What to notice when looking at bibliographic record:

- <ctrl> and the mouse wheel allows for one to zoom in and out but only in the MARC display
- Owner most bibliographic records are owned by SHARE
- If owned by Abraham Lincoln— "Do not edit" (you won't be allowed to) NEVER EVER EVER Change the owner Just remember it is NEVER AN OPTION
- Record Status should be FINAL
 - Provisional you will not be allowed to attach items
 - Deleted Marked for Deletion



Icons - what they mean

- Checks the authority files



- Validates the MARC fields

Checks for duplicates





Add an item

Place a hold



- Go to Linked Item records

Editing in Polaris is very simple

- Insert a MARC tag be on line and press <Enter>
- Type in tag numbers, two indicators tricky part is the delimiter 1st one is assumed
- <Ctrl> Q to insert delimiter
- To delete much the same as in Word processing, highlight and <delete>
- Make note of display tag at bottom that describes the MARC tag
- Diacritics (ALT D)
- SAVE File (Keep on Saving)

ZMARC and Authority Files – will explain more as we learn more. Hasn't worked properly for training. :-(

Duplicates –We will be working with the tables, and this will be taught/explained thoroughly at one of the monthly meetings. The order bibs will be IN ALL CAPS and these should be merged. ALWAYS look before you decide to merge. Better yet, for now, just keep saving. Below is an example of what we are dealing with. Some may be matches, others are not.

Control n	Owner	Title			Author	For	mat	Linked items	Status	
1238998	SHARE	Of mice and men			Steinbeck, John, 19	Вос	bk	29	Final	
ecords <mark>t</mark> o re	place:		Ģ	3 -	≝ ≞ ₪					
Control	Owner	Title	Author	Format	Linked it	Status	System-detected	duplicate		
907290	SHARE	Of mice and men.	Steinbeck	Book	4	Final	Author/Title;Title	/260\$c		
1606718	SHARE	Of mice and men.	Steinbeck	Book	9	Final	Author/Title			
1748329	SHARE	Of mice and men	Steinbeck	Book	7	Final	Author/Title;Title	/260\$c		
1840158	SHARE	Of mice and men	Steinbeck	Book	15	Final	Author/Title			
	SHARE	Of mice and men	Steinbeck	Book	1	Final	Author/Title			
1895397		Of mice and men.	Steinbeck	Book	1	Final	Author/Title;Title	/260\$c		
1895397 2385073	SHARE						- N. 2012 15 25 20 10 10 10 10 10 10			

How to add an item with no template:

1. From the Bibliographic record, choose the

		ī	
--	--	---	--

tem Record Options	
tle: Of mice and men uthor: Steinbeck, John, 1902-1968.	Find Image: State of the st
Call number Scheme: Dewey Decimal	Use template values instead of these (if available)
Prefix: Class:	Price:
Cutter:	Circ status: In Process
Suffix:	Renewal limit: 0 🚓
Vol:	✓ Display in PAC ✓ Loanable outside system
Copy:	□ Non-circulating □ Holdable □ Use system assigned barcodes
tribution em total: 1 Barcode total: 0	
tems Branch Collection Shelf Locat	ion Material Type Loan Period Fine Code Stat Code Owner Template
1	(None)

- 2. Fill in price, barcodes in the upper parts. V Check the boxes necessary.
- 3. In the lower part, fill in number of items, branch, collection, shelf location. Material Type, Loan Period, Fine Code are all the same. Stat Code if necessary. Owner can be same as branch, but could be library.
- 4. Call number Explanation
 - a. Scheme most will be Dewey. If local call number scheme, as for AV, it is best if Dewey or Other is chosen. Most important thing is to be consistent.
 - b. Prefix --- the start of a call number. REF, R, J, DVD are examples. Helps define the type of material or location. Library defined.
 - c. Class Dewey classification number, such as 364.1532. LC will begin with letters. Local classification schemes are used in many of the state agency libraries within SHARE, such as the Illinois State Museum and the Abraham Lincoln Presidential Library.
 - d. Cutter It is an alphanumeric device to code text so that it can be arranged in alphabetical order using the fewest characters. It contains one or two initial letters and Arabic numbers, treated as a decimal OR a combination of letter and numbers to alphabetically arrange the books by author or title. In public libraries, usually first three letters of author or title. Cutter lines and cutter numbers are named for

Charles Ammi Cutter, the 19th century librarian who created this classification system.

- e. Suffix –other identifying information that determines location or type of material. Library defined.
- f. Vol. --- be sure to format it according to your library's standard. A consistent format ensures that volume numbers are sorted correctly in the Find Tool. In addition, if your library allows first available copy holds for parts of multi-part titles, the items attached to the multi-part title must have consistently-formatted volume numbers. Serials will need to be consistent across the database.
- g. Copy

	ormation							Item bard	:ode(s)	
Title:	Of mice and	men				Find				
uthor:	Steinbeck, J	ohn, 1902-196	8.		E	Bib control:	1238998	abe 1 abe 1	121 120	
Call n Scher	umber me: Dew	ey Decimal	•	🔲 Use templat	e values instea	ad of these (if	available)			
Prefix	с			Price:	\$15.00		1			
Cutte	er: STE	88		Circ status:	In-Process	•	1			
Suffix	c			Renewal limit:	0 ÷					
Vol:				Display in PA	AC 🔽 Lo	anable outsid	e system			
Сору	:			Non-circulat	ing 🔽 H	oldable		Use s	ystem assigned b	oarcodes
stributi tem to	ion tal: 2	 Barcode	total: 2							- ×
Items	Branch	Collection	Shelf Location	Material Type	Loan Period	Fine Code	Stat Code	Owner	Template	<u> </u>
2	Illinois Heartla	Accelerated R	Main	Book	Book	Book	(None)	IHLS - Carter	(None)	

- 5. Material type, Loan Period and Fine Code should all be the same.
- 6. Press OK.

Polaris Cataloging Handouts

P Bibliographic R	ecord 123899	8 : Bulk Crea	ated Item R	ecords						
File Edit Help										
🔁 🗁 ·	X	7 2								
Title	Assigned	Collection	Material	Shelf L	Call Nu	Vo	Status	Barcode	Reco	Contr
Of mice and men	Illinois He	Accelera	Book	Main	813.88		In-Pr	abe 120	Final	9605187
Of mice and men	Illinois He	Accelera	Book	Main	813.88		In-Pr	abe 121	Final	9605188
<u> </u>										
For Help, press F1					2 re	cords				NUM //

7. Highlight each item to double check item record and make any corrections or changes.

🛄 Item	Record 9605187	' - Cataloging - Polaris					
File Edit	t View Links To	ools Help					
	≥ Ę ∉	- 🗙 🛛 🗗 🚺 🖸	3 📴 4	r 🔀 🗐	*	f [?	
p.	Barcode:	be 120 Record s	tatus: Final		🗖 Ebook	Non-circulating	Display in PAC
5	Title:	Of mice and men			Find	Bib control no.:	1238998
ů.	Author:	einbeck, John, 1902-1968.		Parent item:		Item control no.:	9605187
Re	Call number:	313.88 STE		Price: \$1	5.00	Issue control:	
m	Owner:	IHLS - Carterville (lib)	•	Shelf location:	Main		•
Ite	Assigned:	Illinois Healtland Library System - Decatur (zde	es) 💌	Temporary location:			
æ	Collection:	Accelerated Reader 9 (ar9)	•	Circulation status:	In-Process	▼ 2/12/201	3 6:45:36 PM
5	Circulation param	neters	Call number		R	lequest	
	Material type	Book	Scheme:	Dewey Decimal	_	Loanable	
2	Loan period:	Book	Prefix:			✓ Holdable	
=	Fine code:	Book	Class:	813.88		Limit to:	
R	Renewal limit	: 0 ÷	Cutter:	STE		Pickup at this t	pranch
	Stat code:		Suffix:			library and bra	nches
	Startesact		Vol:			Patrons from t	his branch only
	Name of piece:		Copy:	X		Preferred borr	owers
			\backslash				
	Issue:		X^{-}				
For Help, p	press F1						
	1						

- 8. Input Copy information if desired. And Save.

Input item information from template:

1. Search or retrieve bibliographic record. Again, choose the



Ē.

Item R	Record Opti	ons							
tem info	rmation							Item	barcode(s)
Title:	Of mice and	l men				Find			
Author:	Steinbeck,	John, 1902-196	58.			Bib control:	2293152		
Call nu Schem	imber ne: Dev	vey Decimal	•	🗖 Use templat	e values inste	ad of these (if	f available)		
Prefix Class:	· [Price:					
Cutter	r:			Circ status:	In-Process	•]		
Suffix	: [Renewal limit:	0 📫				
Vol:				Display in PA	AC 🔽 La	anable outsid	de system		
Copy:				Non-circulat	ing 🔽 H	oldable			lse system assigned barcode
istributio Item tot	on al: 1	 Barcode	e total: 0						
Items	Branch	Collection	Shelf Location	Material Type	Loan Period	Fine Code	Stat Code	Owner	Template
1									(None)

- 3. Choose template.
- 4. You will notice Material Type, Fine Code and Loan Period is filled in, as well as some other basic information. Input information such as call number, check boxes, barcode. Press OKAY and double check as before.

Polaris Cataloging Handouts

Item	Record Optio	ns							
em info itle:	ormation Of mice and	men				Find		Item bard	:ode(s)
uthor:	, Steinbeck, Jo	ohn, 1902-196	8.		i	Bib control:	2293152		
Call n Schei	me: Dewe	ey Decimal	•	Use templat	te values instea	ad of these (if	favailable)		
Prefi: Class	x: FIC			Price:					
Cutte	er: STE			Circ status:	In-Process	•]		
Suffi	x:			Renewal limit:	0 ÷				
Vol: Copy	/: C. 2			 Display in P/ Non-circulat 	AC 🔽 Lo	oanable outsio oldable	le system	Use s	system assigned barcode
stribut tem to	ion otal: 1	 Barcode	total: 0	_				<u> </u>	
[tems	Branch	Collection	Shelf Location	Material Type	Loan Period	Fine Code	Stat Code	Owner	Template .
1	Illinois Heartla	General Collec	(None)	Book	Book	Book	(None)	Illinois Heartla	IHLS Edwardsville Bool .
			[ОК	Cancel	Hel	p		

📕 New I	tem Record 1 -	Cataloging - Polaris		
File Edit	View Links T	Tools Help		
p	Barcode:	Record s	s: 🔽 🗖 ILL 🗖 Ebo	ook 🔲 Non-circulating 🔽 Display in PAC
or	Title:	Of mice and men	Fir	Bib control no.: 2293152
SC C	Author:	Steinbeck, John, 1902-1968.	Parent item:	Item control no.:
R.	Call number:	FIC STE C. 2	Price:	Issue control no.:
m	Owner:	Illinois Heartland Library System - Edwardsville	Shelf location: (None)	T
Ite	Assigned:	Illinois Heartland Library System - Edwardsville	is) Temporary location:	
a	Collection:	General Collection (gencoll)	Circulation status: In-Proce	ess
- 5	Circulation para	ameters	Call number	Request
FRI	Material typ	e: Book	Scheme: Dewey Decimal	- Loanable
	Loan period:	Book	Prefix: FIC	outside system
4	Louin periodi			I▼ Holdable
=	Fine code:	Book	Class:	Limit to:
B	Renewal limi	it: 2 🛋	Cutter: STE	Pickup at this branch
			Suffix:	Patrons from this
	Stat code:	(None)	Vol:	Patrons from this branch only
	Name of piece:	:		
		,	Copy: C. 2	Preterred borrowers
	Issue:			
For Help, p	press F1		IHLS Edwardsville Book	NUM

To Input information Directly from a Template: (Good for Known Control no.)

1. Search for item template.

Item Template 68 - Cataloging - Polaris File Edit View Links Tools Help	
Template Name: IHLS Edwardsville Book	Template owner: Illinois Heartland Library System - Edwardsville (br)
Author:	Find Bib control no.:
Call number: Call	r) ▼ Shelf location: (None) ▼
Assigned: Illinois Heartland Library System - Edwardsville (z Collection: General Collection (gencoll)	eds) Temporary location: Circulation status: In-Process
Circulation parameters Material type: Book Loan period: Book	Call number Scheme: Dewey Decimal Prefix: Call visual Canable Council Canable
Fine code: Book	Class: Holdable
Stat code: (None)	Vol: Patrons from this library and branches Copy: Patrons from this branch only
Home branch: Illinois Heartland Library System - Edv 💌	Do not float
	NUM

- 2. Choose Tools, Create Item Records. Don't forget this part or you will overlay and save on template!!
- 3. Input control number of the bibliographic record or click Find to search for a record.
- 4. Input information as before and save.

You have the data file – now what do you do – Importing in Polaris

1. From main Polaris Toolbar, choose Utilities. Click on Importing, Express Import.

mport profile: IHLS OCLC Import			
Profile Name	Description	Creator	
Acquisitions Bibs	For Bib records from vendor selection tools (read only)	PolarisExec	
Authority Update Import	Authority Update Import profile (read only)	PolarisExec	
Enriched EDI Orders	Enriched EDI Orders (read only)	PolarisExec	
gmab	Polaris default import profile (read only)	PolTrainer2	_
HLS OCLC Import	Regular OCLC Record importer.	jbauer	
integrated ebook Bibs	This is the default profile for imported bib records for ebooks that will	PolarisExec	
Pinsley MARC	Regular OCLC Record importer.	PolTrainer1	
Polaris default	Polaris default import profile (read only)	PolarisExec	_
Polaris default (with item creation)			
mport files: 0 files selected	Polans default with item creation (read only)	PolarisExec	
mport files: 0 files selected	Polars default with item creation (read only)	PolarisExec	dd Move
mport files: 0 files selected	Polars default with item creation (read only)	A	dd

- 2. Highlight IHLS OCLC Import from the Import profile list.
- 3. Click on the ADD... button in the lower part of the screen /
- 4. A screen like the following will appear:



- 5. Highlight the appropriate drive in the left hand sidebar (usually E or F).
- 6. Next change the file extension to data files from the dropdown menu.
- 7. Then highlight the OCLC data file that you wish to import.
- 8. Click Open.
- 9. Now the Import screen will add your file to the list as seen below.

Polaris Cataloging Handouts

mport profile: Pinsley MARC		
Profile Name	Description	Creator
Acquisitions Bibs	For Bib records from vendor selection tools (read only)	PolarisExec
Authority Update Import	Authority Update Import profile (read only)	PolarisExec
nriched EDI Ordens	Enriched EDI Orders (read only)	PolarisExec
mab	Polaris default import profile (read only)	PolTrainer2
ntegrated ebook Bibs	This is the default profile for imported bib records for ebooks that will r	PolarisExec
insley MARC	Regular OCLC Record importer.	PolTrainer1
olaris default	Polaris default import profile (read only)	PolarisExec
olaris default (with item creation)	Polaris default with item creation (read only)	PolarisExec
VhippoMARC	Regular OCLC Record Import	vwhippo
neart film 1 flag adapted		
mport files: 1 files selected tsclient\jE\joancat. dat		Add Remove

10. Now click on Record Sets tab.

Save to permecord set	Final
Save to permission set	
	Save to new record set
mr. LJP_Final Find C Append	Name: Find C Append
ns: SHARE (sys)	Owner: C Replace
isional	Provisional
Save to new record set	Save to new record set
ne: LJP_Problems	Name: C Append
er: SHARE (sys)	Owner: C Replace
ted	Deleted
Save to existing record set	Save to new record set
ne: LJP_Deleted	Name: Append
er: SHARE (sys)	Owner:
Record Set	
	Provisional
Save to new record set	Save to new record set
ne: Find C Append	Name: Find C Append
	C Replace

- 11. Rename all three record sets to your initials, and you as owner. For example: JCB_Final, JCB_Problems, and JCB_Deleted would be the names for the record sets; owner would be jbauer. Please note, one can reuse the same record set by clicking the Save to existing record set and either Append or Replace.
- 12. Click Import.
- 13. A new screen will pop up that says:

Your files have been submitted for importing. Refresh the import job queue periodically to track the job status.

14. Click OKAY.

The Import Job Queue screen will pop up and the list of import jobs will be displayed, with the file name highlighted. Status may be Processing or Completed.

	📴 Import Jobs Queue											
	File Edit View	Tools Help										
🖴 🗙 🚺 💷 Report 😰												
ſ	Path	File	Orga	User	Work	Туре	Status	Record	Record	Posted	Scheduled	
	\\tsclient\E\j	joancat.dat	Illinois	jbauer	RPLS	Biblio	Completed	2	2	1/23/201		
	\\tsclient\E\	Cheri's exp	Illinois	cfaust	cherisf	Biblio	Completed	6	5	1/23/201		
	\\tsclient\E\	upload_file	Illinois	jwang	leslieb	Biblio	Completed	3	3	1/23/201		
	\\tsclient\C\	OCLC test	Illinois	vandr	vincenta	Biblio	Completed	4	4	1/23/201		
	\\tsclient\E\	MARC reco	Illinois	eelliott	cat	Biblio	Completed	5	5	1/23/201		
	C:\Users\pol	rlc,dat	Illinois	PolTr	Polari	Biblio	Completed	3	3	11/9/201		
	C:\Users\tm	export5.dat	Illinois	tmore	Lear	Biblio	Completed	5	5	11/9/201		
	C:\Users\jb	export8.dat	Illinois	jbauer	RPLS	Biblio	Completed	6	6	11/9/201		
	C:\Users\bo	export7.dat	Illinois	bobert	Puck	Biblio	Completed	5	5	11/9/201		
	C:\Users\mj	export12.dat	Illinois	mjohn	Lucentio	Biblio	Completed	4	4	11/9/201		
	C:\Users\dlo	export6.dat	Illinois	dlottes	Cordelia	Biblio	Completed	5	5	11/9/201		
	C:\Users\pe	export3.dat	Illinois	lperkins	Bianca	Biblio	Completed	5	5	11/9/201		
	C:\Users\sb	export9.dat	Illinois	sbyers	Titania	Biblio	Completed	5	5	11/9/201		
	C:\Users\rbr	export4.dat	Illinois	rbrady	Rinaldo	Biblio	Completed	4	4	11/9/201		
	C:\Users\am	export11.dat	Illinois	amarc	Antonio	Biblio	Completed	4	3	11/9/201		-
F	or Help, press F	1					18 jobs				NU	M //

15. Once Status is Completed, you may press Report to see the Import Report for that job.

Print import reports from the Import Jobs Queue

If you want details regarding a specific import job, you can print an import report in pdf format from the Import Jobs Queue. The Import Jobs Queue lists import jobs for both bibliographic and authority records.

Follow these steps to print details of an import job from the Import Jobs Queue.

1. Select Utilities, Importing, Import Jobs Queue.

The Import Jobs Queue dialog box displays the details for each import job.

2. Double-click the import job you want to print. Or, select the import job and click the **Report** button, or right-click and select **Print Report**.

3. Select File, Print from the menu.

The Import Report pdf appears in the preview window.

4. Select File, Print to print the report displayed in the preview window.

Tip:

Import reports are not saved to the local computer. To save a copy of the report, open the report from the Import Jobs Queue, select **File, Save As,** and type a file name and path.

The record set provides the bib control number for attaching the item. Depending on your workflow and who attaches the barcode from here, you can go to the Final catalog record set, which contains all of your new bibs, highlight each bib, and attach items as shown in previous pages. If someone else attaches, provide the control number.

On Order Records from Bibliographic Templates

There will be on order records for those libraries that are using acquisitions. For cataloging libraries that are not using acquisitions and would like to add a brief ON ORDER record, do the following:

- 1. After double checking to make sure not already in system, Click NEW paper.
- 2. Highlight Bibliographic Record
- 3. Existing Bibliographic Template
- 4. On Order for format these templates will be SHARE and SHARE staff will maintain.

Polaris ILS 4.1.736 - jbauer	r (IHLS - C loging Pat	a rtervi l ron Serv	l le (ZC / ices C	4)] iirculatio	on a			
		P0	14 14	a 🕌 a 🛃	R			
Ne.					X			
Objects View: All Objects		•		ОК				
Authority Record Authority Template			C	ancel				
Bibliographic Record Bibliographic Template Branch				Help				
Collection Course Reserve		•	Tem	plate <	<			
Choose Template					_			
C No Template								
 Use Default Template Existing Template 								
Name	Owner							
Default - Video Recording (SHARE							
Edwardsville PL On-Order	Edwardsvil	le Public	Library					
Hayner PLD On-Order Record Hayner PLD (Alton)								
IHLS Edwardsville On-Orde	Illinois Hea	rtland Li	brary S.					
Tri-Township PLD On-Order	Tri-Townsh	nip Public	: Librar.	•				
Make session default								

5. Press OKAY.

File Edit	View L	inks Tool	s Help	
		┨₿	· X 🛛 🕹 🖻 🖛 🕿 🔚 🗖 🕰 🗐 🕰 😭 😭	
Record	Control I Title:	number:	Owner: SHARE (sys) Record status: [TITLE ALL IN CAPS]	Display in PAC
🎽 🛎 😴 📓 Bibliographic F	LDR 008 020 100 245 260 500 690 945	1 10	nam 22 5 4500 1302185	
For Help, pr	ress F1		IHLS Edwardsville On-Order Record	NUM ///

- 6. Input needed information
- 7. Save
- 8. Attach ON ORDER item from template, changing what is needed.
- 9. If ON ORDER bib is already in system, attach ON ORDER item from template.

On the Fly

When an item is returned to the library that was circulated ON THE FLY, it will need to be cataloged. Best to wait a day to do these, as system will delete ON THE FLY items and bibs from the database every night with day end computer run. Next day, first double check that ON THE FLY RECORD has been deleted by searching by barcode. Then search for a good matching record as you would anything else and attach. If hasn't deleted out of system after a day, contact us, we may need to tweak process.

Delete item records

Follow these steps to delete item records.

- 1. Use one of the following methods to delete item records:
 - To delete a record displayed in a workform, select **File, Delete** on the workform or press X.

🔄 Item	Record 55019	00 - Cataloging - Polaris
File Ed	it View Links	Tools He
\square		≝(X)⊗ 🛡 👽 🖻 🖳 🗠 💦 🟐 🚠 🖻 😰
q	Barcode:	B120500 CC-094 Record status: Final □ ILL □ Ebook □ Non-circulating ✓ Display in PAC
uo	Title:	The grapes of wrath ; The moon is down ; Cannery row ; East of Eden ; Of mice and me Find Bib control no.: 906844
6 C	Author:	Steinbeck, John, 1902-1968. Parent item: Item control no.: 5501900
R	Call number:	F Ste Price: \$16.00 Issue control:
шe	Owner:	Danville Public Library (DANP-ZCH) (br)
It€	Assigned:	Danville Public Library (DANP-ZCH) (danp)
æ	Collection:	(None) Circulation status: In
5	Circulation par	ameters Call number Request
	Material ty	Pee: Book Scheme: Dewey Decimal Loanable
2	Loan period	I: Book
5	Fine code:	Book
R	Renewal lin	it: 1 📩 Cutter: Ste
	Stat code:	None) Suffix: Patrons from this library and branches
		Vol: Patrons from this branch only
	Name of piece	Copy: Preferred borrowers
	Iccue:	
	15506.	
For Help	press E1	NUM

• To delete a record directly from the Find Tool results list, right-click the record, and select **Delete** from the context menu.

• To delete from a linked item list, press the X

🕑 Bibliographic Record 906844 : Linked Item Records											
File Edit Help											
	?										
Title Assigned Collection	Mate Shelf	Call Nu Vo	Sta	Barcode	Last Activi R	Contr					
The grapes of wr Danville	Book	F Ste	In	31205001762994	6/6/2011 F	5501900					
The grapes of wr Fairfield	Book	STE	In	30183032745232	2/1/2012 F	2930414					
The grapes of wr Paxton C	Book	F STE	Out	31783000024509	7/11/2012 F	5420299					
The grapes of wr St. Elmo	Book	Ste	In	30183034223071	11/29/2007 F	2854839					
For Help, press F1		4 re	cords			NUM //.					

2. If you are deleting multiple item records, the Multiple Deletion dialog box appears.

Fik P Bibliographic Record 2981511 : Linked Item Records X	
Title Assigned Collection Mate Shelf Call Nu Vo Sta Barcode Last Activi R. Contr Famous America Benton H Famous America Carbond F. 2857966 0 1/1/1900 F 2857966 0 1/1/1900 F 433273 Famous America Carbond Famous America Centralia F. 436677 2 1/1/1900 F 4436677 Famous America Centralia Famous America Centralia F. 40202011 F 4027806 Famous America Mt Verno For eakable links 9 9/6/2005 F 306912 Famous America Mt Verno Yes No Help 31 3/29/2004 F 4080463	Inal V Display in PAC
For Help, press F1 10 records NUM //	
490 1 *arme Laurer drama series 505 0 #aAwake and sing! / Clifford Odets End of summer / S. N. Behrman Idiot's delight / Robert E. Sherw John Steinbeck The time of your life / William Saroyan. 650 0 #aAmerican drama*y20th century. 700 1 #aOdets, Clifford,#d1906-1963.#tAwake and sing! 700 1 #aOdets, Clifford,#d1906-1963.#tAwake and sing! 700 1 #aBehrman, S. N.*q(Samuel Nathaniel),#d1893-1973.#tEnd of summer. 700 1 #aSherwood, Robert E.*q(Robert Emmet),#d1896-1955.#tIdiot's delight. 700 1 #aSteinbeck, John,#d1902-1968.#tOf mice and men. 700 1 #aClurman, Harold,#d1901-1980. 830 0 #aLaurel drama series. 704 #aLaurel drama series. *a244660	vood Of mice and men /

3. Click **Yes** to delete the selected records. If you decide not to delete the record, click **No** or close the dialog box.

If a record you are deleting is the last record linked to another record or records, the Last Copy Options dialog box appears.

4. If the Last Copy Options dialog box appears, select one of the following options:

- Click **Delete** to delete the record if it does not have unbreakable links or other conditions that prevent deletion.
- Click Suppress From PAC to retain the record but prevent it from appearing in the PAC
- Click Retain to retain the record without changes.

There is a difference between delete and • **Withdrawn**, which means the item has been removed from the circulating collection. It is not available for check-out or request.

Making Item Templates

You will need item templates for adding items to bibliographic records. These are easy to reproduce and customize for your own library. Remember, you will only see item templates for your library (or libraries).

1. New Paper icon. Choose Item Template.

New Objects View: All Objects Item Record Item Template Library Patron Record Permission Group Purchase Order Purge Criteria	Ск Сancel Help Template >>
Item Template 1 - Cataloging - Polaris Fle Edit View Links Tools Help Image: State of the state of th	Template owner: jbauer Figd Bib control no.: Non-circulating Parent item: V Display in PAC Price: V
Assigned: Illinois Heartland Library System - Carterville (ZCA Collection: (None) Crculation parameters Material type: (None) Loan period: (None) Fine code: (None) Renewal limit: Stat code: (None) Name of piece: Home branch: Illinois Heartland Library System - Car V	S) ▼ Temporary location: ▼ Circulation status: In-Process Call number Scheme: (None) Prefix: ✓ Loanable Class: ✓ Loanable Cutter: ✓ Holdable Limit to: Produp at this branch Patrons from this library and branches Patrons from this branch only © Preferred borrowers

- 2. Fill in Name start with your Library Code then type of material/level.
- 3. Fill in Material Type, Loan period, Fine code, Stat code, Collection, etc.--all the consistent information.
- 4. Save.

You will probably want an item template for type of material and level, example Juvenile Fiction, Country Western CD, etc.

To Copy an existing item template:

1. Call up existing template. Chose FILE, NEW.

Item Template 68 - Cataloging - Polaris	
File Edit View Links Tools Help	
	New Item Template
Template Name: IHLS Edwardsville Book THe:	Copy Existing Work Form Cancel Help
Author:	
Owner: Illinois Heartland Library System - Edwardsville (Assigned: Illinois Heartland Library System - Edwardsville (Collection: General Collection (gencoll)	(br) Shelf location: (None) (zeds) Temporary location: Circulation status: In-Process
Circulation parameters Material type: Book Loan period: Book Fine code: Book Renewal limit: 2 Stat code: (None) Name of piece:	Call number Dewey Decimal Request Scheme: Dewey Decimal Image: Loanable outside system Prefix: Image: Loanable outside system Class: Image: Loanable outside system Class: Image: Loanable outside system Cutter: Image: Loanable outside system Suffix: Image: Loanable outside system Vol: Image: Loanable outside system Copy: Image: Loanable outside system Image: Loanable outside system Image: Loanable outside system
Home branch: Illinois Heartland Library System - Edv	Do not float
For Help, press F1	NUM

2. Screen pops up to Copy Existing Work Form – Click OK. Generic information is copied over and you have less to change.

Catalog Record Sets

Record sets allow you to group records together to print a list, make bulk changes, mass delete items, etc. Record sets can be item, bibliographic or authority. You will deal primarily with item, but if you are doing displays or collection development, bibliographic records sets are useful.

To make a record set:

1. Choose the New (piece of paper) icon and Record Set from the menu.

Polaris ILS 4.1.736 - jbauer [IHLS - Carterv File Acquisitions Serials Cataloging Patron Ser	ille (ZCA)] vices Circulation Ac		
New Objects View: All Objects	<u>o</u> k	New Record Set	ОК
Permission Group Purchase Order Purge Criteria Quick-circ Item Record Record Set	<u>C</u> ancel <u>H</u> elp		Cancel Help
Reserve Item Template Resource Group	Template >>		

- 2. Choose type of record.
- 3. Input name; change owner to your branch if you wish to share with others.

New	Record Se	t 1 - Polaris											_ 🗆 🗙
File Ed	lit View T	ools Help											
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set	Name:	1				Owner	jbauer					Record type: Item	
	Note:											Number of records:	0
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še	Title		Assigne	Collec	Materi	Shelf	Call N	Vol	Status	Barcode		Last Activity R 0	Control
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For Help,	press F1										0	of 0 record(s) retrieved	11.

4. From the Cool Bar, choose the Add by Barcode or Add by Find. If by barcode, scan in your items. If by find, look up the items you need by doing a search.

🕽 Item Records - Barcode Find Tool												
File Edit Tools Options Help												
General Settings Scoping Branches Collections Databases												
Object: Item Records												
Them Records					Normal	Stop	1					
Search by: Barcode		Value:			C Power		_					
Type: Exact match (explici	tly truncated)	-			C SQL	New Sea	rch					
						Clear	1					
Sort by: (None)		<u>_</u>		L	Count Only							
For: 31202*		-				Help						
,		-										
Title Assig	Colle Mate	Shelf Call V	Status	Barcode	Last Activi	R Co						
How baseball works Decat	Juve Book	J796	In	31202007525	6/30/2012	F 2						
Attack of the killer vi Decat	Juve Book	J778	In	31202007525	1/25/2010	F 86						
Profit. The complete Decat	DVD DVD	DVD	In	31202007691	7/3/2012	F 87						
Hidden Mountain Decat	Juve Book	J-pb	In	31202007390	9/15/2008	F 87						
Werewolves don't r Decat	Juve Book	J-pb	In	31202007390	6/11/2012	F 87						
The mystery of the Decat	Juve Book	J-pb	In	31202007390	6/16/2012	F 87						
Angel : love and death Decat	Youn Book	V-ob	In	31202007382	8/21/2010	F 87						
Book of the dead Decat	Youn Book	Select	n	31202007382	6/1/2011	F 87						
Dearest Debbie: In Decat	Non Book	Open	n	31202000000	11/3/2009	F 87						
Rashomon, and oth Decat	Fictio Book		n	31202000000	10/16/2010	F 87						
Run scared. Decat	Fictio Book	Properties	; n	31202000000	5/6/2009	F 87						
Inspector Ghote cau Decat	Myst Book	Fictio	In	31202000000	10/30/2009	F 87						
Where the lost April Decat	Fictio Book	Fiction	In	31202000000	10/25/2011	F 87						
The Heatherton heri Decat	Fictio Book	Fiction	In	31202000000	3/4/2012	F 87						
Under the eve of th Decat	Fictio Book	Fiction	In	31202000000	8/14/2007	F 87						
A white bird flying Decat	Fictio Book	Fiction	In	31202000001	5/15/2012	F 87						
			-									
one Close on Select 32 of 10000 record												

5. Highlight the desired barcodes, right click and select. Record set is populated and now you can save.

As with everything in Polaris, there are at least 3 ways to do everything. Making record sets are not exception. Find the way that works the best for you.

Item Record sets and bulk change

Bulk change item records

You can gather items for bulk change in a record set, and then bulk change them. Or, you can bulk change items by selecting them in a linked list box from a bibliographic record

1. Select the item records to change, and open the Bulk Change dialog box using one of the following methods:

Tip:You can create an item record set from a bibliographic record set by clicking on the Bibliographic Record Set workform. The item record set will contain all the items linked to the bibliographic records in the record set.

a) If the items are in a record set, open the record set, and select **Tools, Bulk Change**, press **CTRL+B.**

b) If the items you want to change are not in a record set, access the item linked list box by one of the following methods:

- Select **Links, Item records** from the workform menu on the Bibliographic Record, Purchase Order, or Purchase Order Line Item workform.
- Select a purchase order line item from the Purchase Order workform, Line Items view, or from the Find Tool results list, right-click and select **Links, Item Records** from the context menu.
- Select a segment in the Purchase Order Line Item workform, right-click and select **Links, Item records** from the context menu.

Then, select the items to bulk change in the item list box, right-click and select **Ad hoc Bulk Change**.

The Bulk Change dialog box appears.

Ele Edit View Tools Help														
set	Name: Record set to demo bulk change Owner: jbauer									 Record ty 	/pe: [i	Item		
Record S	Note:	te:									Number of records: 26			
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	Title	Assign	Collec	Materi	Shelf	Call N	Vol	Status	Barcode	Last Activity	R	Contro	. 🔺	
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	Assault with a deadl	Decatu	Non-F	Book		364.1		In	31202000386628	1/28/2002	F	90578		
E	Blind ambition : the	Decatu	Non-F	Book		364.1		In	31202000132576	9/6/2006	F	88435		
Ū	Bondage; the slave t	Decatu	Non-F	Book		364.1		In	31202000180187	9/13/2000	F	88799		
12	Bothersome bodies	Decatu	Non-F	Book		364.1		In	31202000302625	7/14/2012	F	89817		
	The business of murder	Decatu	Non-F	Book		364.15 L		In	31202000288899	1/26/2012	F	89755		
RS	Capital punishment,	Decatu	Non-F	Book		364.66 J		In	31202000231360	9/11/2007	F	89246		
	Controlling delinquen	Decatu	Non-F	Book		364.4 W		In	31202000042734	6/6/2006	F	87809		
	The death of a Presi	Decatu	Non-F	Book		364.1		In	31202000318852	1/25/2012	F	89942		
	The Dillinger days.	Decatu	Non-F	Book		364.1 T		In	31202000368196	9/7/2000	F	90416		
	The growth of crime	Decatu	Non-F	Book		364 R		In	31202000177886	9/7/2000	F	88787		
	Introduction to crimi	Decatu	Non-F	Book		364 S		In	31202000412176	6/1/2012	F	90769		
	Murder and its motiv	Decatu	Non-F	Book		364.15 J		In	31202000384136	10/14/2010	F	90572		
	Murder parade.	Decatu	Non-F	Book		364.1		In	31202000296777	6/27/2005	F	89788		
	My prisoner	Decatu	Non-F	Book		364.1		In	31202000370564	4/9/2009	F	90440		
	Odyssey of terror	Decatu	Non-F	Book		364.1		In	31202000137328	5/10/2006	F	88472	-1	
	her and a second states of	N	Mare P	na al-		004.4		T	21202000111027	2/0/2000	-	00000		
The record set was saved successfully.								26 of 26 record(s) retrieved						

Item Record Bulk Change -	Number of records: 26
Location Circulation Call N	umber Notes/Blocks Misc Report/Record Set
Owner:	<u> </u>
Assigned branch:	X
Assigned collection:	<u> </u>
Shelf location:	Y
Home branch:	<u> </u>
Temporary location:	
	OK Cancel Help

2. Select one of the following tabs to change fields for all the item records in the record set or for all the items selected in the linked list box:

a) Location - Use this tab to change the item records' location information.

• To change the items' location information, select the **Owner**, **Assigned branch**, **Assigned collection**, **Shelf location**, or **Home branch** box, and select a corresponding value from the list.

• To enter a temporary location for the items, select **Temporary location**, and type the location. If you leave the text field blank, the **Temporary location** will be blank in all the item records in the record set.

b) Circulation - Use this tab to change the item records' circulation information.

• To change basic circulation information, select the **Circulation status**, **Material type**, **Loan period code**, **Fine code**, **Statistical code**, or **Renewal limit** box and select a corresponding value from the list.

• To allow or disallow holds on the items, select the **Holdable** box. Then, select the check box to allow holds on the items, or leave the check box blank to prevent holds on the items.

• To change hold limits, select the **Holdable** box and select the check box to allow holds. Then, select one of the hold limit settings, and select the check box to the right of the setting to limit the holds, or leave the right check box empty to deselect the limit

Example:

To allow all items in the record set to be held and then picked up at any library, select the **Holdable** check box, select **Pickup at this branch**, but leave the check box to the right empty. This will clear the **Pickup at this branch** setting for all items in the record set that have this limit setting selected.

• To change the **Non circulating** setting for all item records, select the **Non circulating** box, and either select the check box to the right or leave it blank. If you select the check box, all the items in the record set will not circulate. If you leave the check box blank, all the items will have the **Non circulating** check box unchecked, allowing them to circulate.

c) **Call Number** - Use this tab to change the item records' call number information, or to assign call numbers to the item records.

d) Notes/Blocks - Use this tab to change the item records' notes and blocks.

• To change the notes information for all item records in the record set, select **Public note**, **Non-public note**, or **Physical condition**, and type the text in the box to the right of the note you selected. Then, select **Replace** to replace any existing notes with the note you typed, **Prepend** to add the notes to the beginning of any existing notes, or **Append** to add the notes to the end of any existing notes.

• To change a library-assigned block, select the **Library assigned** check box, and select a value from the list box to the right.

• To change a free-text block, select the **Free text block** check box, and type the text for the free-text block you want to add. Then, select **Replace** to replace the text for any free-text blocks, **Prepend** to add the text to the beginning of any existing free-text blocks, or **Append** to add the text to the end of any existing free-text blocks.

e) **Misc** - Use this tab to change miscellaneous information on the item records, or to assign barcodes to items that do not have a barcode.

• To change the **Display in PAC** setting for all item records in the record set, select the **Display in PAC** box, and select the check box to the right, or leave it blank. If you select the check box, all the item records will have the **Display in PAC** setting checked, which means they will all display in the PAC. If you leave the check box blank, all the item records will have the **Display in PAC** setting unchecked, which means none of the items will display in the PAC.

• To change the funding source for all the item records in the record set, select **Funding source**, and type a value. If you leave the text field blank, the **Funding source** field will be blank in all items in the record set.

• To change the price of all the items, select **Price** and type the price. If you leave the text field blank, the **Price** field will be blank in all the items in the record set.

3. Click **Report/Record Set** tab to specify the bulk change report and error record set.

a) If you want to change the default report name, type the location and file name, or click **Browse** to locate the file. The default report name

The report also shows errors for items that could not be bulk changed either due to their status or lack of permissions.

b) To create a record set of the items for which the changes could not be made, select the box under **Error Record Set**, type a name for the record set in the **Name** box and select an owner in the **Owner** box.

Note:

An error record set is not required. However, specifying an error record set makes it easier to locate the item records that have errors. If no errors are found, no error record set is created.

4. Click **OK** or press **Enter** to start the bulk change process.

The Summary of Changes message box displays the following details:

- The number of item records to be changed
- The name and owner of the record set that contains the item records being changed
- The error record set name and owner, if the error record set is requested
- The path and file name specified for the bulk change report
- A summary of all the fields to be changed and their new values

Tip:

To return to the Item Record Bulk Change dialog box to change any of your settings, click **Cancel**.

5. Click **Continue**.

The bulk change process applies the changes to the item records. A message informs you when the bulk change process is finished and indicates if there were errors.

6. Click **OK** to close the message box.

After the bulk change process, the list display is updated as follows depending on whether changed the items from a record set or from a list:

• **Record set** - The record set workform is refreshed and sorted by the default sort order. You can re-sort the list in barcode order.

• Item list using Ad hoc Bulk Change - The list view is refreshed immediately after the Ad hoc Bulk Change, and you can see the results of the bulk change to fields that display in the list view. If the bib control number was changed, the new title displays in the list view.