NAVIGATION AND SEARCHING

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NAVIGATION IN POLARIS

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Menu Bar

When you first logon to Polaris, you will know that you have been successful in connecting to the database by the Menu Bar. In the top left corner of your desktop, it should state the Polaris version, your logon, and your default location.

Navigation in Polaris can be accomplished in four ways: drop down menus, icons, shortcut keys and function keys. All four options are available for each logon.

Drop Down Menus (Shortcut Bar)

Clicking on each title in the menu bar presents a drop-down menu to access functions in each subsystem such as Acquisitions, Serials, Cataloging or Circulation. Whether or not you have access to all of these subsystems is based on your privilege level given by your director.
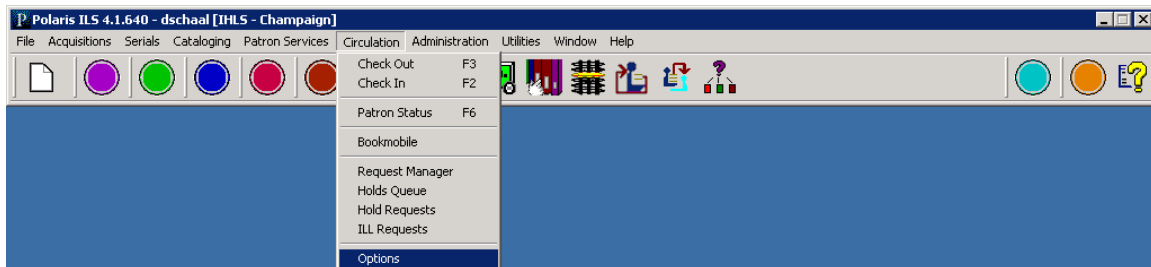
Icons

Another way to access the Polaris subsystems is to click on the corresponding icons in the tool bar. Hovering over each icon brings up a tool tip. The tool tip shows you what

function that icon accesses when clicked. Clicking on a round marble "slides open" the subsystem's menu to present the related icons.

Marble   Tool Tip
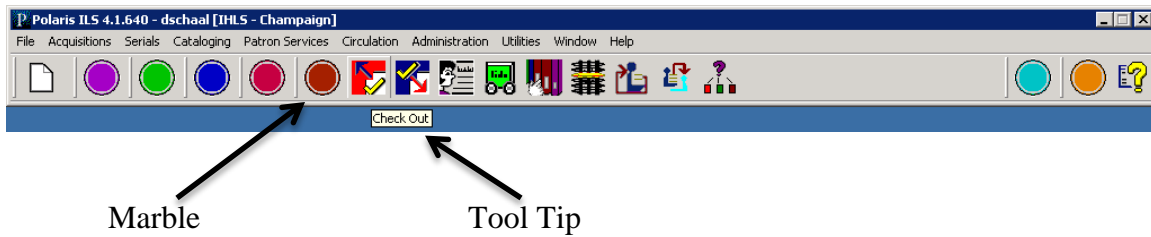
Shortcut Keys

For users familiar with Windows shortcuts, many are built in to Polaris. Numerous CTRL and ALT combinations can open menus and workforms in Polaris. Keyboard shortcut cheat sheets for patron services and circulation can be found in Appendix A of this manual.

Function Keys

Polaris also utilizes function keys. You will find these keys located at the top of your keyboard. Most standard computer keyboards contain F1-F12. Polaris utilizes function keys to open menus and workforms. Function Keys are also listed in Appendix A.

Linking in Polaris

One of the fastest ways to move around in Polaris is by linking from one record to another either from a result set in the **Find Tool** – right-click and choose *Links* from the context menu; or from a workform – go to **Links** in the Shortcut Bar. You can link to other workforms or perform specific functions without additional keystrokes.

In the example below, a search was performed for the title, "The Cat and the Hat". By right clicking on the title, selecting Links, you can quickly link to more information about this title such as the items attached or the hold queue.

Title	Author	Format	Linke...	Holds	Publicati...	Call Number	Control Nu...
The cat in the hat	Seuss, Dr.	Book	71	1	1957	E SEU	41202
The cat in the hat	Seuss, Dr.	Book + Cas...	2	0	1987	813.54 Seu	145666
The cat in the hat		Electronic R...	1	0	1997	371.337	244422
The cat in the hat	Seuss, Dr.	Book	1	0	1985	813.54	333388
The cat in the hat	Seuss, Dr.	Book	61	0	1985	813.54	353593
The cat in the hat	Seuss, Dr.	Electronic R...	2	0	1999	371.337	362978
The cat in the hat	Seuss, Dr.	Book	1	0	1957	816	383322
The cat in the hat		Three Dime...	1	0	2001	791.53	398804
The cat in the hat		Electronic R...	1	0	2001	372.4	518066
The cat in the hat		Electronic R...	3	0	1997	E Se	578487
The cat in the hat comes back!		Book	274	0	1986	E SEU	44032
The cat in the hat comes back		Book + CD	1	0	2003	[E]	732914
The Cat in the hat ; Dr. Seuss on the loose		Videotape	1	0	1985		74133
Cat in the hat hand puppet		Three Dime...	1	0	2000		397820
The cat in the hat knows a lot about that!. Tricks and treats		DVD	12	0	2010	791.45/75	729427
The cat in the hat = Le chat au chapeau : in English and French		Book	1	0	2009	[E]	632900
The cat in the hat Maybe you should fly a jet! Maybe you should be a vet		Videotape	5	0	1997	372.4	510557
The cat in the hat songbook		Book	12	0	1967	774.68 742	75166
Dr. Seuss presents The cat in the hat songbook If I ran the zoo ; Dr. Seus		Music CD	1	0	1999	782.7	503739
Dr. Seuss reading games		Electronic R...	1	0	1999	372.40285	370667
Dr. Seuss' The Cat in the Hat : based on the movie.		Electronic R...	2	0	2003		464644
Dr. Seuss' The cat in the hat Hoober-bloob highway		Videotape	1	0	1996		266267
Dr. Seuss' The cat in the hat : the movie!		Book	13	0	2003	E McC	660882
If I ran the dog show		Book	7	0	2012	599.77/2	744600
Kid's fish hand puppet		Three Dime...	1	0	2000		397823

Context menu:
Open
Place Hold...
Preview
Print
Add to Record Set
Create
Links → Holds Queue
All Hold Requests
Outreach Patrons
Delete
Undelete
Item Records
Properties
Authority Records
Selection List Line Items
Selection Lists
Purchase Order Line Items
Purchase Orders
Invoice Line Items
Invoices
Serial Holdings Records
Standing Order Parts
Subscription Records
Record Sets

If you are in a workform such as the bibliographic record, you can go to Links in the menu bar.

Bibliographic Record 41202 - Statistics - Polaris

File   Edit   View   Links   Tools   Help

Links menu:
Holds Queue
All Hold Requests
Outreach Patrons
Item Records   Ctrl+T
Authority Records
Selection List Line Items
Selection Lists
Purchase Order Line Items
Purchase Orders
Invoice Line Items
Invoices
Serial Holdings Records
Standing Order Parts
Subscription Records
Record Sets

SHARE (sys)   Record status: Final   ☑ Display in PAC
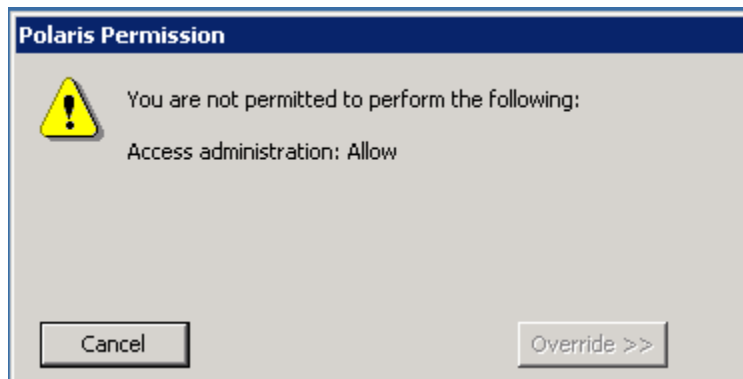   ☐ ILL

Year-to-date circulation: 0   Year-to-date in-house use: 0

Previous year-to-date circulation: 0   Previous year-to-date in-house use: 0

Lifetime circulation: 1427   Lifetime in-house use: 0

Permission Blocks

You may encounter a message that says that you do not have permission to complete a certain task. When given the option to Override, you will need someone with a higher permission to enter their login and password in the appropriate fields and then click OK. If no Override button is available, your library is unable to perform the task in this subsystem.

Polaris Permission

⚠ You are not permitted to perform the following:

Access administration: Allow

[Cancel]   [Override >>]

NOTE! The SHARE's Administrative Services Team, working in conjunction with the director of each SHARE library, grants permissions to each logon. If this is a permission that you frequently need, write down the exact wording of the permission from the pop-up message to give to SHARE's Administrative Services Team.

FIND TOOL

- **Types of Searches**
- **Find Tool Tabs**
- **Searching for Bibliographic Records**
- **Searching for Item Records**
- **Setting User Defaults**
- **Wildcard Characters**
- **Search Results**

Types of Searches

The **Find Tool** has the same format in all Polaris subsystems, but with different options/indexes in the drop-down menus. It allows users to do everything from basic to advanced searching. The three most common searches are: patron searches, bibliographic record searches, and item searches. Patron searches will be discussed in the patron manual.
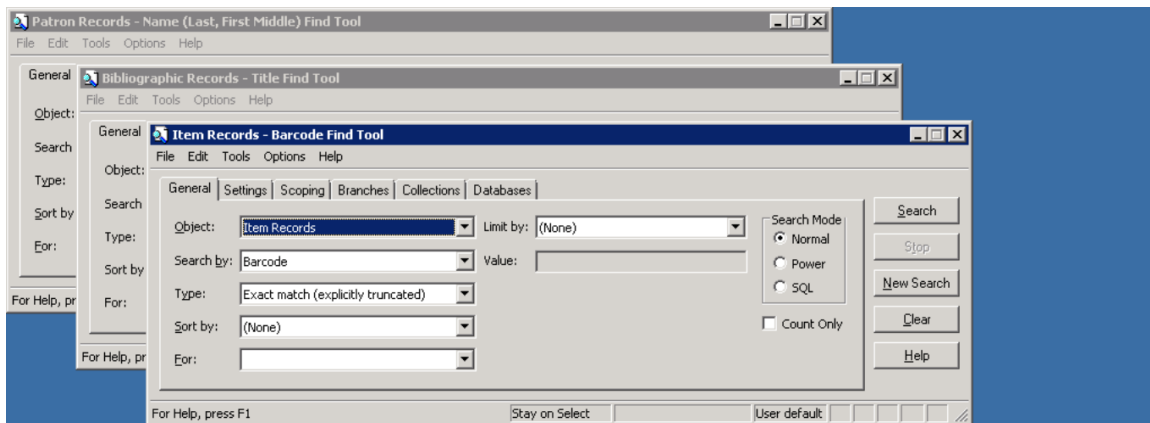
Bibliographic Record and Item Searches

From anywhere in Polaris, you can use the following shortcut keys to bring up the **Find Tool** to search for cataloging records.

- Bibliographic Records – **F12**
- Item Records – **CTRL+ALT+ F9**

Or if you prefer, click on **Cataloging, Bibliographic Records** or **Cataloging, Item Records** in the drop down menu.

Or if you prefer, click on the blue cataloging marble, then either or .

Find Tool Tabs

Each **Find Tool** window has the following tabs:
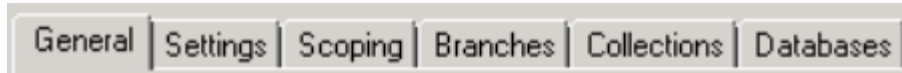
General Tab

The General Tab contains the following options for searching:

- **Object** – default object is selected but this can be changed to any object in the list.
- **Search By** – access point or index
- **Type** – type of search to perform
- **Sort By** – order of the search results
- **For** – enter your search string
- **Limit By** – add a narrowing criterion, if available – some limits allow multiple values to be selected.
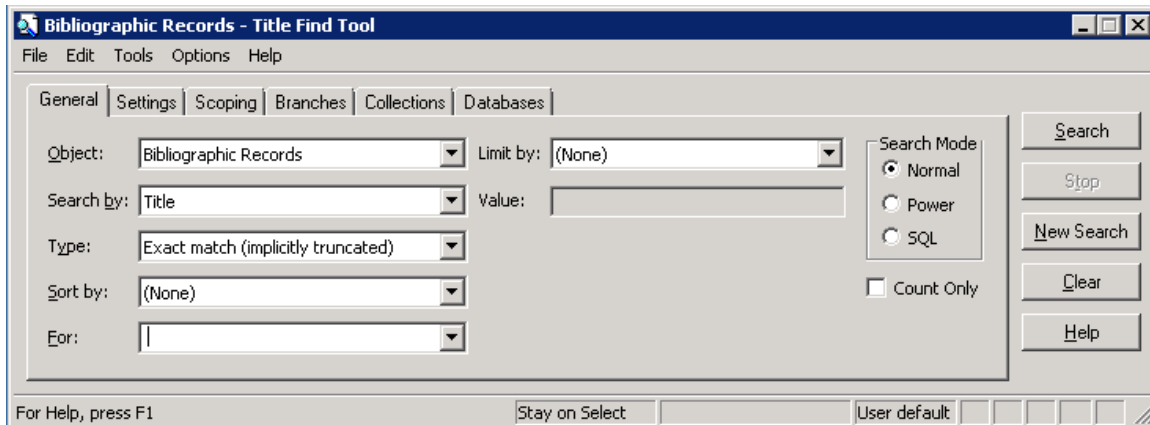
Settings Tab

The Settings Tab contains options for the creation of Record Sets, which is discussed later in this manual. You can also raise the value of the retrieval limit on this screen. This is very useful when the search results go over that value. Example: Retrieving all barcoded items in your library.
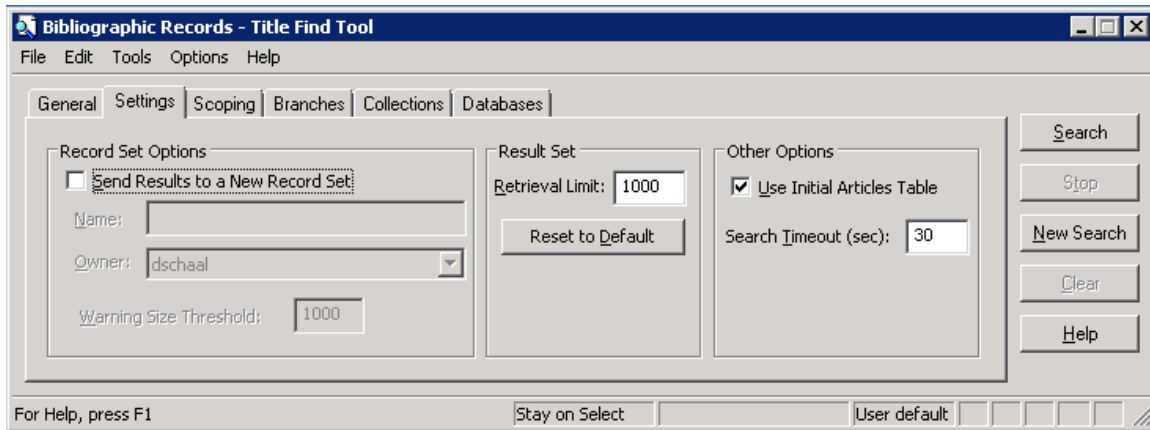
Scoping Tab

You should begin your search on the general tab, and then narrow the search further by using the scoping tab.

The scoping tab includes operators, qualifiers and values. You add the criteria to your search by clicking the [**Add**] button; make your selection; and then click [**Search**]. A qualifier can be changed by highlighting the line in the Current Criteria box, changing it on the left, and then clicking the **[Update]** button. To remove criteria, highlight the line and then click **[Remove].**
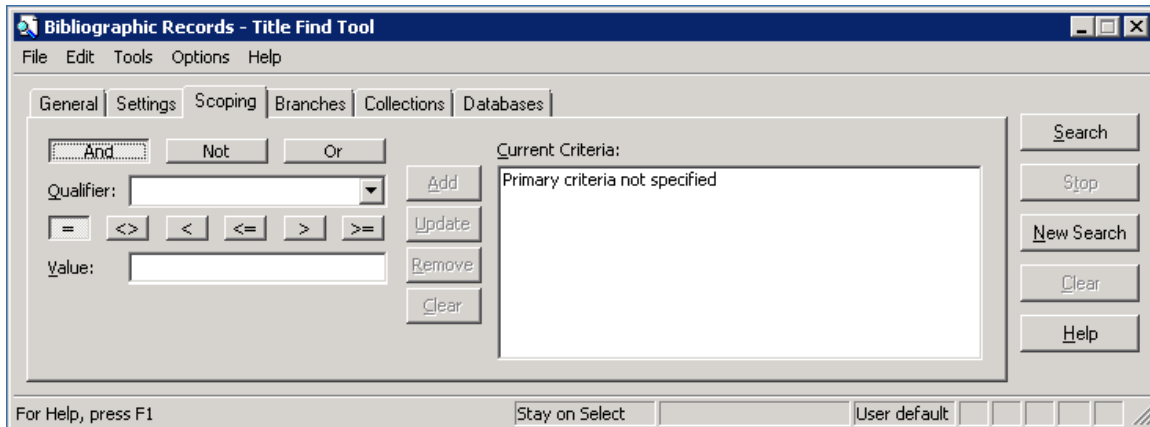
Branches and Collections Tabs

Searches can be narrowed further by opening the branches and/or collection tabs and making additional selections. Since SHARE is such a large consortium, scoping to your branch and/or collections may be a desirable outcome. However, this selection is not available to be saved in the user defaults.

In both the branches and collections tabs, click the **[Unselect All]** to clear all checkmarks. The SHARE lists are very long; it will take a moment to clear all checkmarks.

9
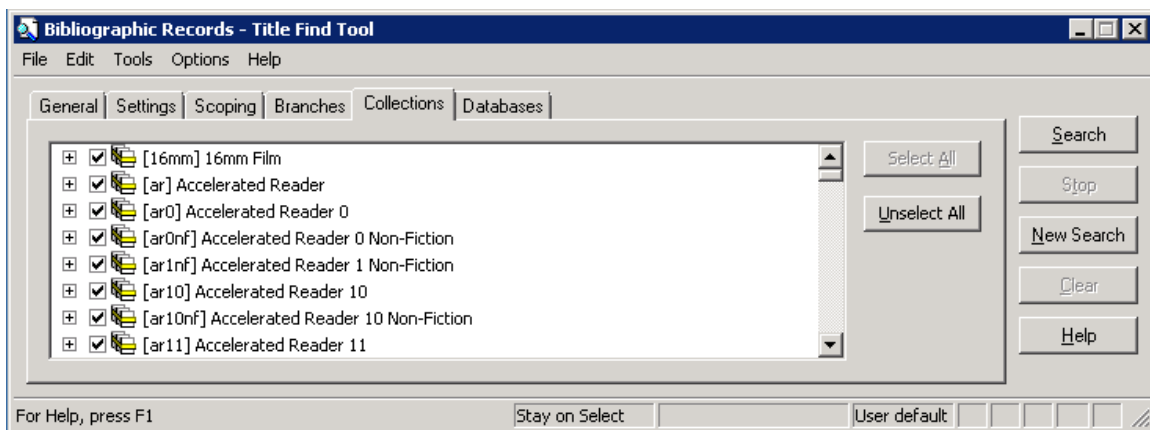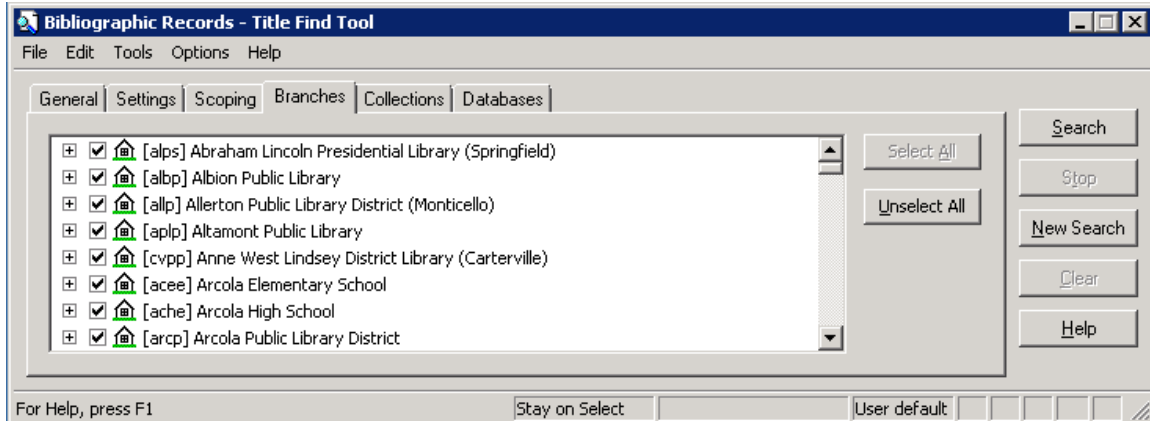
Databases Tab

The Database Tab contains external databases that SHARE can search. Currently, other than the PAC, we are not utilizing this tab.
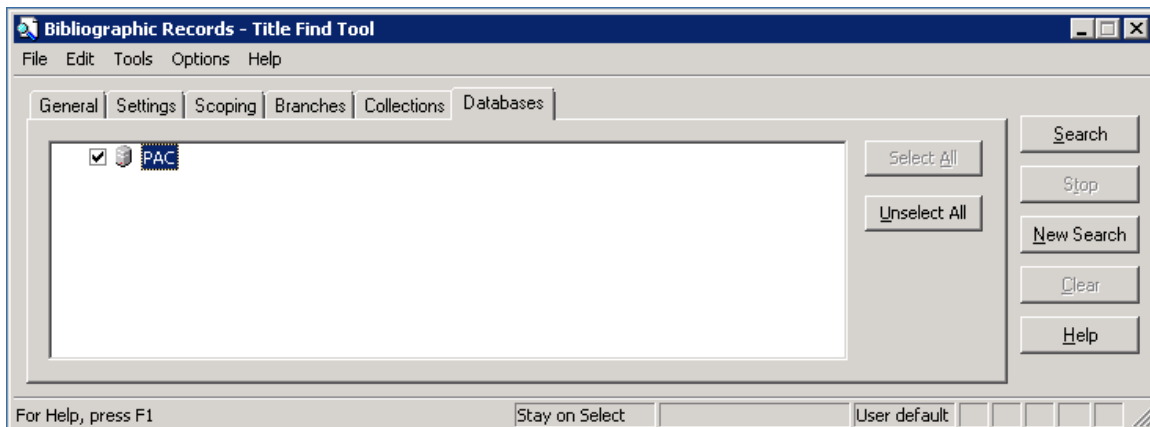
Additional Find Tool Searches

On the **General Tab**, there are 3 other options that you can utilize for a search:

- **Power** – gives the staff the ability to use CCL (Common Command Language) to create a search.
- **SQL** – if permissions are given, allows staff to create, save and run SQL queries within the **Find Tool**.
- **Count Only** – allows staff to get a quick count of records without displaying the results list – helpful for reporting purposes.
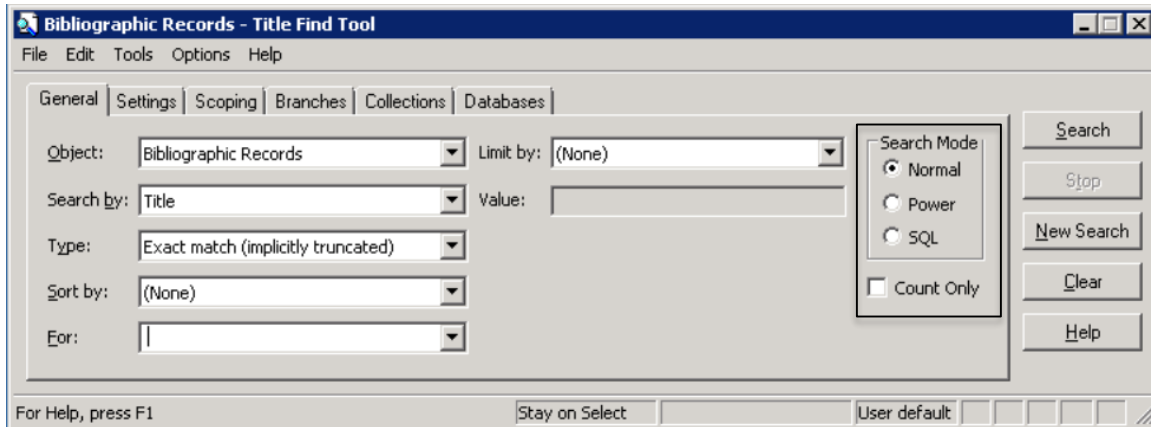
Searching for Bibliographic Records

After launching the bibliographic records search window, under the General Tab, in the drop down *Search By* menu, you can search for bibliographic records by a variety of fields. A few of the most popular would be title, author, subject, barcode and genre.
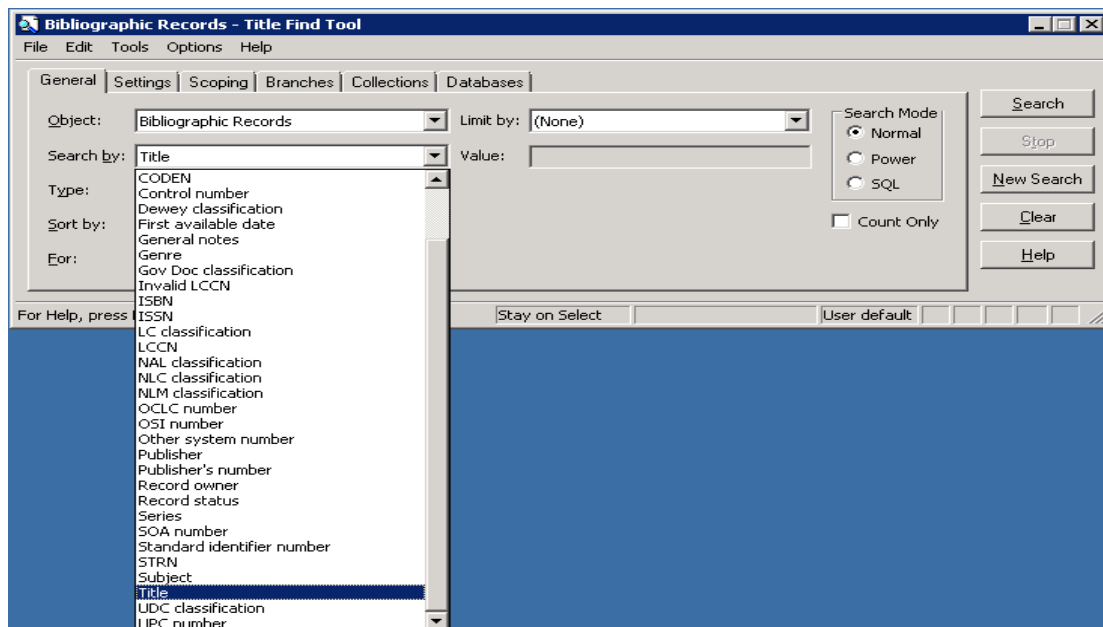
For bibliographic record searches, the type of search changes depending upon the field you have selected to search by. Some of the most common include (but there are others):

- Exact match (implicitly truncated)
- Exact match (explicitly truncated)
- Browse
- Keyword search
- Phrase search

Exact Match (implicitly truncated)

When using the exact match (implicitly truncated) type of search, your search results will display all records beginning with the characters entered in the *For* box, e.g., my title begins with…. There is no need to insert an asterisk after the term; truncation is implied.

Exact Match (explicitly truncated)

When using the exact match (explicitly truncated) type of search, your search results will display only the records that exactly match the characters in the *For* box. If you enter an

asterisk after the search term(s), the results are the same as they would be on an implicitly truncated search. Explicitly truncated searches are helpful for one-word title searches.


Browse

When using the browse type of search, your search results will display the specified index headings beginning with entries that start with text in the *For* box (basically alphabetical). The browse search is Unicode compliant. Diacritics or special characters are accepted if they match the heading. Name indexes are searched in the last name, first name format. You do not have to enter a comma when searching for a name.

The browse mode will also allow you to SEE the different formats for a particular title. In the example below, "The Cat in the Hat" has a title count of 81. The "SEE" lines below the main title break the 81 titles into their respective formats.
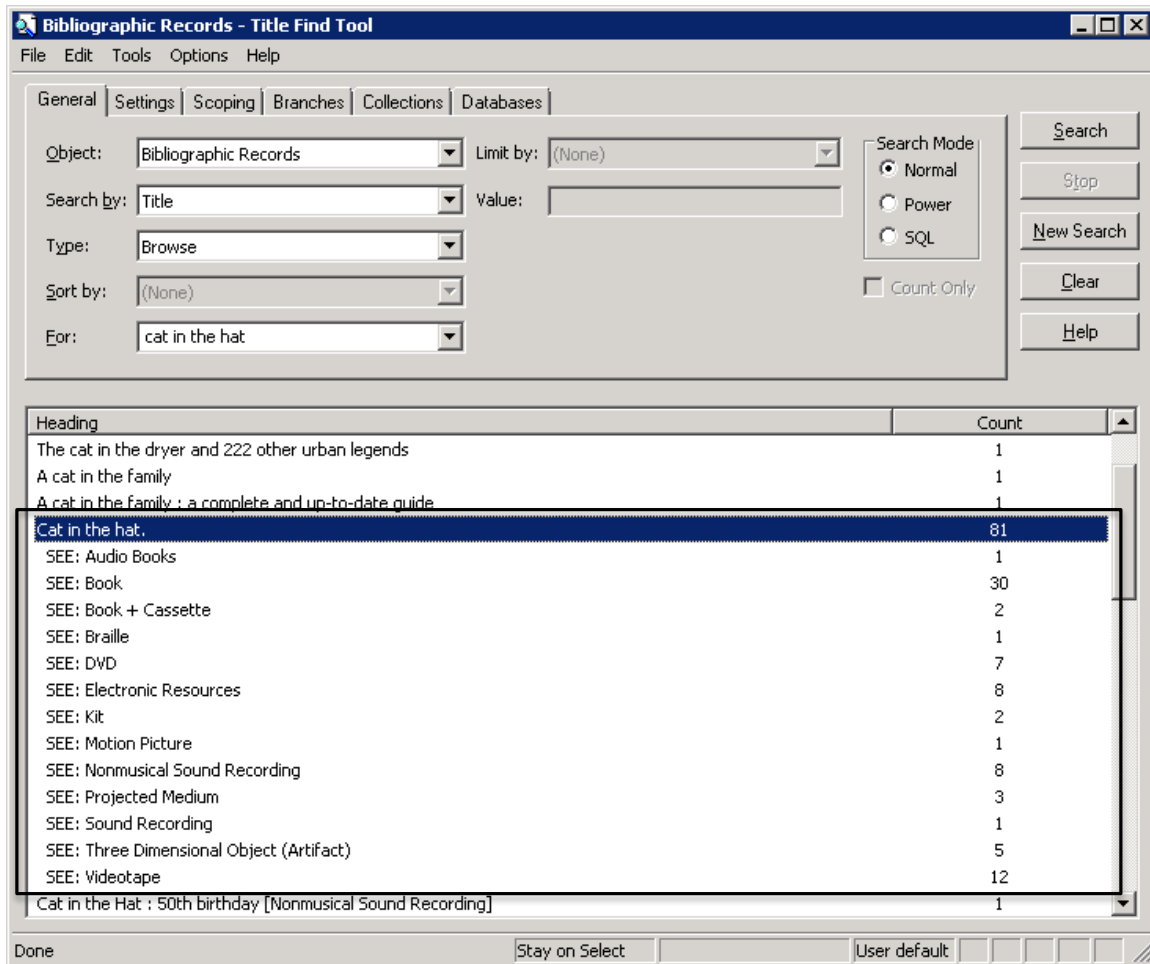
Keyword Search

When using the keyword type of search, your search results will display the records that include the exact search term or terms in any order. There is an implied 'and' between each word entered as a search term. As you type, Polaris will offer autosuggestions that you would then be able to select, if needed.
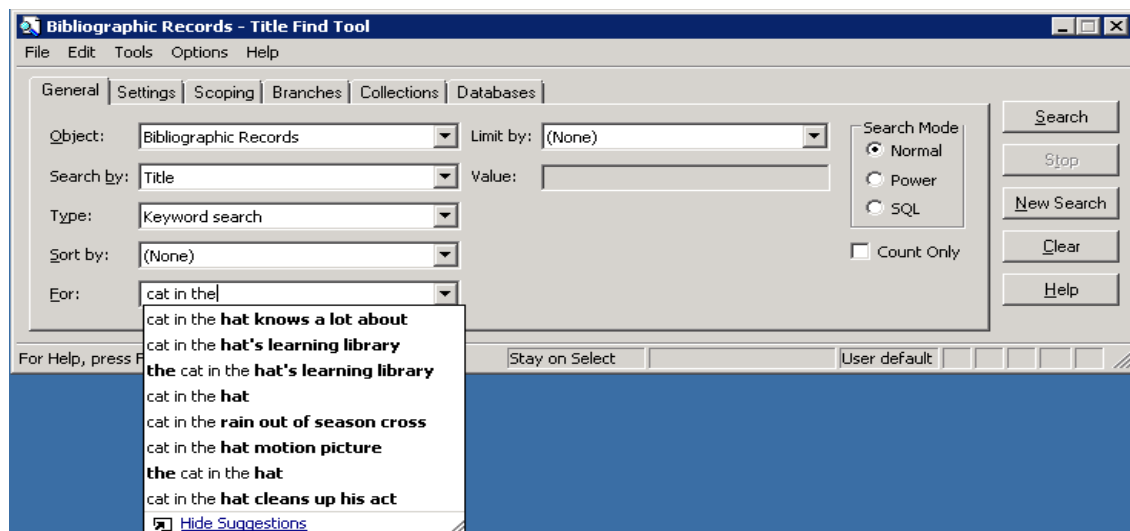
Phrase Search

When using the phrase type of search, your search results will display the records that include multiple words in the exact order in which they were entered. As you type, Polaris will offer autosuggestions that you would then be able to select, if needed.
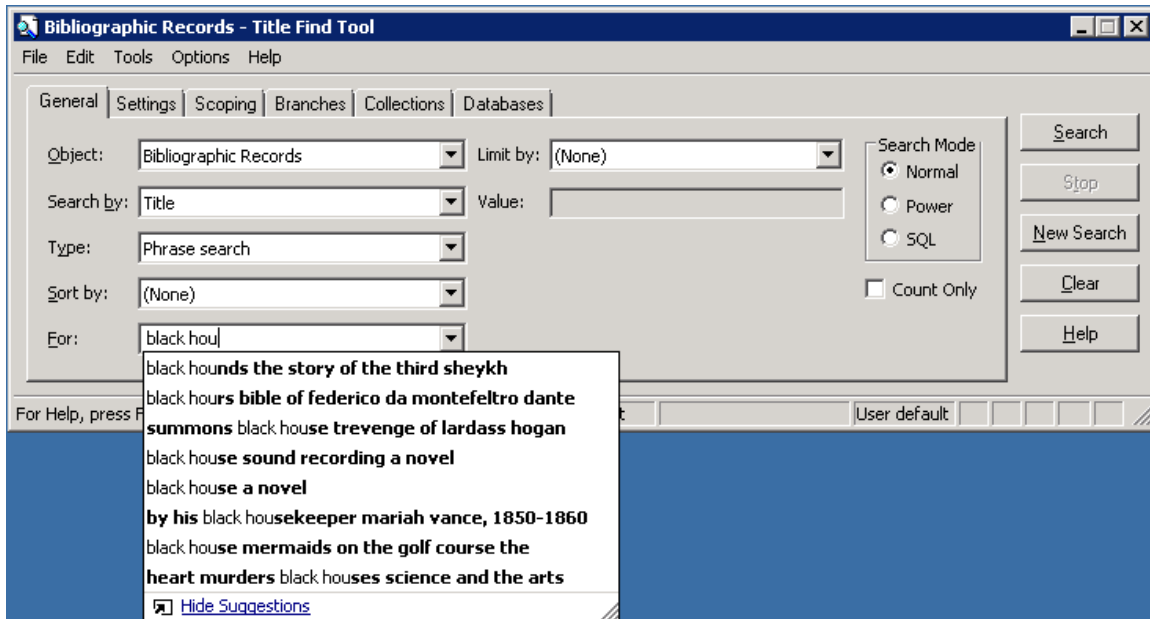
In the drop down *Sort By* menu, you can sort bibliographic records by a variety of sort options. A few of the most popular would be title, then author; author, then title; or publication date; then title.
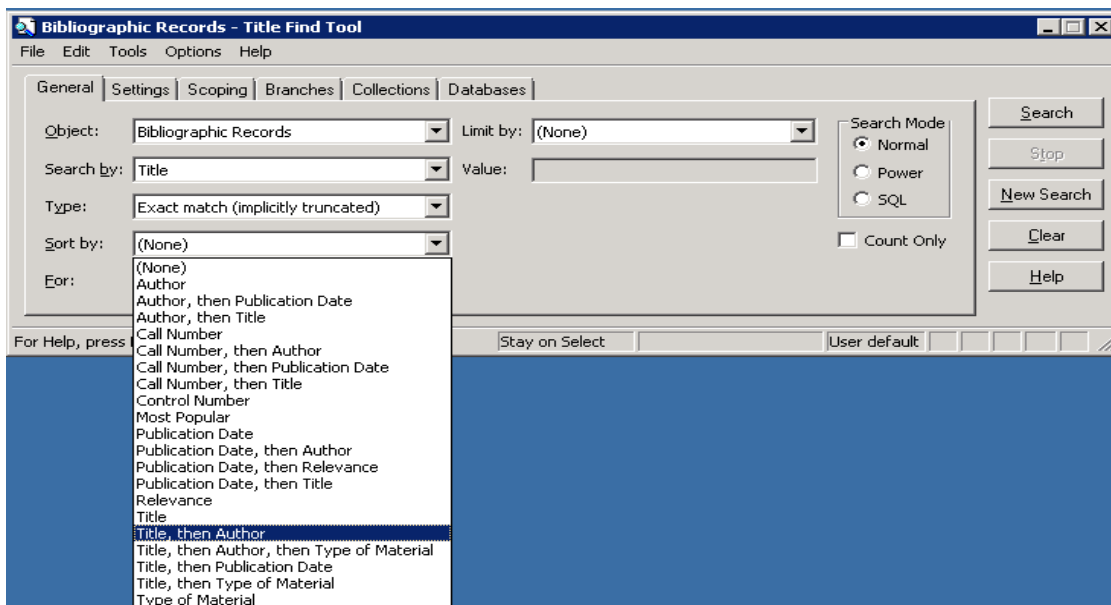
In the drop down *Limit By* menu, you can limit your search results by a variety of limit options. A few of the most popular would be title, author, genre, target audience, or type of material. After selecting one of the options in the Limit By menu, the Value box displays options for that selection in the form of a drop down menu or a free-text field for entry.
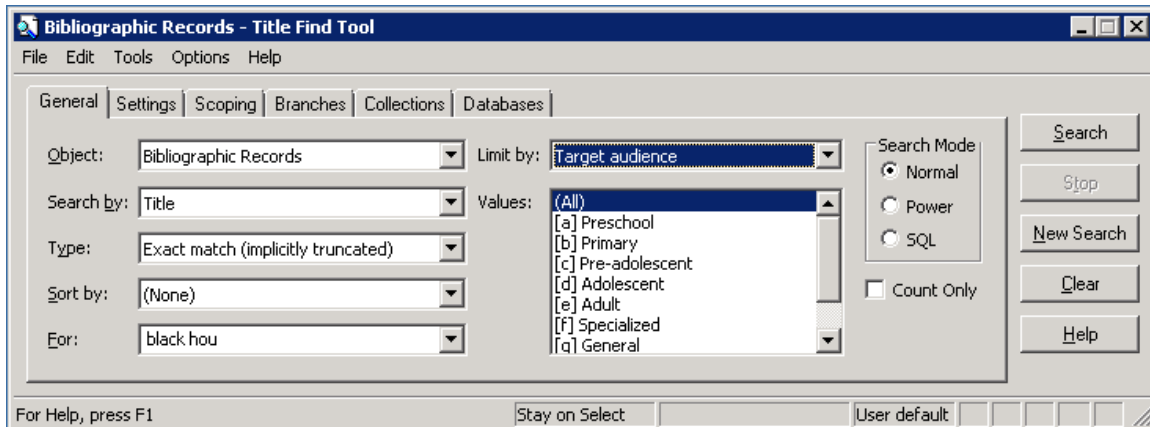
Searching for Item Records

After launching the item records search window, under the General Tab, in the drop down *Search By* menu, you can search for item records by a variety of fields. A few of the most popular would be barcode, ISBN, genre, title or author.
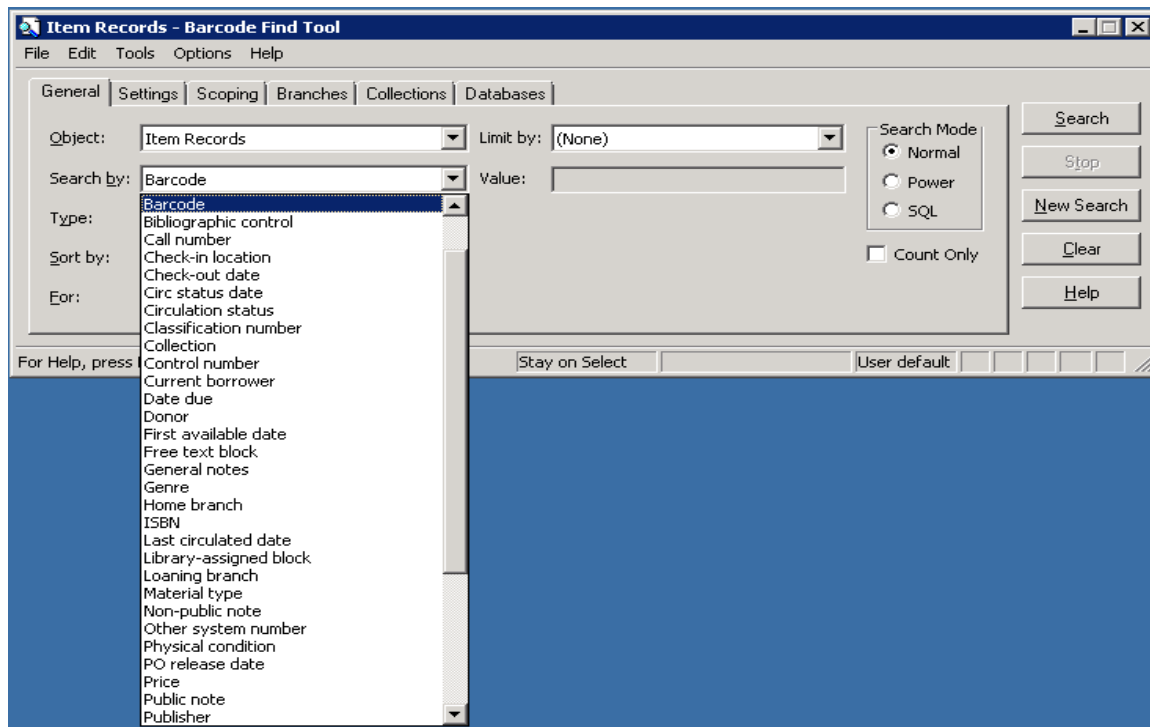
For item record searches, the type of search changes depending upon the field you have selected to search by. Some of the most common include (but there are others):

- Exact match (implicitly truncated)
- Exact match (explicitly truncated)

Exact Match (implicitly truncated)

When using the exact match (implicitly truncated) type, your search results will display all records beginning with the characters entered in the *For* box, e.g., my title begins with…. There is no need to insert an asterisk after the term; truncation is implied.

Exact Match (explicitly truncated)

When using the exact match (explicitly truncated) type, your search results will display only the records that exactly match the characters in the *For* box. If you enter an asterisk after the search term(s), the results are the same as they would be on an implicitly truncated search. Explicitly truncated searches are helpful for one-word title searches.

In the drop down *Sort By* menu, you can sort item records by a variety of sort options. A few of the most popular would be title; title, then assigned branch; or assigned branch.

In the drop down *Limit By* menu, you can limit your search results by a variety of limit options. A few of the most popular would be title, author, genre, assigned branch, collection, or target audience. After selecting one of the options, the value drop down menu displays options for that selection or provides you with a free-text field for entry.

Setting User Defaults

The General tab on the Find Tool defaults to settings customized by the individual user. Users may define custom search defaults on any General tab of each Find Tool.

To setup your search defaults, change the options in each of the drop down menus. Once your selections have been made for the general tab, go to **Options > Save as User Default**. The settings are linked to each username. You can make changes to the default settings at any time.

Wildcard Characters

There are two valid wildcard characters in Polaris: the asterisk (*) and the question mark (?). Both wildcards will produce the same results. You can use a wildcard in keyword and exact match – implicitly truncated searches. Depending where the wildcard is placed will determine the different search results.

Example:

Keyword search

- note = note
- note* = note, notes, notebook
- *note = footnote
- *note* = footnotes

Exact Match – implicitly truncated

- metal = metal, metals, metalsmith, metalcasting
- *metal = fullmetal

Search Results

After you have made your selections on the General, Branches and Collections tabs, click the **Search** button to perform the search. The search results will display in the lower panel.

Column Headers

The column headers can be adjusted to reveal or hide more of an individual column. Click and drag between each header to resize the column to your needs. Column headers also provide a quick way to sort your results list. Clicking on a column header sorts the list from A-Z or 0-9999. Clicking again on a column header sorts the list from Z-A or 9999-0.

More Information

More information on a particular title can be easily seen, by right clicking on a title. The right-click context menu allows a user to move quickly to other functionality or link to related workforms.
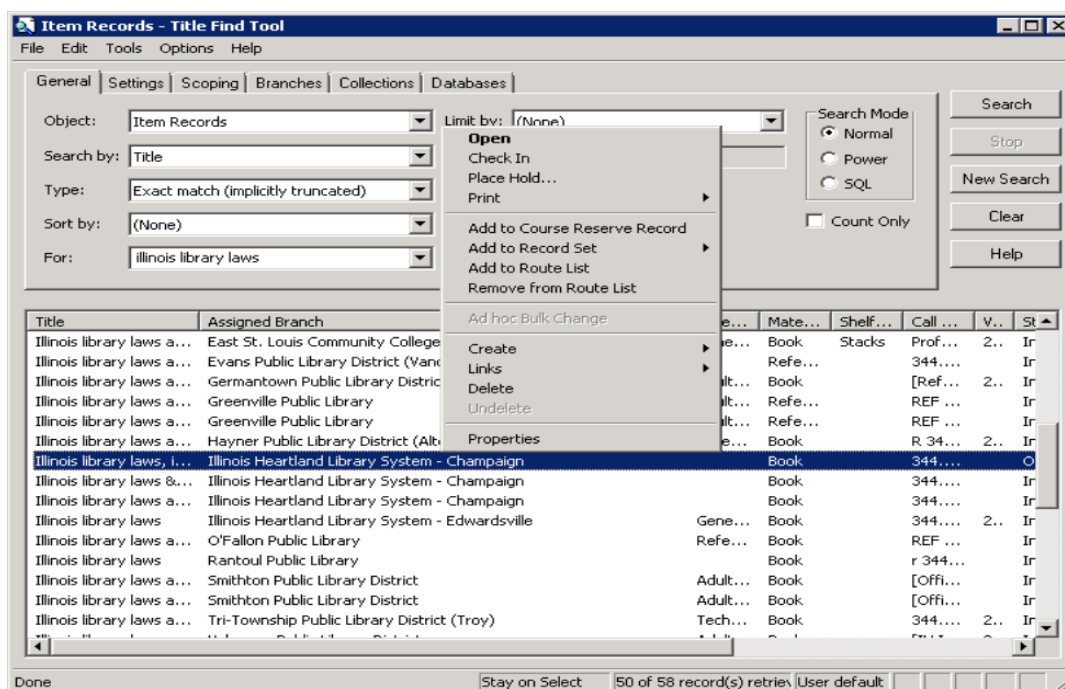
On the right-click context menu, the Preview command allows staff to see quick information about a title and all connected items – staff can easily move through a list of titles by using the arrow up and down keys.
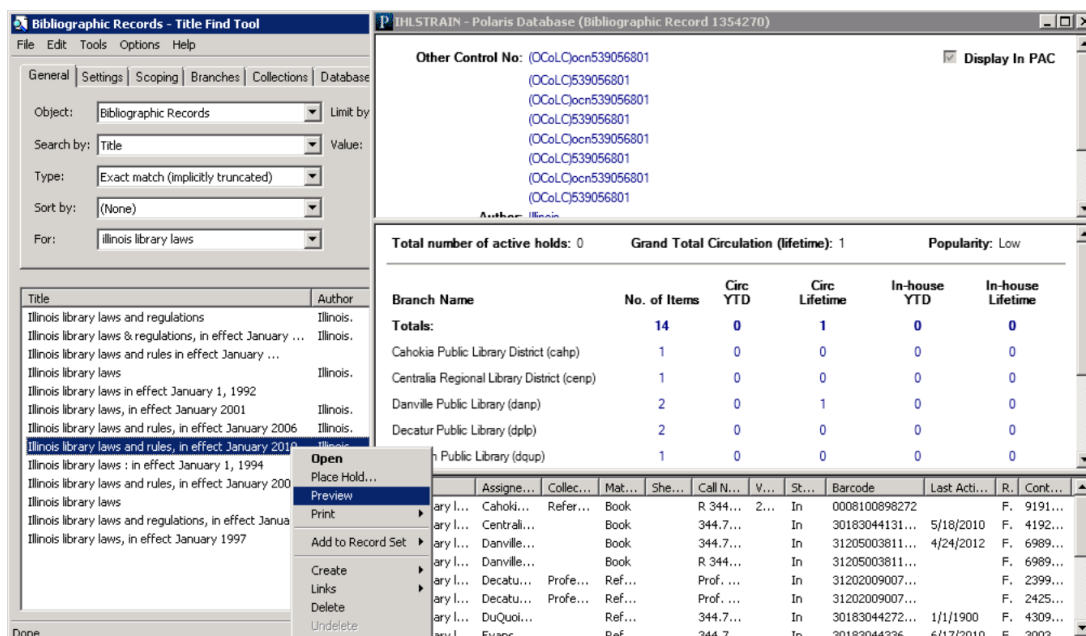
At the bottom of the search results window, you can quickly see how many records have been retrieved.
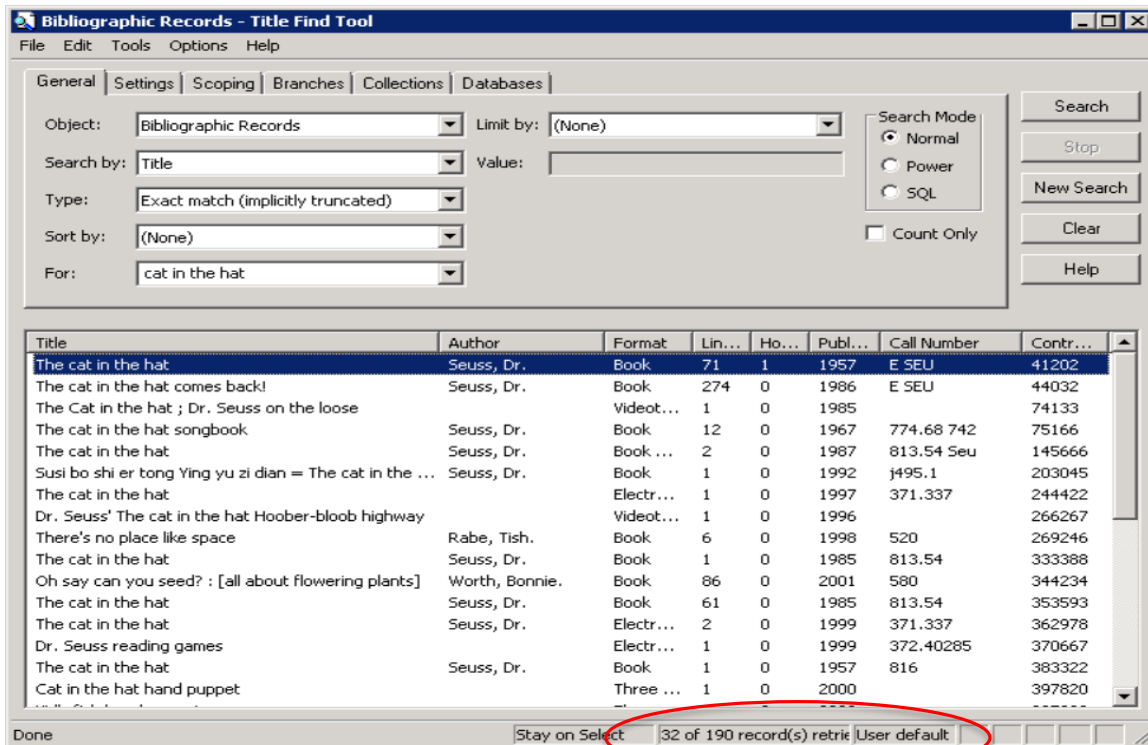
If the result set is large, only a subset of the results is initially brought back. If you want to see all results, **CTRL+SHIFT+A** will retrieve all the records.
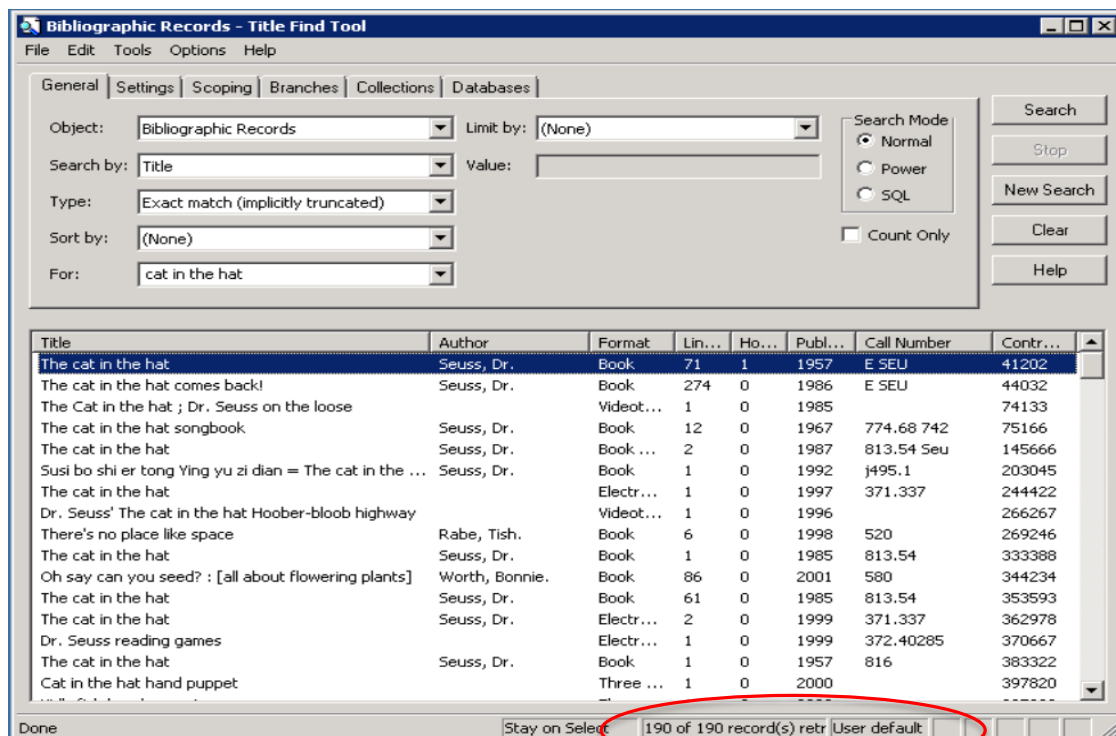
There is a default limit set in the System Administration for a maximum of 1,000 records to be retrieved in a single search. You can change this setting by clicking on the **Settings** tab, edit the value in the *Retrieval Limit* box and click **[Search].** This will make all results available to you; to see them all use **CTRL+SHIFT+A** to retrieve them to your list.

The Settings tab allows you to change the limit for a search result. This will remain in effect until you close the search window. You cannot save this setting as part of the User Defaults.

RECORD SETS

- **Creating a Record Set Directly from a Result List**
- **Creating a Record Set by Selection**
- **Creating a New Record Set**
- **Deleting a Record(s) from a Record Set**
- **Bulk Changes to Record Sets**

Record Sets are subsets or virtual groupings of patron records. Records are grouped together for specific functions within Polaris – a listing of students or for bulk change purposes.

Creating a Record Sets Directly From a Result List

1. Before running a search using the **Find Tool**, click the **Settings Tab**.

2. Under **Record Set Options**, check the box to **"Send Results to a New Record Set"**.

3. The **Name** field will become available. This is a free-text field. Name your Record Set.

4. The **Owner** field is automatically filled in with your logon, but you can change the ownership of a record set to the branch level so everyone at your library will have access to the record set.

SHARE staff strongly recommends that you name your record sets starting with your 4-letter location code. This will make it easier for you to retrieve. When retrieving your record sets, you will only be able to see your library's sets.

5. Go back to the **General** tab and perform your search. All search results will be sent to the record set window. The following window will appear:
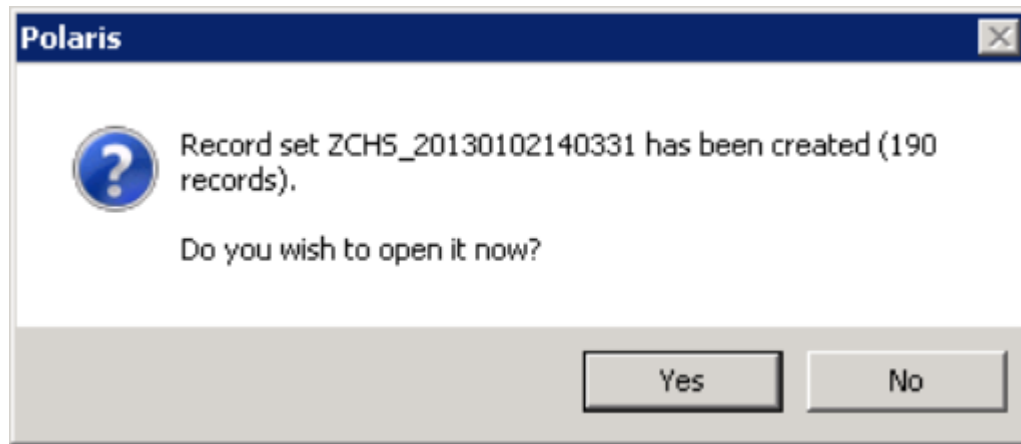
6. After clicking **[Yes],** you will see your Record Set window.
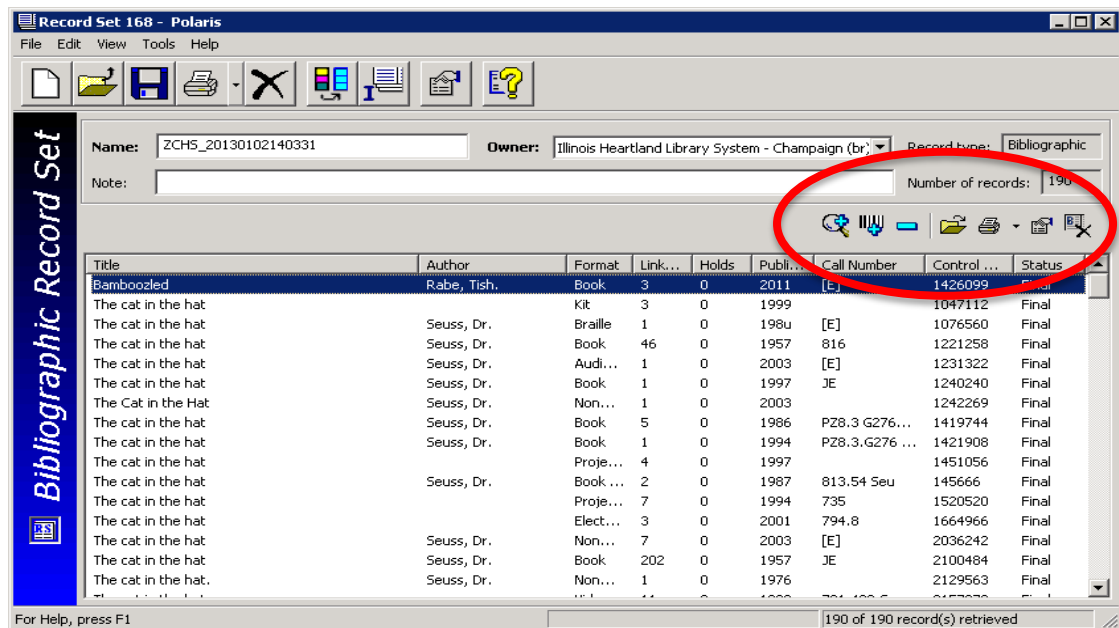
This window shows you the individual records that belong to the Record Set. It gives you another opportunity to change the ownership and to add a note. The **Line Item Tool Bar** gives you options when working in the Record Set.

From left to right, you can Add by Searching, Add by Scanning, Remove Selected Record from the Record Set, Open the Patron's Registration Record, Print, View the Properties of a Record, and Delete the Selected Record from SHARE (you may or may not have permissions to remove a record from SHARE).

Creating a Record Set by Selection

As you create lists, you can always add a name to a list by using the right-click functionality. Highlight a record; right-click then select **Add to Record Set** from the context menu. Your choices are to create a **New** record set or send this title to an **Existing** record set.
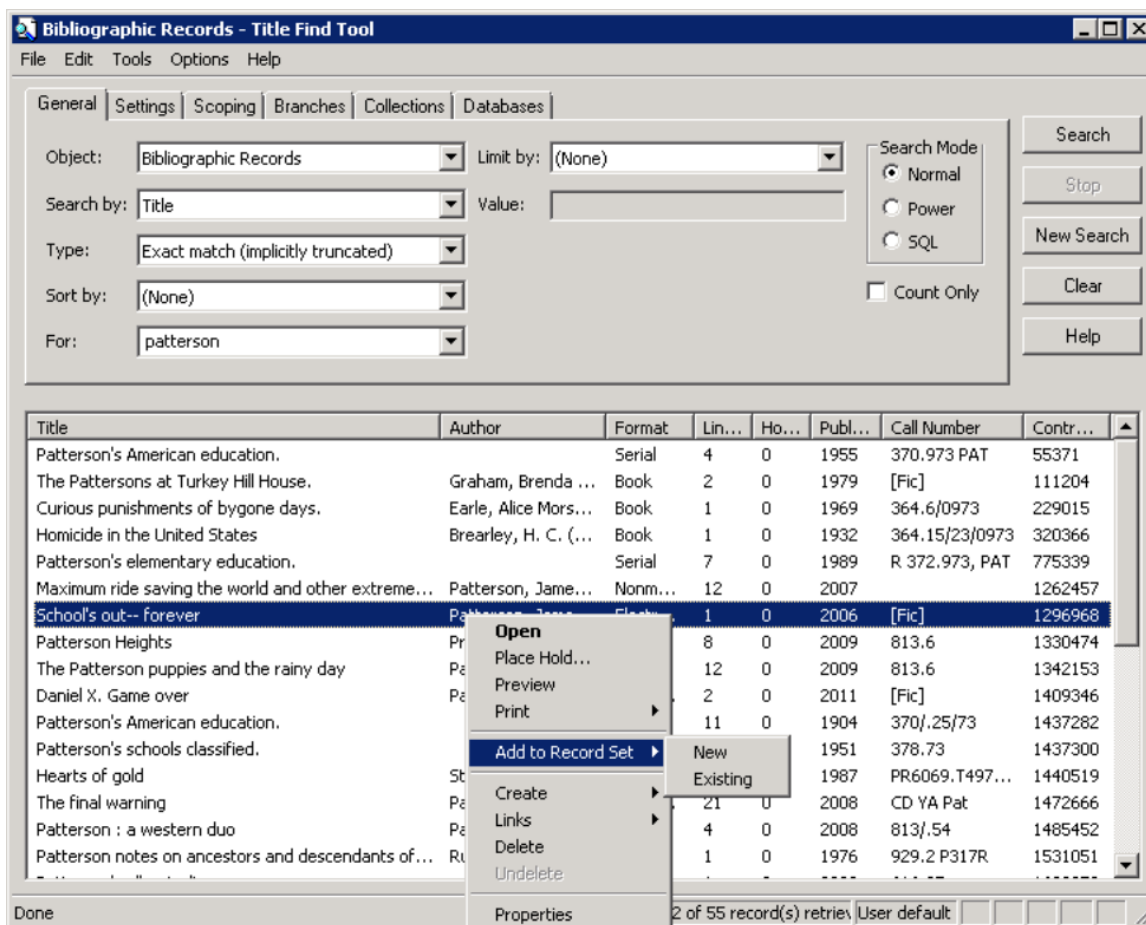
If you select **New** you will be taken to the Record Set screen, where you can name, change the ownership and add a note to the newly created record set. Click **File, Save** on the Shortcut Bar, or , or press **CTRL+S** to save this Record Set.

If you select **Existing**, a **Find Tool** window will appear. Search for your Record Set by name or owner. Double-click on the name of the Record Set to add the record to that list.

Deleting a Record(s) from a Record Set

Once the Record Set has been retrieved, you can remove one or more patrons from the set, by highlighting their name(s), click **Tools**, **Remove** or from the Line Item Tool Bar. This only removes the highlighted name(s) from your record set not from the entire SHARE database.

Deletion of Record Sets

If you wish to delete an entire Record Set, you must retrieve it first. Once the Record Set is retrieved, click **File, Delete** on the Shortcut Bar, or , or press **CTRL+D** to delete this Record Set.
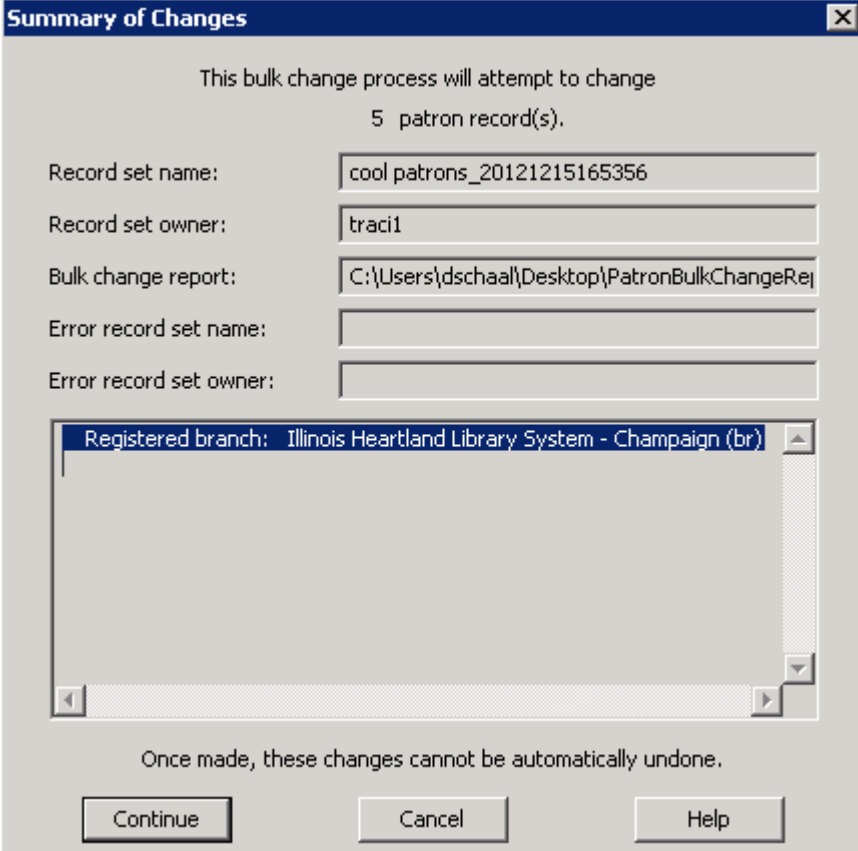
Bulk Changes to Record Sets

You can make bulk changes to most fields on bibliographic, item or patron records. This depends on your permissions. More than one field may be changed in a single bulk change operation. You specify what changes to make to the selected fields, and the same changes are applied to the selected fields in all the records in the Record Set.

1. Retrieve a Record Set workform.

2. Select **Tools, Bulk Change** or click or **CTRL+B** to display the Bulk Change dialog box.

3. Click **Report/Record Set (required)**. Change the location of the report. Polaris requires a report to be saved. You can pick your desktop or some other hard drive location for the saving of the report. Click **[Browse]** to access your computer drives.
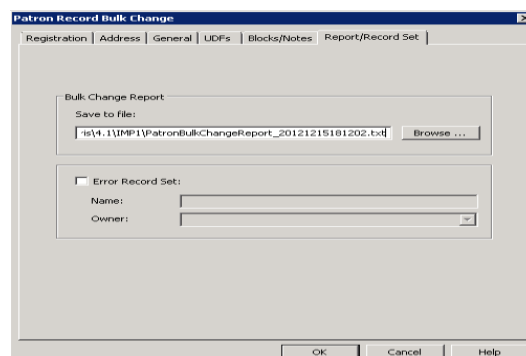
4. Click the tabs for the page that contains the field you want to change. The tabbed pages correspond to on the bibliographic, item or patron workforms.

5. Select the check box for the field you want to change; the companion box becomes available. Select or type the new value for the field in the companion box.

6. Click **[OK]** to start the bulk change process. The **Summary of Changes** will appear:

7. Click **[Continue]** to confirm your bulk change settings.

8. Click **[OK]** on the message box. The Record Set workform appears with a confirming message that the bulk changes have been completed.
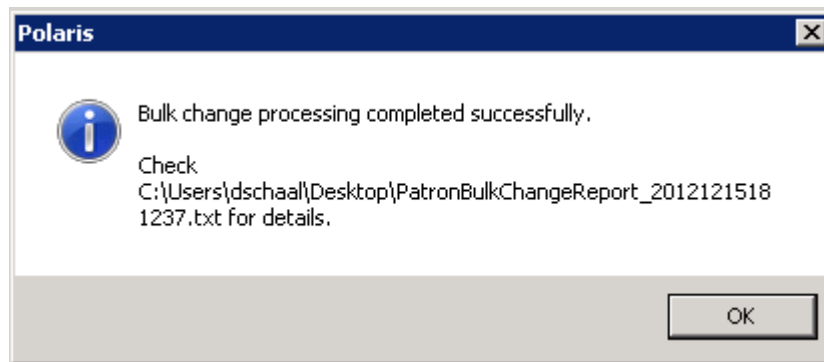
9. If you need to, you can view the **Bulk Change Report** with a text editor or word processor.

Creating a New Record Set

1. On the main Polaris toolbar, click **New**, or , or **CTRL+N,** the following window appears:
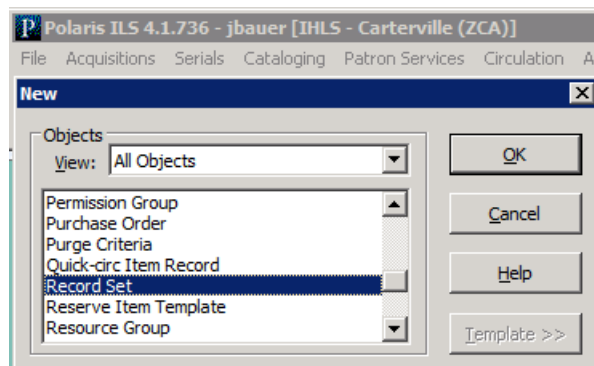
2. Highlight **Record Set**, and then click **[OK].**

3. Choose **Item** in the drop down box. Click **[OK].**
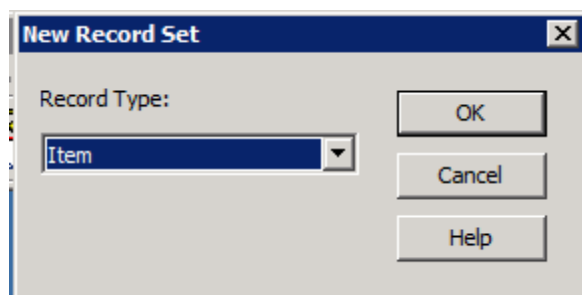
4. Input the Name of the Patron Record Set, change Owner to your *branch* if you wish to share it with others in your library.

5. To begin adding items to this Record Set, click the **Find** or **Find by Barcode** icon on the Line Item Bar.
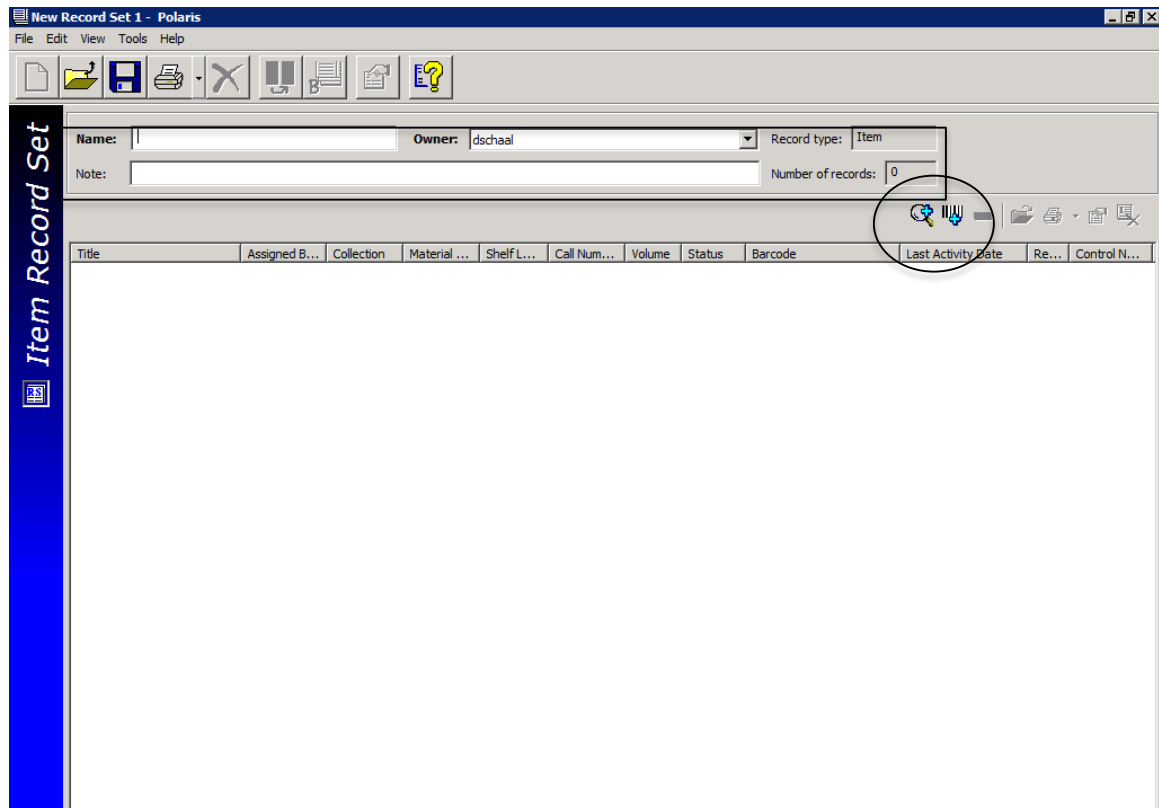
WORKFORMS

- **Layout**
- **Property Sheets**

Layout

Throughout Polaris you will be utilizing workforms. A workform is a window in Polaris where you can view, enter and edit data.

The parts of a workform are:

- Menu Bar – access functions of the entire workform via drop-down menus
- Toolbar – access functions of the entire workform via icons
- Views – different pages of the workform
- Line Item Toolbar – controls functions of the workform below itself – also known as the Coolbar.

Property Sheets

From any workform you can go to **File, Properties** or press **F8** to retrieve the corresponding property sheet. Property Sheets contain useful information about records in the database. You can also retrieve Property Sheet information on an individual title, item or patron.

APPENDIX A
Patron Services/Circulation Shortcuts and Function Keys

General

Workform Help	F1
Find Tool – Patron Registration workform (online only)	F7
Find Tool – Patron Registration workform (from workform)	CTRL+O
Find Tool – Patron Status workform (online only)	F6
Find Tool – Patron Status workform (from workform)	CTRL+O
New workform	CTRL+N
Close workform	ALT+F4
Save record	CTRL+S
Delete record	CTRL+D
Cycle from one workform view to the next	CTRL+TAB
Open the Tools Options dialog	CTRL+T
Switch between patron registration/patron status	F9
Properties	F8

Print

Print current view	CTRL+P
Print current list view	CTRL+SHIFT+P

Record Sets

New record set	CTRL+N
Find Tool – Record Set workform	CTRL+O
Load all records in Find Tool results set	CTRL+SHIFT+A
Add member by searching	CTRL+E
Add member by scanning	CTRL+K
Bulk Change	CTRL+B
Save record set	CTRL+S
Close workform	ALT+F4
Delete record set	CTRL+D
Properties	F8

Check Out

Open Check Out workform	F3
Find patron	CTRL+R
Previous patron barcode	F4
Find item	CTRL+I
Find bibliographic record	CTRL+B

Create quick-circ item	CTRL+Q
Place a hold	CTRL+H
Special loan	ALT+S
Reset due date	CTRL+ALT+D
Patron Registration workform	CTRL+F9
Patron Status General view	ALT+G
Patron Status Items Out view	ALT+O
Patron Status Account view	ALT+A
Patron Status Claims view	ALT+C
Patron Status Holds view	ALT+H
Patron Status Reader Services view	ALT+D
Patron Status Association view	ALT+W
Patron Status Notes view	ALT+N
Express-register patron	CTRL+G
RFID check-out	F9
Smart card check-out	CTRL+ALT+S

Check In

Open Check in workform	F2
Find patron	CTRL+R
Place a hold	CTRL+H
RFID check-in	F9
Change an item's circ status or shelf location	CTRL+M
Change an item's barcode	CTRL+B

Check In – Inventory

Load barcode file	CTRL+ALT+I

Patron Registration – All

Check out	CTRL+F9
Place hold	CTRL+H

Patron Status – All

Check out	CTRL+F9
Place hold	CTRL+H

Patron Status – Items Out

Renew	CTRL+R
Renew All	CTRL+A
Special Renew	CTRL+E
Make Claim	CTRL+M

Declare Lost	CTRL+L
Print items out list to a receipt printer	CTRL+ALT+P
Place a hold	CTRL+H
View an item's notice history	ALT+N

Patron Status – Account

Charge	CTRL+C
Pay	CTRL+Y
Pay All	CTRL+L
Waive	CTRL+W
Waive All	CTRL+V
Deposit	CTRL+I
Return	CTRL+R
Forfeit	CTRL+F
Credit (from deposit)	CTRL+E
Create credit	CTRL+B
Refund credit	CTRL+G
Transaction Summary	CTRL+T
View an item's notice history	ALT+N

Patron Status – Holds

Add to Group	CTRL+G
Remove from Group	CTRL+R

Patron Status – Associations

Add	CTRL+A
Edit	CTRL+E
Delete	CTRL+D

Patron Status – Claims

Reset total claims	ALT+C

Request Manager

Close workform	CTRL+F4
Refresh	F5

Hold Request Shortcuts

New Request	CTRL+N
Convert to ILL	CTRL+I
Deny Hold	CTRL+R

Cancel	CTRL+L
Reactivate	CTRL+A
Delete	CTRL+D
Properties	F8

Hold Request Workform

New Request (new patron, new title)	CTRL+N
New Request (new patron, same title)	CTRL+G
New Request (same patron, new title)	CTRL+H
Save	CTRL+S
Properties	F8
Refresh	F5
Delete	CTRL+D
Convert to ILL	CTRL+I
Deny Hold	CTRL+R
Cancel Hold	CTRL+L
Reactivate	CTRL+A
Fill Request Now	CTRL+F
Options	CTRL+T

Multi-request Patron View

Add patron	CTRL+R
Remove patron	CTRL+E
Add title	CTRL+T
Remove title	CTRL+M

Holds Queue Workform

Save	CTRL+S
Refresh	F5
New Request	CTRL+H
Move Up	CTRL+U
Move Down	CTRL+W
Move Top	CTRL+T