

How DARE She Retire!

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SHARE Manager of Administrative Services



#IUG2019



Sunday, May 5th | Pre-Conference

Monday, May 6th – Wednesday, May 8th | Main Conference

RETIRED?

She who shall not be named-- the heart
(and soul) of SHARE

She worked for the System for 35 years!



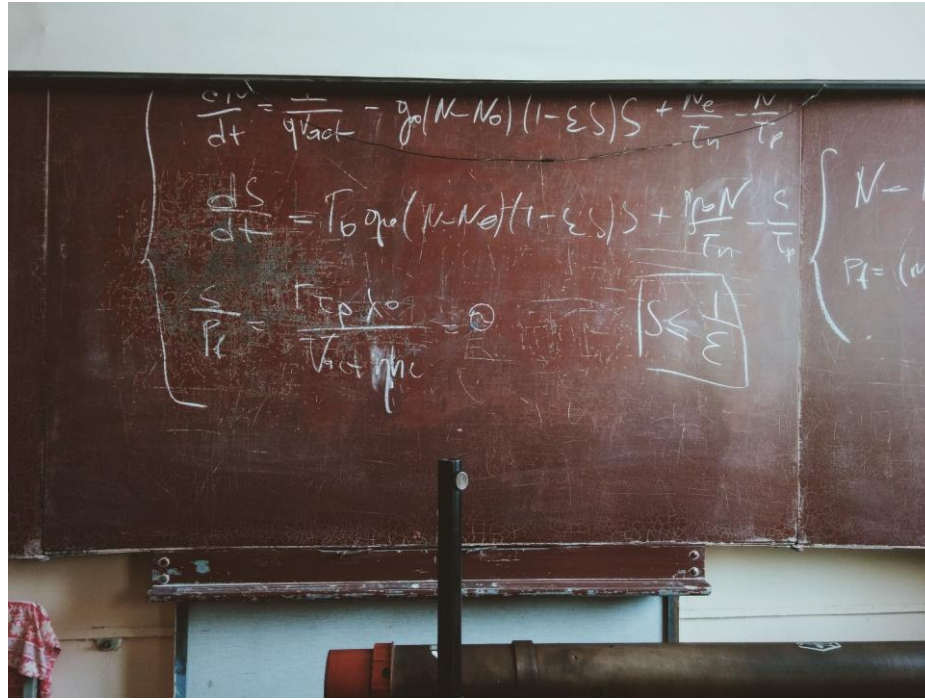
*Day we signed the
Polaris Contract!*

“If the software allows it to be either way and it doesn’t affect any other setting ...”

“If the software allows it to be either way and it doesn’t affect any other setting ...”

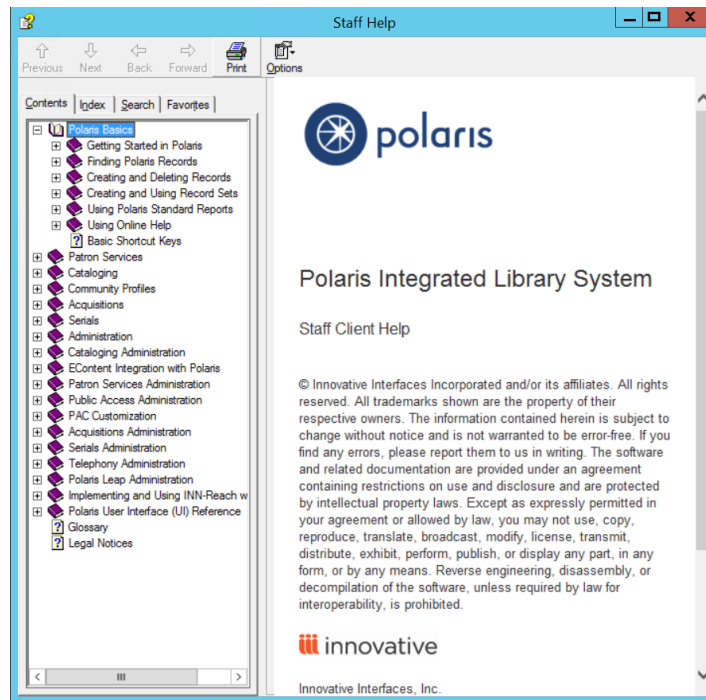
- Very Logical
- Great Customer service – really cared about libraries she served
- If she hesitated about something, WE SHOULD LISTEN!

HOW DO YOU LEARN?



HOW DO YOU LEARN?

- READ, READ, READ Polaris Help



HOW DO YOU LEARN?

Polaris Help Tips

- Favorites – if it took you a while to find something – save as a favorite

HOW DO YOU LEARN?

You are here: [Cataloging](#) > [Working With Multiple Cataloging Records](#) > [Using Cataloging Record Sets](#) > Bulk-Changing Item Records

Bulk-Changing Item Records

To make bulk changes to multiple item records at once, you can either gather the records in a record set and select **Tools, Bulk Change**, or you can select multiple items from anywhere in Polaris where items are displayed in a list, right-click and select the **Ad hoc Bulk Change** option. For example, you can select multiple items in the Find Tool results list, right-click and select **Ad hoc Bulk Change** to open the Item Record Bulk Change box.

Note:
For more information on using cataloging record sets, see [Using Cataloging Record Sets](#).

With either method, you can change the location, circulation information, bibliographic information, notes, and other information for multiple item records using the check boxes and free-text fields in the Bulk Change Item Record dialog box. When you are changing notes or other free-text fields, you can replace the text, add to the end of the text, or add to the beginning of the text.

Certain circulation statuses cannot be modified using bulk change because of the effects these changes might have in other records and processes. For example, you cannot use bulk change to change the circulation status of **Out to In** because some of the items might fill a hold request or be overdue. If an item with holds changed from **Out to In**, the patron record and the hold request record would need to be updated and notification sent. Any fines would need to be resolved and the item might need to go in-transit. In addition, in-transit slips, hold slips and fine receipts might need to be generated. The following table lists the circulation statuses that can be changed using bulk change.

From Circulation Status	To Circulation Status
Bindery	In
	In Repair
	Missing
	Unavailable
	Withdrawn
In	Bindery
	In Repair
	Missing
	Unavailable
	Withdrawn
In	Bindery
	In

HOW DO YOU LEARN?

Polaris Help Tips

- Favorites
- Administration setup vs. How-To

HOW DO YOU LEARN?

Contents | Index | Search | Favorites

- ⊕ Polaris Basics
- ⊕ Patron Services
- ⊕ Cataloging
- ⊕ Community Profiles
- ⊕ Acquisitions
- ⊖ **Serials**
 - ? Serials Workflow
 - ⊕ Serials Record Types
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 - ⊕ Setting Up Serials Records
 - ⊕ Managing Subscriptions
 - ⊕ Checking In Serials
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 - ⊕ Routing Serial Issues
 - ? Serials Shortcut Keys
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 - ⊕ EContent Integration with Polaris
 - ⊕ Patron Services Administration
 - ⊕ Public Access Administration
 - ⊕ PAC Customization
 - ⊕ Acquisitions Administration
 - ⊕ Serials Administration
 - ⊕ Telephony Administration
 - ⊕ Polaris Leap Administration
 - ⊕ Implementing and Using INN-Reach with Polaris
 - ⊕ Polaris User Interface (UI) Reference
- ? Glossary
- ? Legal Notices

HOW DO YOU LEARN?

Polaris Help Tips

- Favorites
- Administration setup vs. How-To
- Index vs. Search – two different ways if you don't know what Polaris calls it!!

HOW DO YOU LEARN?

Polaris Help Tips

- Favorites
- Administration setup vs. How-To
- Index vs. Search
- Glossary – especially if you don't know Cataloging!

HOW DO YOU LEARN?

Staff Help

Contents | Index | Search | Favorites

- Polaris Basics
- Patron Services
- Cataloging
- Community Profiles
- Acquisitions
- Serials
- Administration
 - Cataloging Administration
 - EContent Integration with Polaris
 - Patron Services Administration
 - Public Access Administration
 - PAC Customization
 - Acquisitions Administration
 - Serials Administration
 - Telephony Administration
 - Polaris Leap Administration
 - Implementing and Using INN-Reach with Polaris
 - Polaris User Interface (UI) Reference
 - Glossary**
 - Legal Notices

You are here: Glossary

Glossary

[006 field](#)

Fixed-length Data Elements -Additional Material Characteristics

This field contains 18 character positions (00-17) that provide for coding control number information about special aspects of the item being cataloged that cannot be coded in field 008 (Fixed-Length Data Elements). It is used in cases when an item has multiple characteristics. It is also used to record the coded serial aspects of nontextual continuing resources.

The field has a tree structure, whereby the code given in 006/00 (Form of material) determines the data elements defined for subsequent character positions. Except for code s (Serial/Integrating resource), the codes in field 006/00 correspond to those in Leader/06 (Type of record). For each occurrence of field 006, the codes defined for character positions 01-17 will be the same as those defined in the corresponding field 008, character positions 18-34. Configurations of field 006 are given in the following order: books, computer files/electronic resources, maps, music, continuing resources, visual materials, and mixed materials.

[007 field](#)

Physical Description Fixed Field

This field contains special information about the physical characteristics in a coded form. The information may represent the whole item or parts of an item such as accompanying material.

The data elements in field 007 are positionally defined and the number of character positions in field 007 depends upon the code contained in 007/00. Character position 00 contains a code that identifies the category of material. The fill character () is not allowed in this position. The fill character may be used in any other character position when the cataloging agency makes no attempt to code the position.

The categories of material for which field 007 is applicable in bibliographic records are presented in the following order in the field description: map, electronic resource, globe, tactile material, projected graphic, microform, nonprojected graphic, motion picture, kit, notated music, remote-sensing image, sound recording, text, videorecording, and unspecified.



HOW DO YOU LEARN?

Polaris Help Tips

- Favorites
- Administration setup vs. How-To
- Index vs. Search
- Glossary
- Own documentation

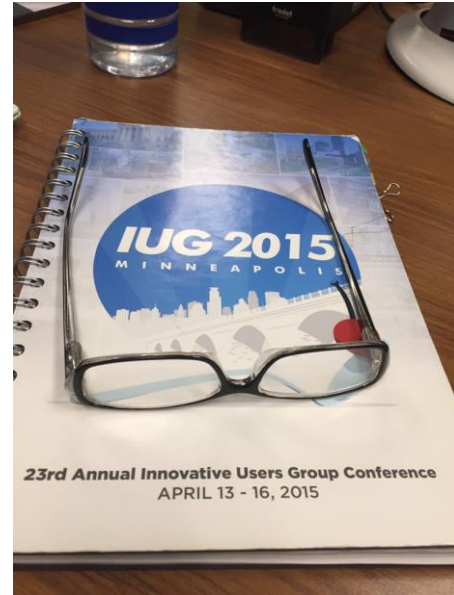
HOW DO YOU LEARN?

- READ, READ, READ Polaris Help
- Ask Questions



HOW DO YOU LEARN?

- READ, READ, READ Polaris Help
- Ask Questions
- Retain -- My notebooks



HOW DO YOU LEARN?

- READ, READ, READ Polaris Help
- Ask Questions
- Retain
- Develop a track changes



HOW DO YOU LEARN?



Polaris ILS
Live



Polaris ILS
TEST



Polaris ILS
TRAINING

- READ, READ, READ Polaris Help
- Ask Questions
- Retain
- Track Changes
- Training Database

HOW DO YOU LEARN?

- READ, READ, READ Polaris Help
- Ask Questions
- Retain
- Track Changes
- Training Database
- III Supportal / Knowledgebase

 innovative
CUSTOMER SUPPORTAL

Understanding Supportal Resources

The screenshot displays the 'Customer Supportal' interface for 'iii innovative'. At the top, the user 'Jesse' (jesse.jensen@iii.com) is logged in. The navigation bar includes 'HOME', 'KNOWLEDGEBASE', and 'COMMUNITIES', with a link to 'Ask the Community'. A search bar is prominently featured with the text 'Welcome Search for the answers to your questions.' and a search button. Below the search bar, there is an 'Announcements' section with a dropdown arrow. The user's profile for 'jesse.jensen@iii.com' is shown, including links for 'My Posts' and 'My Favorites'. The 'Supportal Resources' section contains four icons: a person for 'Contact Us', an open book for 'Supportal Guide', a clipboard for 'Support Policies', and a lightbulb for 'Supportal Roles'. A fifth lightbulb icon is labeled 'Communications'. On the right side, there are three panels: 'Latest Forum Questions' with a link to 'SCHEDULED MAINTENANCE ALERT: Phone System', 'Latest Solutions' with links to 'Polaris API Training videos' and 'Known Issues for Polaris 6.2', and 'Recent Activity' with a search icon and a list of search results including 'build report', 'supportal roles', 'reindex', 'change customer supportal password', and 'This is a test for Gall'.

Understanding Supportal Resources

Solutions



Downloads



Training Videos



Documentation



Understanding Supportal Resources

Solutions

- Contain knowledge compiled by your Support Team as they work through specific issues
- While solutions themselves may be individually focused on a specific issue, they cover a wide variety of topics overall



Understanding Supportal Resources

Solutions

- There are currently over 1600 Polaris-specific solutions in the knowledgebase
- They cover...

Polaris API eCommerce Mobile PAC
Upgrades Circulation
SIP Cataloging Notices Leap
Staff Client Database Administration PowerPAC
NCIP Acquisitions



Understanding Supportal Resources

Solutions

- There are currently over 1600 Polaris-specific solutions in the knowledgebase
- They cover...

AND MORE!

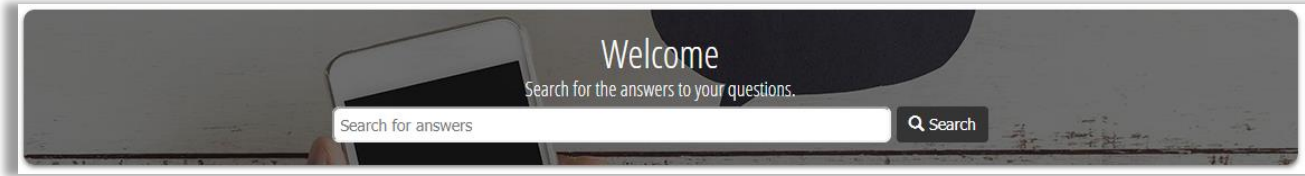


Understanding Supportal Resources

Solutions

- Different methods for locating solutions

1. Search

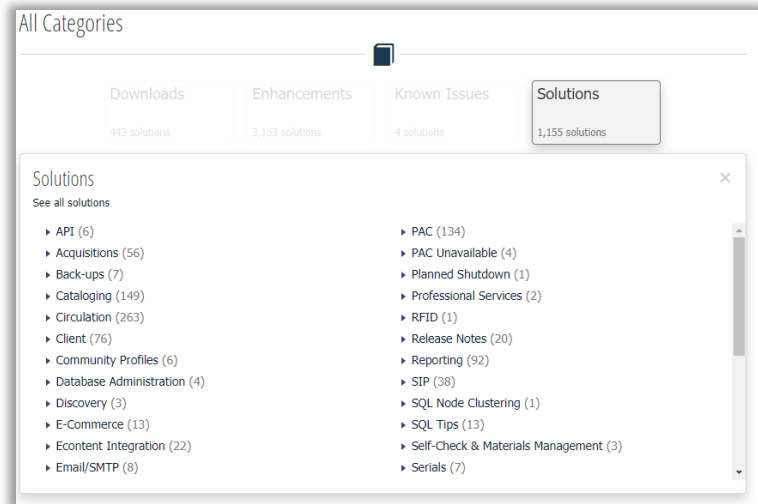


Understanding Supportal Resources

Solutions

- Different methods for locating solutions

2. Browse

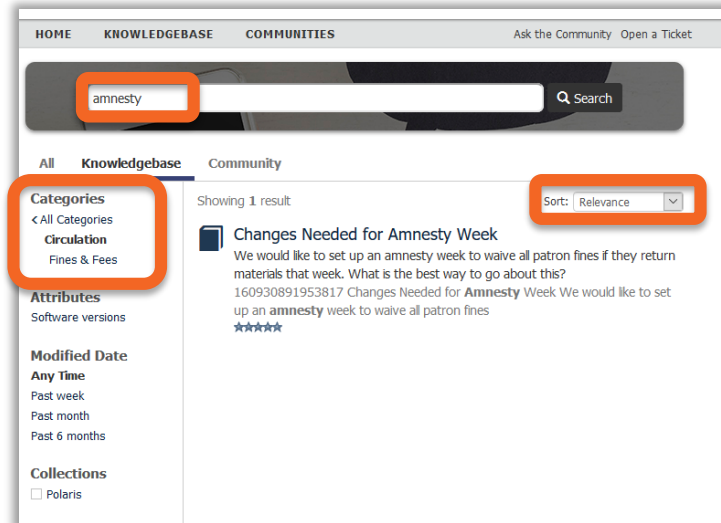


Understanding Supportal Resources

Solutions

- Different methods for locating solutions

3. Browse and then Search



Solution Searching Tip

- When searching, you can use keyword and browse searching together to narrow results.
- For example, to look a solution on fines amnesty
 - Click on Knowledgebase tab → Solutions → Circulation
 - Type Amnesty in the Search box.
 - Sort by Relevance

The screenshot shows a library knowledgebase search interface. At the top, there are navigation tabs for HOME, KNOWLEDGBASE, and COMMUNITIES, along with links for 'Ask the Community' and 'Open a Ticket'. A search bar contains the keyword 'amnesty' and a 'Search' button. Below the search bar, there are tabs for 'All', 'Knowledgebase', and 'Community', with 'Knowledgebase' selected. A 'Categories' sidebar on the left lists '< All Categories', 'Circulation', and 'Fines & Fees'. Below this are sections for 'Attributes' (Software versions), 'Modified Date' (Any Time, Past week, Past month, Past 6 months), and 'Collections' (Polaris). A 'Sort: Relevance' dropdown menu is visible on the right. The main content area shows 'Showing 1 result' for the article 'Changes Needed for Amnesty Week', which includes a description, a URL, and a five-star rating.

Solution Searching Tip

- When using the Search option...
 - Knowledgebase Suggestions and Community Suggestions are based on keywords
 - Search Suggestions based on searches by other users

The screenshot displays the Innovative Customer Supportal interface. At the top, the logo for 'innovative CUSTOMER SUPPORTAL' is visible, along with a user profile for 'Polaris' (polarisadmin@iil.com). The navigation bar includes 'HOME', 'KNOWLEDGEBASE', and 'COMMUNITIES'. A search bar is active with the text 'envisionware' entered. Below the search bar, a dropdown menu shows search suggestions:

- Search Suggestions
 - slp **envisionware**
 - envisionware** print
 - envisionware** self check
 - envisionware** ecommerce setup
- Knowledgebase Suggestions
 - enhancement: ability to have the patron change their phone number at the **envisionware** onestop and have it copy this information over to polaris
 - enhancement: ability to have patrons see a list of all items they have checked out in polaris and renew items if needed from the **envisionware** onestop
 - enhancement: **envisionware**'s branch manager integration
- Community Suggestions
 - does anyone have experience with **envisionware**'s 24-hour library?
 - is anyone using the "24-hour library, **envisionware**'s unique self-service library branch?" If you are could, you please share any information you have about it, the good, the bad and the ugly
 - donations using **envisionware** ecommerce

The right sidebar contains a 'Help Desk' section with links for 'Add New Ticket', 'Add New Service Commitment', 'My Open Tickets', 'My Closed Tickets', and 'Escalate Ticket'. Below that is a 'Contacts' section with 'Manage Contacts' and a 'Latest Forum Questions' section with 'SCHEDULED MAINTENANCE'.

Understanding Supportal Resources

Training Videos

- Compiled using the knowledge of our Product team
- Provide training on different areas of the Polaris ILS
- Two different types available:
 - How To
 - Feature-specific workflows
 - Informational
 - General topic overviews



Understanding Supportal Resources

Documentation

- Downloadable Excel, PDF, and Word files
- What's New
 - Provide details about new features and functionality included in the latest releases
- Topic / Product guides
 - Provide in depth information about specific areas within Polaris
 - Ex. Cataloging, Acquisitions, MyLibrary, etc.



More Resources

Log a ticket for
your Site Manager



Forums



Training



More Resources

Log a ticket for
your Site Manager



- We're here for you!
- Do you have a question about...
 - Product configuration?
 - Product functionality?
 - Product workflow?

More Resources

Forums



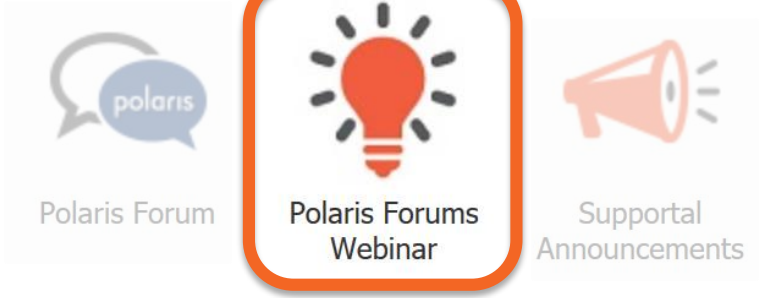
- Do you have a question about...
 - Library policy?
 - Third party products?
 - Customizations?

More Resources

Forums



For more information about the Forums and how they can work for you...



More Resources

Training



- Have you reviewed all of the documentation and watched all of the training videos?
- Our trainers offer training for a wide variety of topics

More Resources



- Core topics
 - Acquisitions
 - Cataloging
 - Serials
 - Patron Services
- Additional Topics
 - Outreach Services
 - SimplyReports
 - Etc.

TRAINING SERVICES FOR POLARIS LIBRARY PARTNERS

At Innovative, we understand the importance of training—when you join the Innovative family, when you upgrade to the latest versions of our software, and when you experience change in your library.

To ensure your staff is properly trained and can fully operate your Polaris solution, we offer a variety of training services—online or onsite—to help you navigate your system.

As Your Partner for Library Success, we're here to help you every step along the way. With our training services, an experienced Senior Library Training Consultant will engage your staff in a variety of ways:

innovative

ONLINE TRAINING

- Who: An individual library, up to ten attendees
- What: A demo style training experience conducted entirely online
- Where: Our virtual classroom offers training for staff in the same room, or separate locations
- Duration: Quoted in two hour increments, for a minimum of six hours

ONSITE TRAINING

- Who: An individual library, for all staff in need of training
- What: A demo style training experience, customized to your library's needs
- Where: Onsite at the location of your choice
- Duration: All training can be delivered onsite, but requires a minimum of two days of training

CORE TRAINING TOPICS

TOPIC	DURATION
Acquisitions	2 days
Cataloging	1.5 days
Circulation and Patron Registration (Patron Services)	1.5 days
Serials	1 day

Need refresher training on the core topics instead? We'll work with you to customize our standard agendas, and can cover topics in one-day increments or half-day sessions on specific topics, relevant to your library.

ADDITIONAL PRODUCT TRAINING

TOPIC	DURATION
Borrow-by- mail	2 hours
Community Records and Feature/It	2 hours
Configuring Floating Collections	2 hours
Course reserves	3 hours
Interlibrary Loan : LEAP/Client	1 hour
Introduction to SimplyReports and Export Express	3 hours
Outreach Services	2 hours

Polaris Admin Jeopardy!

Is it a Parameter or Profile?

PowerPAC

Polaris Admin Jeopardy!

Is it a Parameter or Profile?

Staff Client

Polaris Admin Jeopardy!

Is it a Parameter or Profile?

Default view selected when item record opened

Polaris Admin Jeopardy!

Is it a Parameter or Profile?

Acquisitions EDI Invoice Default

Polaris Admin Jeopardy!

Is it a Parameter or Profile?

Setting up the number of days after item is late that an overdue email is sent

Polaris Admin Jeopardy!

Is it a Parameter or Profile?

Hours of library is closed

Polaris Admin Jeopardy!

Is it a Parameter or Profile?

Hours library is closed for display in PAC

Polaris Admin Jeopardy!

Is it a Parameter or Profile?

Reading History

Polaris Admin Jeopardy!

**Is it a Database table or
Policy Table?**

Contact persons

Polaris Admin Jeopardy!

**Is it a Database table or
Policy Table?**

Patron Name Titles

Polaris Admin Jeopardy!

Is it a Database table or Policy Table?

Objects Locked

Thank You!

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Illinois Heartland Library System

Imagining Tomorrow – Delivering
possibilities Today!

 #IUG2019

IUG2019 
Phoenix, AZ