)
-039 \S$a05973cTLC
-040 \S$aDLC$bengSerda$cDLC
-042 \S$apcc$alcaec
-050 00$aPZ7.1.B3737$bGir 2020
-082 00$a|Ficj$223
-100 1\S$aBashardoust, Melissa,$eauthor.
-245 1\S$aGiri, serpent, thorn /$cMelissa Bashardoust
-250 \S$aFirst edition.
-263 \S$a2005
-264 1\S$aNew York, NY :$bFlatiron Books,$c2020.
-300 \S$a322 p. :$c25 cm
-336 \S$atext$b$bt$2rdacontent
-337 \S$aunmediated$b$bn$2rdamedia
-338 \S$avolume$b$nc$2rdacamer
-520 \S$aSoraya, a princess cursed to be poisonous to the touch, has lived eighteen years in the shadows but as her twin brother's wedding approaches, she faces choices with unimaginable consequences.
-650 1\S$aFantasy.
-650 1\S$aPrincesses$vFiction.
-650 1\S$aBlessing and cursing$vFiction.
-650 1\S$aPoison$vFiction.
-650 1\S$aBrothers and sisters$vFiction.
-650 1\S$aToxicology.
-949 1\S$aSOYAF$cYA.BAS$g39507001980779$p18.99

- LDR 03678nam 22003974a 4500
-001 19429nFR
```

# Mapping item record properties

- ❖ We used the data in the MARC files and worked with library staff to determine which fields represented which parts of the item record so we could translate that to Polaris
  - ❖ We created a spreadsheet to map everything out and shared it with the library
  - ❖ Each column header was a subfield from the 949 field in the MARC file which represented a field from the item record in TLC, each of which we paired with its corresponding part of the item record in Polaris
  - ❖ Each row was an “item type” from TLC
  - ❖ We filled in codes and descriptions for each cell from Polaris
- 



# Mapping item record properties

**\*=Required** bulk change after import

SORA Info	a - Material type*	d - Collection*	e - Shelf location	f - Loan period*	k - Fine code*	l - Renewal limit*	m - Stat code	n - Holdable	Pickup at branch	Patrons from this library and branches	Patrons from this branch only	o - Non-circulating	r - Circulation Status	t - Assigned Branch	u - Owning Branch
SOABR	2 - Paperback	2 - Adult Non-Fiction	3 - ESL	10 - 28 days	6 - \$0.15 / \$10	3	155 - ESL	1				0	16	240	240
SOBIO	1 - Hardcover	2 - Adult Non-Fiction		10 - 28 days	6 - \$0.15 / \$10	3	140 - Biography	1				0	16	240	240
SOBOCD	5 - Audiobook	3 - Adult Media		10 - 28 days	15 - \$0.50 / \$10	3		1				0	16	240	240
SOBS14	1 - Hardcover	1 - Adult Fiction	8 - Local Pickup	8 - 14 days	6 - \$0.15 / \$10	1		1	Y	Y		0	16	240	240
SOBS3	9 - DVD	3 - Adult Media	8 - Local Pickup	3 - 3 days	15 - \$0.50 / \$10	1		1	Y	Y		0	16	240	240
SOBS7	1 - Hardcover	1 - Adult Fiction	8 - Local Pickup	7 - 7 days	6 - \$0.15 / \$10	1		1	Y	Y		0	16	240	240
SOC D	6 - Music	3 - Adult Media		8 - 14 days	15 - \$0.50 / \$10	3		1				0	16	240	240
SOC PD	11 - Software	3 - Adult Media		10 - 28 days	15 - \$0.50 / \$10	3		1				0	16	240	240
SODAB	NOT COMING OVER							1				0	16	240	240
SODVD	9 - DVD	3 - Adult Media		8 - 14 days	15 - \$0.50 / \$10	3		1				0	16	240	240
SODVDTV	9 - DVD	3 - Adult Media		8 - 14 days	15 - \$0.50 / \$10	3	193 - TV Series	1				0	16	240	240
SOED	12 - Equipment	3 - Adult Media		8 - 14 days	27 - \$5 / \$20	1		1				0	16	240	240
SOEVC	NOT COMING OVER							1				0	16	240	240
SOFIC	1 - Hardcover	1 - Adult Fiction		10 - 28 days	6 - \$0.15 / \$10	3		1				0	16	240	240
SOFL	1 - Hardcover	2 - Adult Non-Fiction	4 - World	10 - 28 days	6 - \$0.15 / \$10	3		1				0	16	240	240
SOG	19 - Graphic Novel	1 - Adult Fiction		10 - 28 days	6 - \$0.15 / \$10	3		1				0	16	240	240
SOGC	1 - Hardcover	2 - Adult Non-Fiction		10 - 28 days	6 - \$0.15 / \$10	3	287 - Environmental	1				0	16	240	240
SOILL	1 - Hardcover	1 - Adult Fiction		10 - 28 days	6 - \$0.15 / \$10	3		1				0	16	240	240
SOJB	25 - Juvenile Hardcover	6 - Juvenile Non-Fiction		10 - 28 days	29 - No Fine	3	140 - Biography	1				0	16	240	240
SOJBAG	NOT COMING OVER							1				0	16	240	240
SOJB CD	5 - Audiobook	7 - Juvenile Media		10 - 28 days	29 - No Fine	3		1				0	16	240	240
SOJB S7	NOT COMING OVER							1				0	16	240	240
SOJC DR	NOT COMING OVER							1				0	16	240	240
SOJDVD	9 - DVD	7 - Juvenile Media		8 - 14 days	29 - No Fine	3		1				0	16	240	240
SOJED	12 - Equipment	7 - Juvenile Media		8 - 14 days	29 - No Fine	1		1				0	16	240	240
SOJEF	21 - Early Reader	5 - Juvenile Fiction		10 - 28 days	29 - No Fine	3		1				0	16	240	240
SOJENF	21 - Early Reader	6 - Juvenile Non-Fiction		10 - 28 days	29 - No Fine	3		1				0	16	240	240
SOJF	25 - Juvenile Hardcover	5 - Juvenile Fiction		10 - 28 days	29 - No Fine	3		1				0	16	240	240
SOJFL	26 - Juvenile Paperback	6 - Juvenile Non-Fiction	4 - World	10 - 28 days	29 - No Fine	3		1				0	16	240	240
SOJG	21 - Early Reader	5 - Juvenile Fiction		10 - 28 days	29 - No Fine	3		1				0	16	240	240
SOJGC	25 - Juvenile Hardcover	6 - Juvenile Non-Fiction		10 - 28 days	29 - No Fine	3	287 - Environmental	1				0	16	240	240

# Setting up MarcEdit task file

- ❖ Once we had the item properties mapped out we had to create a task file in MarcEdit that could convert TLC info to Polaris info
- ❖ We changed the TLC “item types” in 949 subfield \$a to include not only the Polaris Material Type, but any other relevant aspects of the item record that weren’t already contained in their own subfield, such as Loan period, Fine code, Renewal limit, etc.
- ❖ Example: SOABR □ 2\$d2\$e3\$f10\$k6\$l3\$m155\$n1\$o0\$r16



# Setting up MarcEdit task file

MarcEdit.NET Batch Editing Tools

**Edit Subfield Utility**

Field:  Subfield:  Field Data:

Replace with:

Search Options:

New subfield only  Match case

Add subfield if not present  Move subfield data

Delete Subfield  Use regular expression

Delete Duplicate Subfield

Buttons: Replace Text, Remove Text, Close

Edit Task List

Task List Name:

Description:

Tasks:

SUBFIELD_EDIT	949	a	SOABR	2\$d2\$e3\$f10\$k6\$13\$m155\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOBIO	1\$d2\$f10\$k6\$13\$m140\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOBOCD	5\$d3\$f10\$k15\$13\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOBS14	1\$d1\$e8\$f8\$k6\$1\$1\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOBS3	9\$d3\$e8\$f3\$k15\$11\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOBS7	1\$d1\$e8\$f7\$k6\$1\$1\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOCDD	6\$d3\$f8\$k15\$13\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOCPCD	11\$d3\$f10\$k15\$13\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SODVDTV	9\$d3\$f8\$k15\$13\$m193\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SODVD	9\$d3\$f8\$k15\$13\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOED	12\$d3\$f8\$k27\$11\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOFIC	1\$d1\$f10\$k6\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOFL	1\$d2\$e4\$f10\$k6\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOGC	1\$d2\$f10\$k6\$13\$m287\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOG	19\$d1\$f10\$k6\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOILL	1\$d1\$f10\$k6\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJB	5\$d7\$f10\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJB	25\$d6\$f10\$k29\$13\$m140\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJDVD	9\$d7\$f8\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJED	12\$d7\$f8\$k29\$11\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJEF	21\$d5\$f10\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJENF	21\$d6\$f10\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJFL	26\$d6\$e4\$f10\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJF	25\$d5\$f10\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJGC	25\$d6\$f10\$k29\$13\$m287\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJGN	19\$d5\$f10\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJG	21\$d5\$f10\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJKIT	7\$d7\$f10\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJMP3	18\$d7\$f10\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJNF	25\$d6\$f10\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJPB	26\$d5\$f10\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJPER	3\$d8\$f8\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJPP	20\$d5\$f10\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJP	20\$d5\$f10\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJREF	8\$d16\$f10\$k29\$10\$m0\$0\$1\$16	0 0
SUBFIELD_EDIT	949	a	SOJSTG	25\$d5\$f10\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOLPB	23\$d2\$f10\$k6\$13\$m140\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOKIT	7\$d3\$f10\$k15\$13\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOJVXX	18\$d7\$f10\$k29\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOLPF	23\$d1\$f10\$k6\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOLPNF	23\$d2\$f10\$k6\$13\$m1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOMP3CD	5\$d3\$f10\$15\$13\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOMP3	18\$d3\$f10\$k15\$13\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOMP	29\$d3\$f7\$k27\$11\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SOMYS	1\$d1\$f10\$k6\$13\$m57\$n1\$00\$r16	0 0
SUBFIELD_EDIT	949	a	SONF	1\$d2\$f10\$k6\$13\$m1\$00\$r16	0 0

# Creating the Import profile

Modify Import Profile - SORA Import

Profile Setup | Bibliographic Records | Item Records | Authority Records | Record Sets

When Saving Bibliographic Records as Final

Build item records

- Using embedded holdings fields only
- Using template/system default values only
- Using all available holdings/item fields

If a duplicate item record (barcode) is found:

- Save duplicate item record as provisional
- Do not save duplicate item record

If no item record (barcode) is found:

- Save item record as final
- Save item record as provisional
- Do not save item record

Display in PAC (when not explicitly found)

Item template (for fields that are missing):

SORA blank template (BCCLS - Office and Test Branch)

Update items (enriched EDI)

If an update error is encountered:

- Save item record as provisional
- Do not save item record

Embedded holdings field/MARC subfield mapping

Holdings tag number: 949

Assigned Branch:	t	Loanable Outside System:	<input type="checkbox"/>
Assigned Collection:	d	Material Type:	a
Barcode:	g	Name Of Piece:	<input type="checkbox"/>
Call Number Prefix:	b	Non Circulating:	o
Call Number Suffix:	j	Non Public Note:	s
Circulation Status:	r	Owning Branch:	u
Classification Number:	c	Physical Condition:	q
Copy Number:		POLI-Segment ID:	<input type="checkbox"/>
Cutter Number:	h	Price:	p
Display In PAC:	<input type="checkbox"/>	Public Note:	<input type="checkbox"/>
Fine Code:	k	Renewal Limit:	l
Free Text Block:	7	Shelf Location:	e
Funding Source:	<input type="checkbox"/>	Shelving Scheme:	<input type="checkbox"/>
Holdable:	n	Statistical Code:	m
Library Assigned Block:	<input type="checkbox"/>	Temporary Shelf Location:	<input type="checkbox"/>
Loan Period Code:	f	Volume Number:	i

Save Close Help

❖ Once we ran the MarcEdit task to convert all the 949 fields to be Polaris-ready, we set up the Polaris import file to assign those field to the item correctly

❖ We imported all the bib. records as final and decided to clean up any duplicates later (which we're still working on)

# Using Record Sets

- ❖ Since we imported bib. records for each TLC “item type” separately, we were able to use record sets to keep items separate

Item Record Set

Final

Save to new record set       Save to existing record set

Name:       Find       Append  
 Replace

Owner:

Cataloging Record Sets - Name Find Tool:2

File Edit Tools Options Help

General Settings Scoping Branches Collections Databases

Object: Record Sets Limit by: (None)

Search by: Name Value:

Type: Exact match (implicitly truncated)

Sort by: (None)

For: sora

Search Mode  
 Normal  
 Power  
 SQL

Count Only

Search Stop New Search Clear Help

Name	Record Type	Owner	Tota...	Creation Date	Note	Record...
SORA SOBIO	Item Record	South Ora...	1702	9/26/2023		Final ...
SORA SOBODC	Item Record	South Ora...	785	9/26/2023		Final ...
SORA SOJBDC	Item Record	South Ora...	3	9/26/2023		Final ...
SORA SOABR	Item Record	South Ora...	170	9/26/2023		Final ...
SORA SOKIT	Item Record	South Ora...	87	9/26/2023		Final ...
SORA SOCD	Item Record	South Ora...	9	9/26/2023		Final ...
SORA SONF	Item Record	South Ora...	5688	9/26/2023		Final ...
SORA SOREF	Item Record	South Ora...	791	9/26/2023		Final ...
SORA SOJDVD	Item Record	South Ora...	83	9/26/2023		Final ...
SORA SOB57	Item Record	South Ora...	969	10/4/2023		Final ...
SORA SOMYS	Item Record	South Ora...	1933	10/4/2023		Final ...
SORA SOB514	Item Record	South Ora...	272	10/5/2023		Final ...
SORA SOYAF	Item Record	South Ora...	2487	10/5/2023		Final ...
SORA SOJGN	Item Record	South Ora...	1039	10/5/2023		Final ...
SORA SOED	Item Record	South Ora...	15	10/6/2023		Final ...
SORA SOFIC	Item Record	South Ora...	7391	10/6/2023		Final ...
SORA SOYAPB	Item Record	South Ora...	167	10/6/2023		Final ...
SORA SOJP	Item Record	South Ora...	5987	10/6/2023		Final ...
SORA SOJF	Item Record	South Ora...	3508	10/6/2023		Final ...
SORA SOPB	Item Record	South Ora...	100	10/6/2023		Final ...
SORA SOLPF	Item Record	South Ora...	945	10/6/2023		Final ...
SORA SODVDTV	Item Record	South Ora...	229	10/6/2023		Final ...
SORA SOFL	Item Record	South Ora...	6	10/6/2023		Final ...



# Using Record Sets

The screenshot shows the Polaris Record Set interface for 'SORA SOBIO'. The window title is 'Record Set 131987 - Polaris'. The menu bar includes File, Edit, View, Tools, and Help. The toolbar contains various icons for file operations. The main area displays the record set details: Name: SORA SOBIO, Owner: South Orange (lib), Record type: Item, Note: (empty), Number of records: 1702, and Record status: Final. Below this is a table of records with columns: Title, Assign..., Collec..., Materi..., Shelf..., Call N..., Vol..., Status, Barcode, Last Activity..., R..., and Contro... The table lists 20 records, each with a title, assignment, collection, material type, shelfmark, call number, volume, status, barcode, last activity, and control number. A vertical sidebar on the left is labeled 'Item Record Set'. At the bottom, it says 'For Help, press F1' and '250 of 1702 record(s) retrieved'.

Title	Assign...	Collec...	Materi...	Shelf...	Call N...	Vol...	Status	Barcode	Last Activity ...	R...	Contro...
32 yolks : from my m...	South ...	Adult ...	Hardc...		B RIP		Avai...	39507001825925		F...	11383...
Abraham Lincoln.	South ...	Adult ...	Hardc...		B LIN		Avai...	39507000305317		F...	11383...
Abraham Lincoln	South ...	Adult ...	Hardc...		B-LIN ...		Avai...	39507001221919		F...	11383...
Acceptance : a memoir	South ...	Adult ...	Hardc...		B NIE		Avai...	39507002052115		F...	11383...
Alexander I: Tsar of...	South ...	Adult ...	Hardc...		B ALE		Avai...	39507000290402		F...	11384...
All about me! : my r...	South ...	Adult ...	Hardc...		B BRO		Avai...	39507002032364		F...	11383...
Also a poet : Frank ...	South ...	Adult ...	Hardc...		B CAL		Avai...	39507002055282		F...	11384...
American Eve : Evel...	South ...	Adult ...	Hardc...		B NES...		Avai...	39507001431310		F...	11383...
American scoundrel ...	South ...	Adult ...	Hardc...		B SIC ...		Avai...	39507001130706		F...	11383...
Ansel Adams, an aut...	South ...	Adult ...	Hardc...		B ADA		Avai...	39507000290089		F...	11384...
The answer to the ri...	South ...	Adult ...	Hardc...		B MAC		Avai...	39507001702975		F...	11383...
Apple : skin to the c...	South ...	Adult ...	Hardc...		B GAN		Avai...	39507001992220		F...	11383...
Audubon : the makin...	South ...	Adult ...	Hardc...		B AUD...		Avai...	39507001280634		F...	11384...
Ava Gardner : love i...	South ...	Adult ...	Hardc...		B GAR...		Avai...	39507001324762		F...	11383...
The battle for Room ...	South ...	Adult ...	Hardc...		B BOL		Avai...	39507001813236		F...	11383...
The beautiful ones	South ...	Adult ...	Hardc...		B PRI		Avai...	39507001971570		F...	11383...

- ❖ Using record sets helped to easily sort items and see if there were any mistakes
- ❖ The record sets ownership was set to the library so they could make further edits as needed

# Importing patron records

# Importing patron records

- ❖ We used the Polaris “Importing Student Records Guide 7.3” to do this
- ❖ Supportal > Documentation and Downloads > Documentation Portal (New) > Polaris > Documentation for 7.3

https://documentation.iii.com/product-documentation/polaris.php

OverDrive MyBCCLS Gmail Asana Zendesk BCCLS Reports SimplyReports Mandrill Leap

Documentation for 7.3

- What's New in Polaris and Leap 7.3
- Leap Help 7.3
- Polaris Staff Client Help 7.3
- Polaris API Reference Guide 7.3
- Polaris API Reference Guide 7.3 (PDF)
- PowerPAC 7.3
- Simply Reports 7.3
- Administration Guide 7.3
- Acquisitions Administration Guide 7.3
- Acquisitions Guide 7.3
- Automated Acquisitions Guide 7.3
- Cataloging Administration Guide 7.3
- Cataloging Guide 7.3
- Community Profiles Guide 7.3
- ExpressCheck Guide 7.3
- Polaris Fusion Guide 7.3
- Importing Student Records Guide 7.3
- Installation Guide 7.3



# Importing patron records

polaris

Importing Student Records as Patron  
Records

Polaris 7.3

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# Obtaining patron records

- ❖ The library exported a set of test patrons (library staff) from TLC
- ❖ It turned out two Excel files were needed to encompass all the data needed for the import
- ❖ We combined the two files into one (not as easy as it sounds)
- ❖ Then we did a test import of those users before working on the full set of patron files in production



# Obtaining patron records

- ❖ One test file contained patrons' notification preferences
- ❖ The other file contained the rest of the info
- ❖ The names didn't all match



# Obtaining patron records



# Obtaining patron records

16 Attachments • Scanned by Gmail

X Code 3 Borrowers...

X Code 2 Borrowers...

X Code 3 Borrowers...

X Code 4 Borrower...

X Code 2 Borrowers...

X Code 4 Borrower...

X Code 5 Borrowers...

X Code 5 Borrowers...

X Code 6 Borrowers...

X Code 6 Borrowers...

X Code 8 Borrowers...

X Code 8 Borrowers...

X Code 9 Borrowers...

X Code 9 Borrowers...

X Code 10 Borrower...

X Code 10 Borrower...

# Determining Patron Codes

Code 1: Adult cardholders  
Code 2: Children's  
Code 3: One-year temporary adult  
Code 4: Teacher  
Code 5: Paid  
Code 6: Board  
Code 7: Staff  
Code 8: ReBL  
Code 9: One year temporary child/teen  
Code 10: Teen



Polaris Patron Code: Adult  
Polaris Patron Code: Juvenile  
Polaris Patron Code: Courtesy  
Polaris Patron Code: Institution  
Polaris Patron Code: Pay  
Polaris Patron Code: Adult  
Polaris Patron Code: Library Staff  
Polaris Patron Code: Adult/ReBL  
Polaris Patron Code: Courtesy  
Polaris Patron Code: Young Adult

- ❖ Some ReBL libraries are in BCCLS and some are not
- ❖ Some Courtesy/Pay patrons already had BCCLS cards

# Setting up required fields

- ❖ These are the required fields from the “Importing Student Records Guide 7.3”
- ❖ Each needs to have its own column in Excel

## Patron Content

Each row represents a single, implicitly structured data item (a patron). Insert a CR (ASCII character 13) at the end of each row to indicate the end of that patron's data. Many patrons may be included in the patron file. The row takes this form:

```
<record code>|<creation date>|<Name Last>|<Name First>|<Name Middle>|<Name Title>|<Name Suffix>|<Patron Code ID>|<Patron Branch ID>|<Patron Barcode>|<Expiration Date>|<Patron Statistical Code ID>|<Gender ID (1, 2, 3)>|<Password>|<Language ID>|<Registration Date>|<Birth Date>|<Permission (currently is not being used)>|<Maintain Reading List (1, 0)>|<Former ID>|<User Defined Field 1>|<User Defined Field 2>|<User Defined Field 3>|<User Defined Field 4>|<User Defined Field 5>|<Do Not Delete (1, 0)>|<Exclude From Bills (1, 0)>|<Exclude From Collection (1, 0)>|<Exclude From Holds (1, 0)>|<Exclude From Overdue Notice (1, 0)>|<Use Plain Text E-mail (1, 0)>|~<Address Label>|<Address Type>|<Street One>|<Street Two>|<Street Three>|<City>|<State>|<Postal Code>|<Zip Code Plus Four>|<County>|<Country ID>|<Address Check Date>|<E-mail Address>|<Alternative E-mail Address>|<Phone 1>|<Phone1CarrierID>|<Phone 2>|<Phone2CarrierID>|<Phone 3>|<Phone3CarrierID>|<Fax Number>|< Delivery Option ID>|<PatronRecordID>|<EnableSMS>|<eReceiptOptionID>|<TxtPhoneNumber>|<Exclude from Almost Overdue / Auto Renew (1, 0)>|<Exclude from Patron Record Expiration (1, 0)>|<Exclude from Inactive Patron (1, 0)>|<Obfuscated Password>|<Password Hash>|<Patrons Last Name on ID>|<Patrons First Name on ID>|<Patrons Middle Name on ID>|<Use Name on ID for Notices (1, 0)>
```

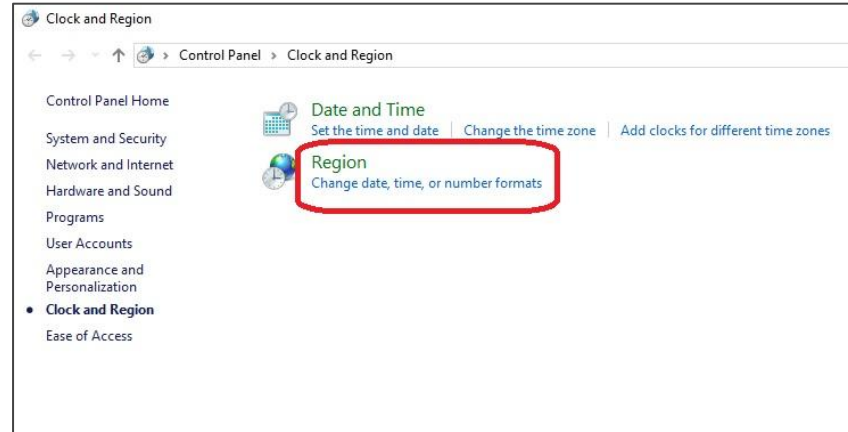
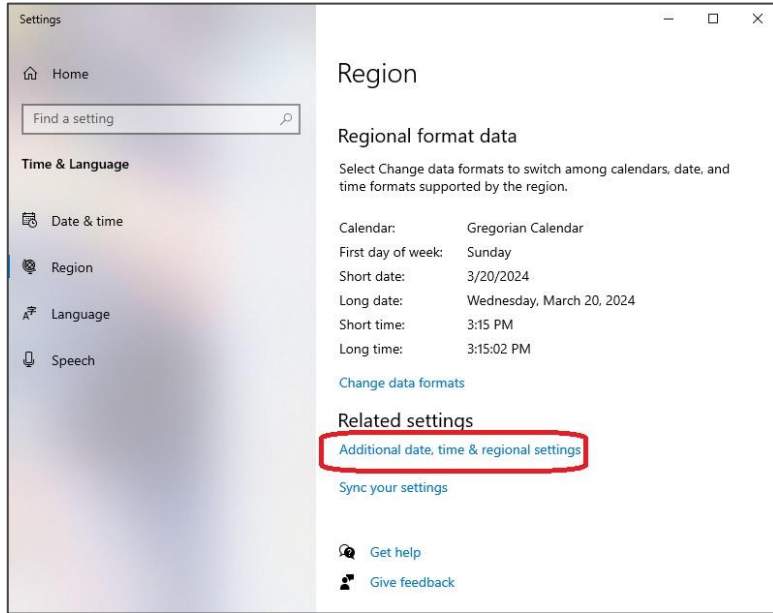
See "Data Dictionary" on page 6.

# Setting up required fields

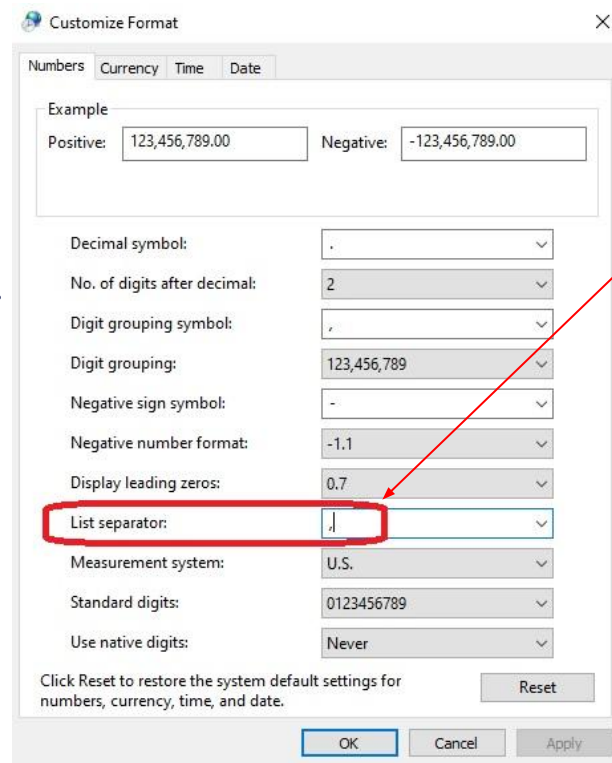
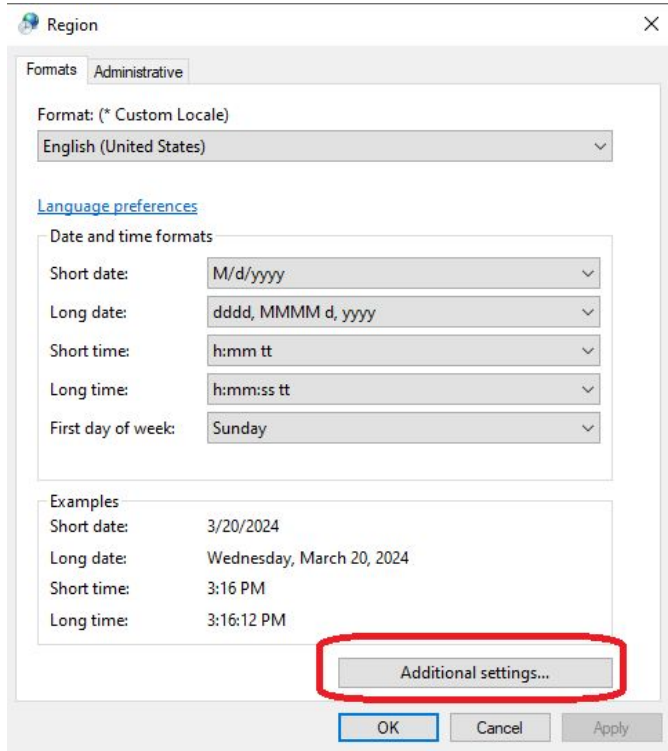




# Setting up .trn file





# Setting up .trn file



Replace the comma in “List separator” with a pipe “|”

# Setting up .trn file

- ❖ Once we changed our regional settings we saved the file as .csv using the naming convention in the guide
- ❖ Then we edited the file name and changed .csv to .trn
- ❖ Next we opened the .trn file and added the required header from the guide

Name	Date modified	Type	Size
 PTF_202308030639_MARGARET-10.csv	8/4/2023 10:52 AM	Microsoft Excel C...	21 KB
 PTF_20230926090400_MARGARET-10.trn	9/26/2023 9:04 PM	TRN File	1 KB

## TRN File Format

The upload file must be a pipe-delimited text file in the form specified below. The encoding can be ANSI, Unicode, or UTF-8.

### File Name

The file name must be in the format:

**PTF\_<YYYY><MM><DD><HH><MI>\_<WorkstationName>.TRN**

Where:

<YYYY> is the four digit year

<MM> is the two digit month

<DD> is the two digit date

<HH> is the two digit hour

<MI> is the two digit minute

<SS> is the two digit second

<WorkstationName> is the network computer name of a valid Polaris staff client workstation

### File Header

The file begins with a one-line header in this form:

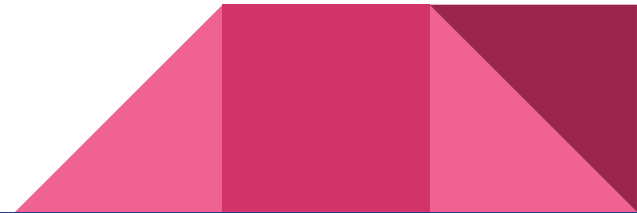
**1 | <time> | <date> | <branchID> | <userID> | <workstationID> | 20**

Where:

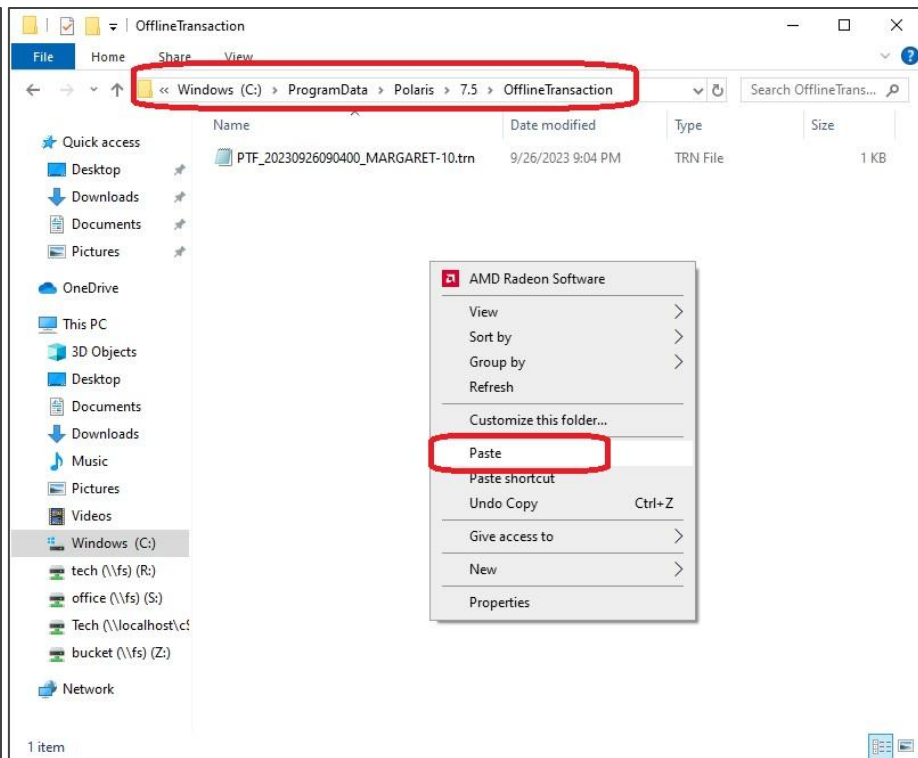
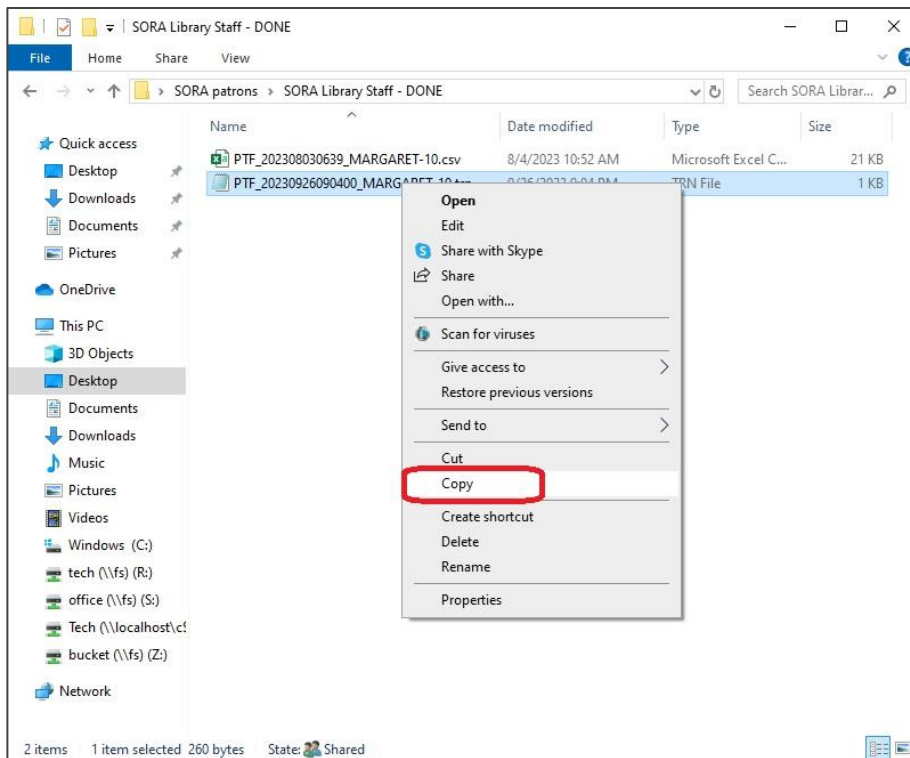
<time> is in the form **HH:MM:SS**

<date> is in the form **<MM>/<DD>/<YYYY>**

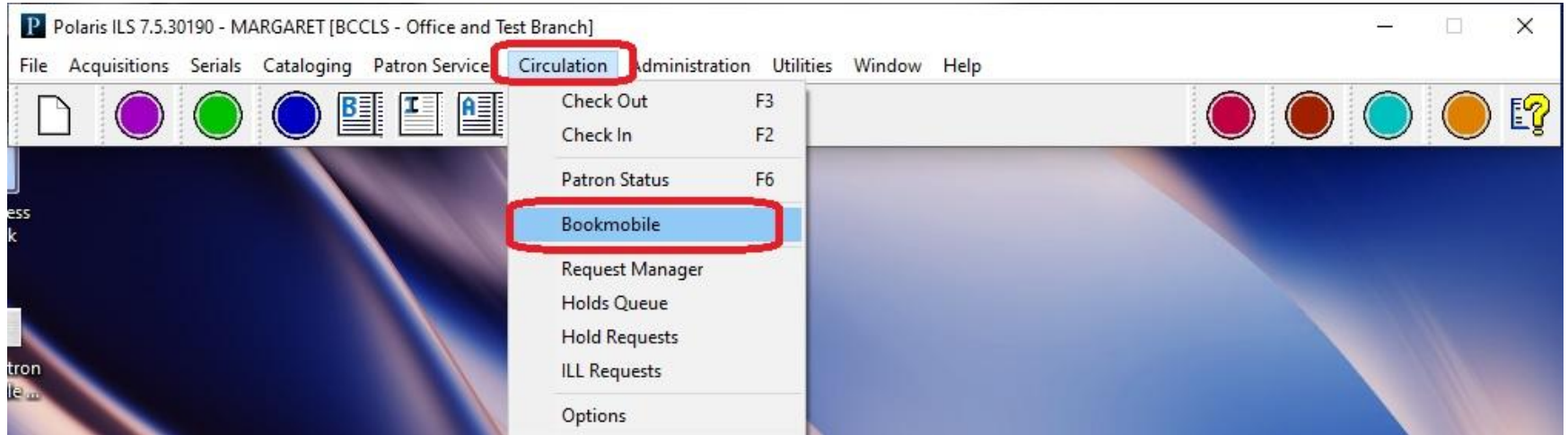
# Setting up .trn file



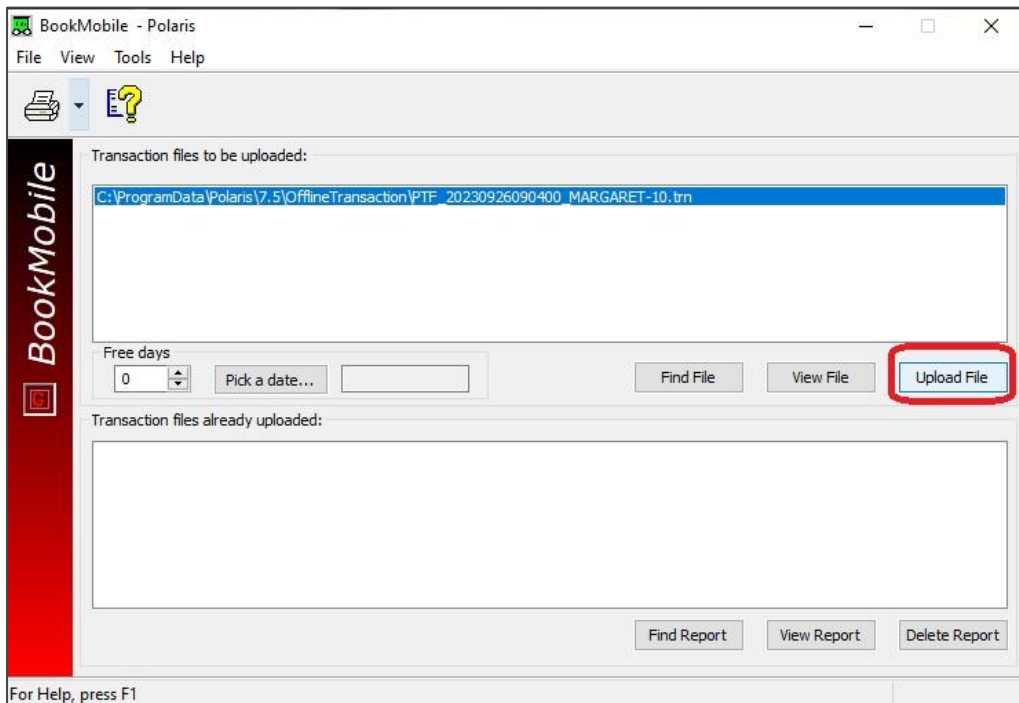
# Importing patron records



# Importing patron records



# Importing patron records



- Click **stop on errors** if you want the file upload process to stop for any file in which Polaris finds an error. When errors are found, a message indicates why the file is not being uploaded.
- Click **continue and get error report in the end** if you want Polaris to complete the file upload process and then compile an error report.

Click **Upload File** to upload the selected file.

- The file is transferred to the **Transaction files already uploaded** list with a .log extension. (To view a log file, select the file in the **Transaction files already uploaded** list, and click **View report**.)
- The system **automatically assigns block 512** Offline Registration – address verification required) to every record created through the Bookmobile or Offline file importer.

# Importing patron records

Patron Services Record Sets - Name Find Tool

File Edit Tools Options Help

General Settings

Object: Record Sets Limit by: (None) Search Mode:  Normal  Power  SQL

Search by: Name Value: Search

Type: Exact match (implicitly truncated) Stop

Sort by: (None) Count Only New Search

For: sora Clear

Help

Name	Record Type	Owner	Tota...	Creation Date	Note
SORA Adult Patrons	Patron	South Ora...	6253	10/5/2023	
SORA Library Staff Patrons	Patron	South Ora...	23	10/5/2023	
SORA BCCLS Library Patrons	Patron	South Ora...	3	10/5/2023	
SORA ReBL Patrons	Patron	South Ora...	4	10/6/2023	
SORA Institution Patrons	Patron	South Ora...	53	10/6/2023	
SORA Courtesy Patrons	Patron	South Ora...	218	10/6/2023	
SORA Pay Patrons	Patron	South Ora...	1	10/6/2023	
SORA Juvenile Patrons	Patron	South Ora...	1745	10/8/2023	
SORA Young Adult Patrons	Patron	South Ora...	370	10/8/2023	

Done Stay on Select 17 of 17 record(s) retri

- ❖ We did a search for all the library's patrons and made record sets for each patron code so they could do any further cleanup



# Closing Summary

# 3 Useful Takeaways

1. There are pros and cons to doing this:
  - You save a lot of money, but it takes a lot of work
  - You need familiarity with Polaris ILS, but we proved it is possible
  - You can do it on your schedule
2. Think about the possibilities of doing **other** things on your own in the ILS
3. Now that we did the work, you can follow our steps and try our process





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## THANK YOU

Questions?

# Steps

## ❖ Adding a library/branch in Polaris

- Creating the library
- Copying over library tables
- Creating the branch
- Copying over branch tables

## ❖ Importing bib. and item records

- Obtaining MARC files
- Using MARC Validator
- Finalizing MARC files
- Mapping item record properties
- Setting up MarcEdit task file
- Creating the Import profile
- Using Record Sets

## ❖ Importing patron records

- Obtaining patron records
- Determining Patron Codes
- Setting up required fields
- Setting up .trn file
- Importing patron records

