

Living in the cloud – Polaris Hosted Sites

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 #IUG2019

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Sunday, May 5th | Pre-Conference

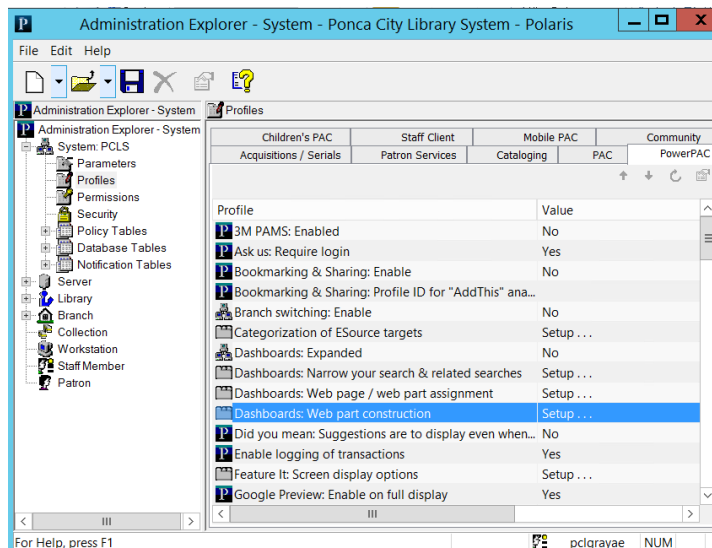
Monday, May 6th – Wednesday, May 8th | Main Conference

Multimedia

- Flyers and videos- find another host and copy link
 - City?
 - State Library?
 - Library association?
 - Free sites- youtube, etc.
 - Lots of vendors produce their own videos and host them on their sites

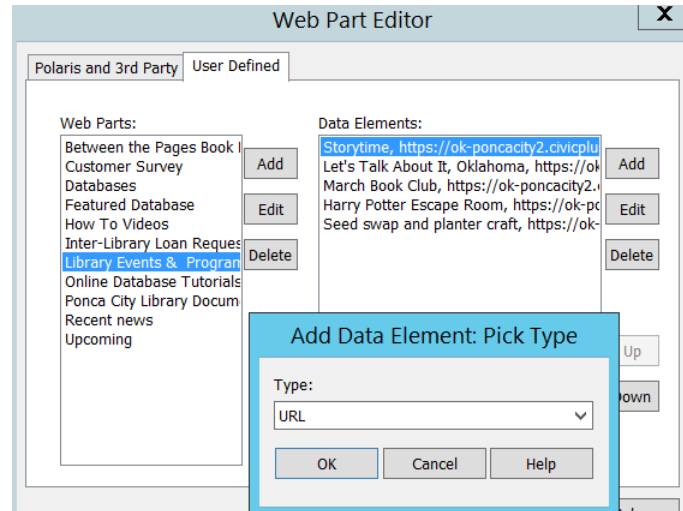
Multimedia

- To add multimedia to your OPAC site, follow this path:
Administration>Explorer>System
- Then select your system>Profiles>PowerPac>Dashboards:Web Part Construction



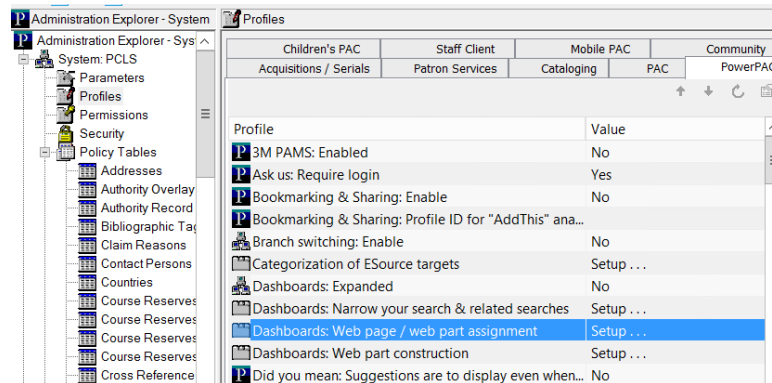
Multimedia

- Under Web Part Construction, select user defined and select or create the appropriate web part. For instance, for us to put our flyers on our OPAC, I select Library Events and Programs. Then add a data element via URL (since I'm copying link from another website).



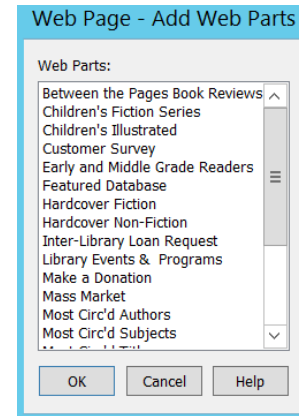
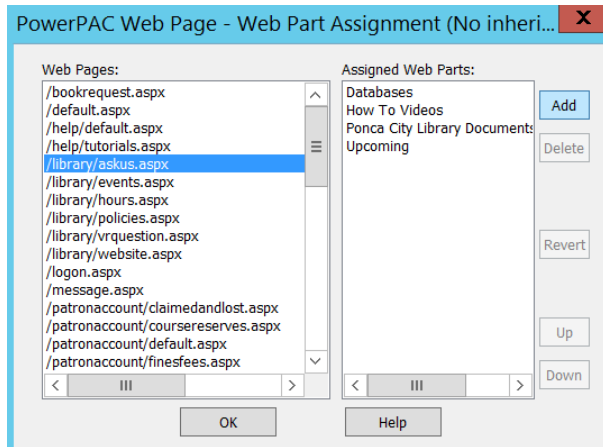
Multimedia: Assigning

- To make sure the media is going to the correct part of your OPAC, you will need to assign it to the correct page or make a page to host media.
- Navigate to Administration>Explorer>System>Profiles>PowerPac>Dashboards: Web page/web part assignment



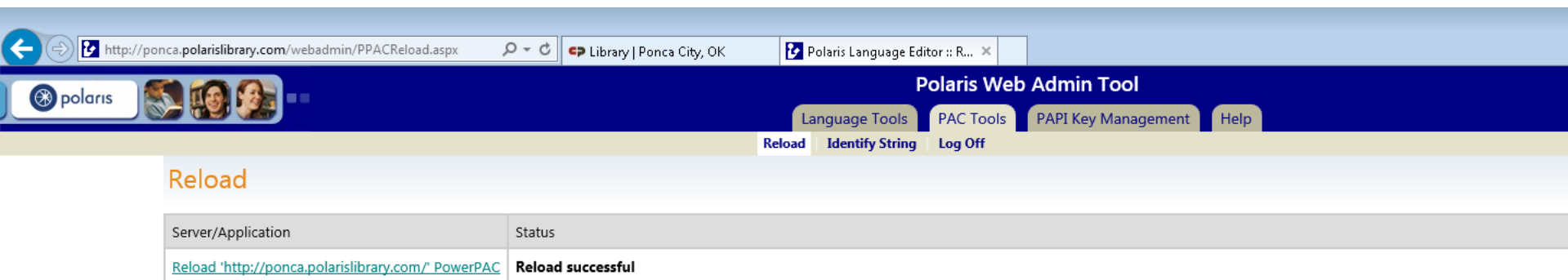
Multimedia: Assigning

- Find the page you want to add an element to and select the page.
- A list of elements already on the page will appear in the right-hand box.
- To add a new element, select **Add** button and search list for appropriate one.



Polaris Language Editor

- All changes completed in Polaris will need to be updated in Polaris Language Editor in order to change the OPAC.
- Once logged in, select PAC Tools tab and then select the Server/Application link to reload.



The screenshot shows the Polaris Web Admin Tool interface. The browser address bar displays the URL <http://ponca.polarislibrary.com/webadmin/PPACReload.aspx>. The page title is "Polaris Language Editor :: R...". The navigation menu includes "Language Tools", "PAC Tools", "PAPI Key Management", and "Help". The "PAC Tools" menu is expanded, showing "Reload", "Identify String", and "Log Off". The "Reload" option is selected, and the main content area displays a table with the following data:

Server/Application	Status
Reload 'http://ponca.polarislibrary.com/' PowerPAC	Reload successful

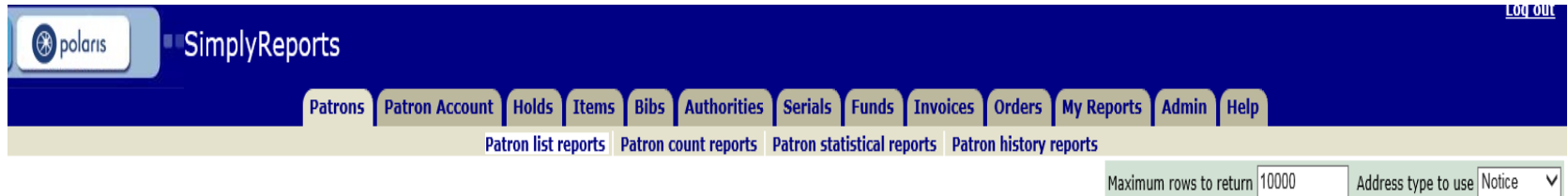
Simply Reports

- Simply reports gives you the ability to run reports and obtain data on your collection and users.

The screenshot displays the 'SimplyReports' web interface. At the top, there is a navigation menu with tabs for 'Patrons', 'Patron Account', 'Holds', 'Items', 'Bibs', 'Authorities', 'Serials', 'Funds', 'Invoices', 'Orders', 'My Reports', 'Admin', and 'Help'. Below the navigation, there are sub-tabs for 'Patron list reports', 'Patron count reports', 'Patron statistical reports', and 'Patron history reports'. The main content area is divided into three sections: 'Report output columns', 'Columns selected for output', and 'Columns selected for sort'. The 'Report output columns' section lists various fields such as 'Patron acct charges', 'Patron acct credits', 'Patron addr check date', 'Patron alt email address', 'Patron barcode', 'Patron birth date', and 'Patron block'. Below this list are checkboxes for 'Include header rows' (checked), 'Text file' (unchecked), and 'Excel file' (checked). A 'Delimiter type' dropdown menu is set to 'Comma & Quotes'. The 'Columns selected for output' and 'Columns selected for sort' sections are currently empty. A 'Submit' button is located below the configuration options. At the bottom of the page, there is a footer with the text 'Copyright © 2019 Innovative Interfaces, Inc.' and the 'SimplyReports v. 5.5 Build 283' version information.

Simply Reports

- There are a multitude of options and filters to help you break down the results for which you are looking.
- Top Tabs



The screenshot shows the SimplyReports interface. At the top left is the Polaris logo and the text "SimplyReports". A "LOG OUT" link is in the top right. Below the header is a row of navigation tabs: Patrons, Patron Account, Holds, Items, Bibs, Authorities, Serials, Funds, Invoices, Orders, My Reports, Admin, and Help. Underneath these tabs is a row of report categories: Patron list reports, Patron count reports, Patron statistical reports, and Patron history reports. At the bottom right, there are two input fields: "Maximum rows to return" with the value "10000" and "Address type to use" with a dropdown menu showing "Notice".

Simply Reports

- Output Columns

Report output columns

Patron acct charges
Patron acct credits
Patron addr check date
Patron alt email address
Patron barcode
Patron birth date
Patron block

Columns selected for output

Columns selected for sort

Include header rows
 Text file
 Excel file

Delimiter type

Submit

Simply Reports

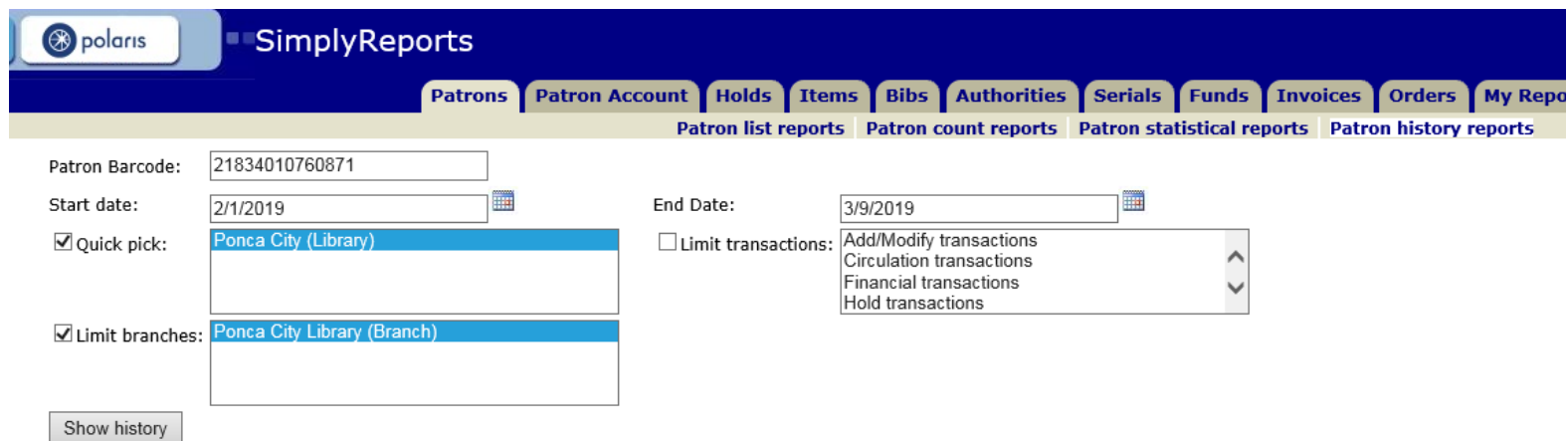
- Filters

- + Patron general filters
- + Patron date filters
- + Patron relative dates filters
- + Patron miscellaneous filters
- + Patron block and note filters
- + Patron user defined fields filters
- + Patron ID filters

Submit

Simply Reports: Customers

- Popular reports we run include patron history. This is helpful if a customer is contesting something and you want to establish a pattern or get more details on actions in the past.



The screenshot shows the Polaris SimplyReports interface. At the top, there is a navigation bar with the Polaris logo and the title 'SimplyReports'. Below this is a menu with tabs for 'Patrons', 'Patron Account', 'Holds', 'Items', 'Bibs', 'Authorities', 'Serials', 'Funds', 'Invoices', 'Orders', and 'My Reports'. Under the 'Patrons' tab, there are sub-tabs for 'Patron list reports', 'Patron count reports', 'Patron statistical reports', and 'Patron history reports'. The main area contains search filters: 'Patron Barcode:' with the value '21834010760871', 'Start date:' with '2/1/2019', and 'End Date:' with '3/9/2019'. There are checkboxes for 'Quick pick:' and 'Limit branches:', both of which are checked. The 'Quick pick:' dropdown is set to 'Ponca City (Library)' and the 'Limit branches:' dropdown is set to 'Ponca City Library (Branch)'. There is also a 'Limit transactions:' checkbox which is unchecked, with a dropdown menu showing options: 'Add/Modify transactions', 'Circulation transactions', 'Financial transactions', and 'Hold transactions'. A 'Show history' button is located at the bottom left of the form area.

Simply Reports: Displays

- Another popular report is checking stats on displays in the library. We run this monthly.

The screenshot shows the Polaris SimplyReports interface. At the top, there is a navigation bar with the Polaris logo and the title 'SimplyReports'. Below this, there are several tabs: Patrons, Patron Account, Holds, Items, Bibs, Authorities, Serials, Funds, Invoices, Orders, and My Reports. Underneath these tabs, there are sub-tabs for 'Item list reports', 'Item count reports', 'Item statistical reports', and 'Item history reports'. The main content area is divided into three sections: 'Report output columns', 'Columns selected for output', and 'Columns selected for sort'. The 'Report output columns' section contains a list of columns: Item record status name, Item renewal limit, Item sending branch abbreviation, Item sending branch name, Item shelving scheme, Item statistical code, and Item system block. The 'Columns selected for output' section contains a list with 'Item shelf location'. The 'Columns selected for sort' section also contains a list with 'Item shelf location'. Below these sections, there are checkboxes for 'Include header rows', 'Text file', and 'Excel file'. The 'Excel file' checkbox is checked. There is also a 'Delimiter type' dropdown menu set to 'Comma & Quotes'. A 'Submit' button is located at the bottom right of the form.

Report output columns

- Item record status name
- Item renewal limit
- Item sending branch abbreviation
- Item sending branch name
- Item shelving scheme
- Item statistical code
- Item system block

Columns selected for output

- Item shelf location

Columns selected for sort

- Item shelf location

Include header rows
 Text file
 Excel file

Delimiter type: Comma & Quotes

Submit

Simply Reports: Displays

History action

Checked in - item was previously lost by the patron
Checked in via In House
Checked out
Checked out - Mobile PAC

Loan period code

1 week
2 day
2 week
3 day
4 week
6 week

Material type

Adopt A Book Paperback
Adult Book Club Theme Kit
Adult Theme Kit
Audiobook

Owner

Ponca City (Library)
Ponca City Library (Branch)
Ponca City Library System (System)

Record status

Final
Provisional
Deleted

Shelf location

Quick Pick -- (Org: PCL)
Reference Desk -- (Org: PCL)
Square tiered -- (Org: PCL)
Square-tiered 2 -- (Org: PCL)
Staff Picks -- (Org: PCL)
Wooden A-Frame -- (Org: PCL)

Item date filters

- | | | | |
|--|---------------------------------------|--|--------------------------------------|
| <input type="checkbox"/> PO release date | <input type="text"/> | <input type="text"/> | |
| <input type="checkbox"/> Creation date | <input type="text"/> | <input type="text"/> | |
| <input type="checkbox"/> Due date | <input type="text"/> | <input type="text"/> | |
| <input type="checkbox"/> First available date | <input type="text"/> | <input type="text"/> | |
| <input checked="" type="checkbox"/> Item record history transaction date * | <input type="text" value="2/1/2019"/> | <input type="text" value="2/28/2019"/> | |
| <input type="checkbox"/> Imported date | <input type="text"/> | <input type="text"/> | |
| <input type="checkbox"/> In-transit received date | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Not present |
| <input type="checkbox"/> In-transit sent date | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Not present |
| <input type="checkbox"/> Last check in date | <input type="text"/> | <input type="text"/> | |
| <input type="checkbox"/> Last check out or renewal date | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Not present |
| <input type="checkbox"/> Last activity date | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Not present |
| <input type="checkbox"/> Last circ status change date | <input type="text"/> | <input type="text"/> | |
| <input type="checkbox"/> Last inventory date | <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Not present |
| <input type="checkbox"/> Last overdue notice date | <input type="text"/> | <input type="text"/> | |
| <input type="checkbox"/> Modification date | <input type="text"/> | <input type="text"/> | |
| <input type="checkbox"/> Record status date | <input type="text"/> | <input type="text"/> | |

Simply Reports: Tech Monthly

- Patrons with expiration date of over 910 days before report was run; who also have a zero outstanding balance.
- Patron's with expiration date of over 4 years before report was run; who also have outstanding fines of any amount

Simply Reports: Removing patrons

- Create you final report columns. For this report we need: Patron acct charges, Patron barcode, Patron expiration date, and Patron full name.

The screenshot shows the 'SimplyReports' interface. At the top, there is a navigation bar with the 'polaris' logo and the title 'SimplyReports'. Below this is a menu with tabs for 'Patrons', 'Patron Account', 'Holds', 'Items', 'Bibs', 'Authorities', 'Serials', 'Funds', 'Invoices', 'Orders', 'My Reports', 'Admin', and 'Help'. Under the 'Patrons' tab, there are sub-tabs for 'Patron list reports', 'Patron count reports', 'Patron statistical reports', and 'Patron history reports'. The 'Patron list reports' sub-tab is active, showing a 'Maximum rows to return' field set to '10000' and an 'Address type to use' dropdown set to 'No'. Below this, there are three columns for report configuration: 'Report output columns', 'Columns selected for output', and 'Columns selected for sort'. The 'Report output columns' list includes 'Patron fax', 'Patron first name', 'Patron former barcode', 'Patron free text block', 'Patron free text block date', 'Patron free text message', and 'Patron free text message date'. The 'Columns selected for output' list includes 'Patron acct charges', 'Patron barcode', 'Patron expiration date', and 'Patron full name'. The 'Columns selected for sort' list includes 'Patron acct charges', 'Patron barcode', 'Patron expiration date', and 'Patron full name'. Below these columns are checkboxes for 'Include header rows' (checked), 'Text file' (unchecked), and 'Excel file' (checked). A 'Delimiter type' dropdown is set to 'Comma & Quotes'. A 'Submit' button is located at the bottom right of the configuration area.

Simply Reports

- Under this section you will pick the Patron Branch, again we are a single site library so I only need to pick Ponca City Library.

Patron general filters

Patron record set

Patron branch:

Library quick pick Ponca City

Branch Ponca City Library

Patron code Adult

Statistical class Select a branch first! Not present

Language English

Resource Group

Vendor Account

Simply Reports: Removing Patrons

- Once you hit Submit at the bottom of the page you will get your results page. You are going to want to checkmark the Create patron record set from report results, then name it something that makes sense to you. I always name this record set, “Patrons for removal and the month & year.”

Create patron record set from report results

Record set name

Record set note



Save record set

There were 265 results, to download the report use the checkbox (above).

ChargesAmount	PatronBarcode	ExpirationDate	PatronFullName
0.00	21634010271337	6/2/2016 12:00:00 AM	Brown, Adrienne Kay
0.00	21634010293166	4/15/2015 12:00:00 AM	Authentication, Keychain
0.00	21634010293299	8/15/2016 12:00:00 AM	Valentine, Krista L
0.00	21634010294115	8/21/2016 12:00:00 AM	Whetzel, Howard Clay
0.00	21634010296516	6/14/2016 12:00:00 AM	Funkhouser, Teresa L
0.00	21634010297407	7/30/2016 12:00:00 AM	Willaford, Haylee R
0.00	21634010298835	5/30/2016 12:00:00 AM	Thibodeaux, Jennifer A
0.00	21634010301639	6/4/2016 12:00:00 AM	Fast, Cammie Ladawn
0.00	21634010301936	6/24/2016 12:00:00 AM	Caughlin, Kathrine Shevaun
0.00	21634010302082	7/8/2016 12:00:00 AM	Scott, Edwin Duane
0.00	21634010302348	6/6/2016 12:00:00 AM	Fleshman, Riley Christopher
0.00	21634010302470	5/22/2016 12:00:00 AM	Pelts, Recinda M
0.00	21634010302751	5/21/2016 12:00:00 AM	Olmstead, Deven Lee



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Phoenix, AZ

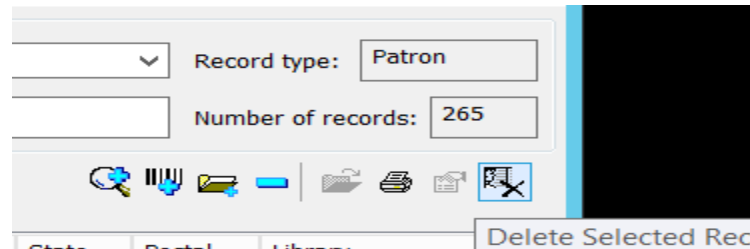
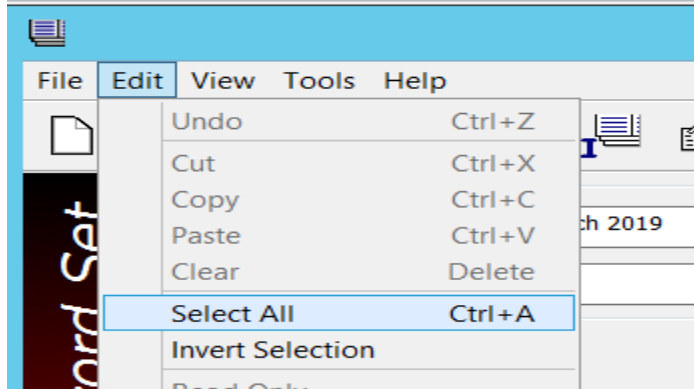
Simply Reports: Removing Patrons

- Once you create that patron record set you will pull it up inside Polaris underneath Patron Services -> Record sets. Search by name you used when creating record set.

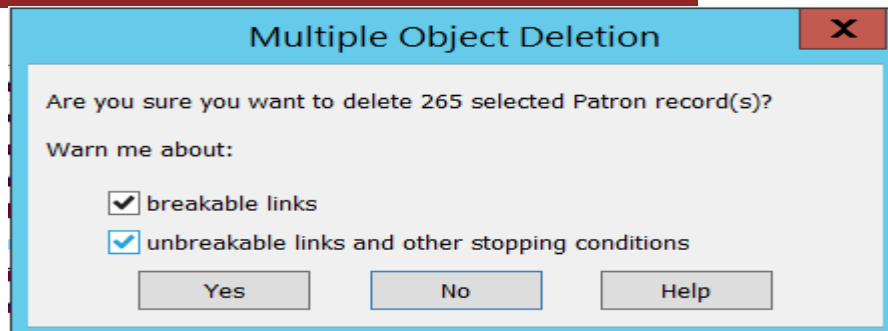
Name	Record Type	Owner	Total...	Creation Date	Note
Patrons for removal March 2019	Patron	Ponca City ...	265	3/4/2019	

Simply Reports: Removing Patrons

- Open the record set and load all results if over 250. Then choose Edit -> Select All. Once all are highlighted, Click the last icon on the right of the cool bar, which is Delete Selected Records.



Simply Reports: Removing Patrons



- Once you get your Multiple Object Deletion pop-up I unselect both of these warning boxes, then click Yes button. The deletion will happen very quickly: Make sure you make a note of the total number of records you are deleting for any reporting you need to do. I include this in my monthly report to our Director.

Simply Reports: Removing Patrons



- Example of the type of pop-ups that will come up for almost every one of your records if you forget to uncheck the boxes from the pervious slide. These just make the deletion process way more involved than necessary.

Simply Reports: Removing Patrons

- Patron's with expiration date of over 5 years before report was run; who also have outstanding fines of any amount.

Create patron record set from report results

Record set name

Record set note

 **Save record set**

[Record set Patron's for removal who owe fines saved.](#)

There were 35 results, to download the report use the checkbox (above).

This report is done nearly identical to the first one, only differences are underneath the Patron relative date filters you choose Expiration date more than 5 years before the report was run and Charge amount should be set to greater than or equal too \$0.00. The results tend to be much smaller than the first report. You will open and delete these inside Polaris the same way as before. We came up with the 5 year term because in Oklahoma the statue of limitation on theft is 5 years.

Ordering/Cataloging

- Let's talk Templates!
 - Bibliographic Templates how many do you have? We have 23. You want a bibliographic template for all your different material types.

Name	Owner	Date Created	Last Modified
Adult Book Club Kit	Ponca City Library System	12/9/2016	12/9/2016
Adult Theme Kit	Ponca City Library System	12/8/2016	
Children's Book Club Theme Kit	Ponca City Library System	8/2/2018	10/22/2018
Default - Book (Fiction)	Ponca City Library System	2/12/2007	
Default - Book (NonFiction)	Ponca City Library System	2/12/2007	
Default - Book (ShortForm)	Ponca City Library System	2/12/2007	
Default - Realia (Unspecified)	Ponca City Library System	2/12/2007	
Default - Serial	Ponca City Library System	2/12/2007	
Default - Sound Recording (CD)	Ponca City Library System	2/12/2007	
Default - Video Recording (DVD)	Ponca City Library System	2/12/2007	
On-Order Adult Book Club Kit	Ponca City Library System	12/9/2016	
On-Order Adult DVD	Ponca City Library System	5/6/2015	3/16/2016
On-Order Adult Theme Kit	Ponca City Library System	12/9/2016	
ON-ORDER Children's Book Club The...	Ponca City Library System	8/6/2018	10/22/2018
On-Order Children's DVD	Ponca City Library System	5/29/2015	3/16/2016
On-Order Hotspot	Ponca City Library System	10/22/2018	10/22/2018
On-Order Large Print	Ponca City Library System	5/12/2015	3/16/2016
On-order Non-musical sound recordi...	Ponca City Library System	1/5/2015	
On-Order Online Database	Ponca City Library System	5/7/2015	3/16/2016
On-Order Periodicals	Ponca City Library System	5/21/2015	3/16/2016
On-order Sound Recording (CD) Pol...	Ponca City Library System	1/5/2015	1/5/2015
ON-ORDER Young Adult Book Club ...	Ponca City Library System	8/6/2018	10/22/2018
Young Adult Book Club Theme Kit	pchullmk	8/6/2018	

These are the default ones that Polaris helped set up at time of implementation.

Ordering/Cataloging

- The ON-Order Bibliographic Templates are going to drive what your bibliographic records look like when you release new Purchase Orders.

Tag	Ind	Data
└┐DR		nom 22 4500
008		161208
049		+aPCLA
590		+aAdd description of individual items contained within the kit here, include price of each item.
590		+aAdd description of individual items contained within the kit here, include price of each item.
590		+aAdd description of individual items contained within the kit here, include price of each item.
590		+aAdd description of individual items contained within the kit here, include price of each item.
590		+aAdd description of individual items contained within the kit here, include price of each item.
590		+aAdd description of individual items contained within the kit here, include price of each item.
590		+aAdd description of individual items contained within the kit here, include price of each item.
590		+aAdd description of individual items contained within the kit here, include price of each item.
590		+aAdd description of individual items contained within the kit here, include price of each item.
590		+aAdd description of individual items contained within the kit here, include price of each item.

Ordering/Cataloging

Control number: Owner: Items: Record status:

Title: Display in PAC ILL Host

Tag	Ind	Data
LDR		nom 22 4500
001		156032
005		20190304121023.0
008		161208 2019
020		+c\$42.93
245	10	+aAll About Sea Life
260		+c2019
590		+aAdd description of individual items contained within the kit here, include price of each item.
590		+aAdd description of individual items contained within the kit here, include price of each item.
590		+aAdd description of individual items contained within the kit here, include price of each item.
590		+aAdd description of individual items contained within the kit here, include price of each item.
590		+aAdd description of individual items contained within the kit here, include price of each item.
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590		+aAdd description of individual items contained within the kit here, include price of each item.
590		+aAdd description of individual items contained within the kit here, include price of each item.
590		+aAdd description of individual items contained within the kit here, include price of each item.
049		+aPCLA

Ordering/Cataloging

- Item Templates- How many do you have?
- We have 130! You will need at least 2 different item templates for every collection that you have. We have 54 collections. You will create each item template by naming the template after a collection. Then setting all the different aspects of the item record screen. Once you save that template you will copy your worksheet and add the words “On-Order” in front of the template name. This is important for when you are setting up EDI ordering via ipage for Ingram.

Ordering/Cataloging

Name	Assigned Bra...	Collection	Material Type	Status	Owner	Date Created	Last Modified
ABC	Ponca City Li...	ABC (ABC)	Book	In-Process	Ponca City Library System	6/25/2014	6/25/2014
ABC Spanish	Ponca City Li...	ABC Spanish (ABCSp)	Book	In-Process	Ponca City Library System	6/25/2014	7/1/2014
On-Order ABC	Ponca City Li...	ABC (ABC)	Book	On-Order	Ponca City Library System	6/25/2014	6/25/2014
On-Order ABC Spa...	Ponca City Li...	ABC Spanish (ABCSp)	Book	On-Order	Ponca City Library System	6/25/2014	6/25/2014

Creating your templates will take a lot of time. Creating your grids inside iPage will take a lot of time. All this effort will be worth it in the end because when you bring in your on-order records from iPage to create your purchase orders things will go so much smoother.

Ordering/Cataloging

Tag	Ind	Data
LDR		nam 22 5a 4500
001		155727
005		20190225105002.0
008		190225s2018
020		+a9781844779079+c\$11.99
020		+a1844779076+c\$11.99
035		+a in502266514
082	00	+a745.54
100	1	+aPainter, Lucy
245	10	+a125 Papercraft Projects: Step-By-Step Papier Mache, Decoupage, Paper Cutting, Collage, Decorative Effects & Paper Construction
260		+bSouthwater Publishing+c20180306
970		+bNonfiction+f700#IPCL+m2+p11.99+q1

The 970 field that is created by Ingram and comes with your brief on-order records contains all the information that will be needed to transfer over to the on-order item record that will be created at the time of releasing your PO. From left to right our 970 field lists: collection name, fund name, holdings code, price, and order quantity.

Ordering/Cataloging

Tag #	Subfield	Data Element	Exclude From Download	Action
001		Ingram Control Number	<input type="checkbox"/>	
008		File Created Date	<input type="checkbox"/>	
010	a	Library of Congress Control Number (LCCN)	<input type="checkbox"/>	
020	a	ISBN/EAN (depending on your MARC download format)	<input type="checkbox"/>	<input type="radio"/> ISBN <input type="radio"/> EAN <input checked="" type="radio"/> Both
020	c	Price	<input type="checkbox"/>	
024	a	Universal Product Code	<input type="checkbox"/>	
024	d	Universal Product Code (Additional digits)	<input type="checkbox"/>	
035	a	Alternate Control Number	<input type="checkbox"/>	
082	a	Dewey	<input type="checkbox"/>	
100	a	Author	<input type="checkbox"/>	
245	a	Title	<input type="checkbox"/>	<input type="checkbox"/> Use ALL CAPS in brief MARC
260	b	Publisher	<input type="checkbox"/>	
260	c	Pub Date	<input type="checkbox"/>	
970	b	Collection Code	<input type="checkbox"/>	<input type="button" value="Add/Edit Values"/> <input type="button" value="Edit Mapping"/> <input type="button" value="Delete"/>
970	f	Fund	<input type="checkbox"/>	<input type="button" value="Add/Edit Values"/> <input type="button" value="Edit Mapping"/> <input type="button" value="Delete"/>
970	l	Location	<input type="checkbox"/>	<input type="button" value="Add/Edit Values"/> <input type="button" value="Edit Mapping"/> <input type="button" value="Delete"/>
970	m	Material Type	<input type="checkbox"/>	<input type="button" value="Add/Edit Values"/> <input type="button" value="Edit Mapping"/> <input type="button" value="Delete"/>
970	n	Notes	<input type="checkbox"/>	<input type="button" value="Edit Mapping"/> <input type="button" value="Delete"/>
970	p	Price	<input type="checkbox"/>	<input type="button" value="Edit Mapping"/> <input type="button" value="Delete"/>
970	q	Copies (Total Quantity)	<input type="checkbox"/>	<input type="button" value="Edit Mapping"/> <input type="button" value="Delete"/>

Simple Grid (optional)

You may choose up to three 900 level fields below to be used when applying a Simple Grid to a title on a Selection List. The Simple Grid option will appear on the Product Detail page when editing a title from a Selection List provided you specify the fields you want to include in Simple Grid below.

Simple Grid Option 1:

Simple Grid Option 2:

Simple Grid Option 3:

Grid Summary Setup (optional)

Choose two 900/subfield tags that you would like to use in summarizing quantity and dollar totals for your selection lists. By selecting two tags below, you will have an additional Display option on your Selection Lists that allows you to see quantity and dollar totals accumulated by the two tags for each selection list. Please click the "Complete" button at the bottom of the page to save your selections.

Grid Summary Selection 1:

Grid Summary Selection 2:

Ordering/Cataloging

Add/Edit Collection Code Values

[HELP: SERIALS LIPSUM'S LIFE](#)

Add Value

[\(Add Multiple Values\)](#)

Values

Value	Action
ABC	<input type="button" value="Delete"/>
ABC Spanish	<input type="button" value="Delete"/>
Board Book Spanish	<input type="button" value="Delete"/>
Board books	<input type="button" value="Delete"/>
BOCD	<input type="button" value="Delete"/>
Children's MP3	<input type="button" value="Delete"/>
Children's Professional	<input type="button" value="Delete"/>
Children's Reference	<input type="button" value="Delete"/>
DVD	<input type="button" value="Delete"/>
Easy Picture	<input type="button" value="Delete"/>
EP Spanish	<input type="button" value="Delete"/>
Fiction	<input type="button" value="Delete"/>
Genealogy	<input type="button" value="Delete"/>

Ordering/Cataloging

Add/Edit Fund Values

Add Value

 [\(Add Multiple Values\)](#)

Values

Value	Action
000-100	<input type="button" value="Delete"/>
200	<input type="button" value="Delete"/>
300	<input type="button" value="Delete"/>
400	<input type="button" value="Delete"/>
500	<input type="button" value="Delete"/>
600	<input type="button" value="Delete"/>
700	<input type="button" value="Delete"/>
800	<input type="button" value="Delete"/>
900	<input type="button" value="Delete"/>
AAV	<input type="button" value="Delete"/>
Adult Fiction	<input type="button" value="Delete"/>
Bestseller Fiction	<input type="button" value="Delete"/>
Bestseller Nonfiction	<input type="button" value="Delete"/>
Bestsellers	<input type="button" value="Delete"/>
Bestsellers AV	<input type="button" value="Delete"/>
CGift	<input type="button" value="Delete"/>
Child	<input type="button" value="Delete"/>
Child AV	<input type="button" value="Delete"/>

Ordering/Cataloging

Add/Edit Location Values

[Turn Search Options Off](#)

Add Value

[\(Add Multiple Values\)](#)

Values

Value

Action

PCL

We are a single site library so we only have one location set up in ipage.

Ordering/Cataloging

Add/Edit Material Type Values

[View Current Assigned Material Types](#)

Add Value

[Add Multiple Values](#)

Values

Value	Action
1	<input type="button" value="Delete"/>
11	<input type="button" value="Delete"/>
13	<input type="button" value="Delete"/>
2	<input type="button" value="Delete"/>
3	<input type="button" value="Delete"/>
4	<input type="button" value="Delete"/>

These material Type numbers come directly from Polaris. They have to match exactly.

How do you find your material type numbers?

- Under Administration Explorer-> Expand System -> Expand Policy Tables -> Open Material Types. Then just double click on each one and you will find the number you will need to add inside lpage. Examples on following slides.

Ordering/Cataloging

Modify : Material Types - 2

Description:

Modify : Material Types - 3

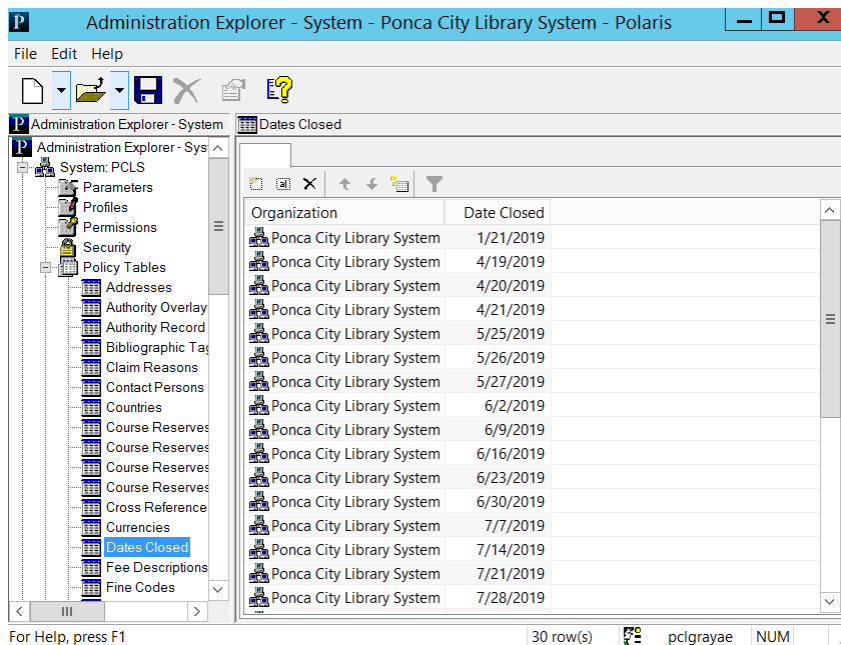
Description:

Modify : Material Types - 11

Description:

Adding closed dates

- Follow this path to get to the correct place in Polaris: Admin>System>Policy Tables>Dates Closed



The screenshot shows the 'Administration Explorer - System - Ponca City Library System - Polaris' window. The left-hand navigation pane is expanded to 'Policy Tables' > 'Dates Closed'. The main window displays a table with the following data:

Organization	Date Closed
Ponca City Library System	1/21/2019
Ponca City Library System	4/19/2019
Ponca City Library System	4/20/2019
Ponca City Library System	4/21/2019
Ponca City Library System	5/25/2019
Ponca City Library System	5/26/2019
Ponca City Library System	5/27/2019
Ponca City Library System	6/2/2019
Ponca City Library System	6/9/2019
Ponca City Library System	6/16/2019
Ponca City Library System	6/23/2019
Ponca City Library System	6/30/2019
Ponca City Library System	7/7/2019
Ponca City Library System	7/14/2019
Ponca City Library System	7/21/2019
Ponca City Library System	7/28/2019

The status bar at the bottom indicates '30 row(s)' and the user 'pclgrayae' is logged in.

Adding closed dates

- Select first square to add a new date closed.
- Select appropriate branch/system.
- Select Date.
- Save.
- To go in effect, Polaris needs to be logged out and logged back in.

Adding closed dates

The screenshot shows the 'Administration Explorer - System' interface for the Ponca City Library System. The left sidebar lists various system components, with 'Dates Closed' selected. The main window displays a table with the following data:

Organization	Date Closed
Ponca City Library System	12/23/2016
Ponca City Library System	12/24/2016
Ponca City Library System	12/25/2016
Ponca City Library System	12/26/2016
Ponca City Library System	1/1/2017
Ponca City Library System	1/2/2017

The status bar at the bottom indicates '6 row(s)', the user 'pclgrayae', and the 'NUM' column.

Questions?

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