

**User defined fields** : Fields in the patron registration form that are defined by the library system. They can be defined as free-text fields or drop-lists of specific options. All are searchable in the Polaris staff client.

**Workform** : The primary window in Polaris, where you view, enter, and edit data



*For additional information or questions about SHARE, please contact:*

**Traci Edwards**

SHARE Manager for Administrative Services  
tedwards@illinoisheartland.org  
618-985-3711 ext. 620

**Joan Bauer**

SHARE Manager for Bibliographic Services  
jbauer@illinoisheartland.org  
217-429-2586 ext. 518

**Chris Dawdy**

SHARE Manager for Staff Services  
cdawdy@illinoisheartland.org  
618-656-3216 ext. 443

**What does that mean???**



**A collection of commonly used  
terms & abbreviations**

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# Organizational Terms

**IHLS:** Illinois Heartland Library System; IHLS is a community of multitype libraries developing partnerships and sharing resources in pursuit of excellent service.

**LLSAP:** Local Library System Automation Program (SHARE); a shared online catalog that is supported, in part, by an Illinois regional library system (IHLS). LLSAP membership is open to all IHLS libraries.

**Polaris:** The integrated library software system used by members of SHARE.

**SHARE:** Sharing Heartland's Available Resources Equally; SHARE is a collection of IHLS libraries in central and southern Illinois that have joined together to form the largest automation consortium in the country. There were many reasons to develop this consortium, including the ability to share the cost of purchasing an integrated library system, staff, technical support, and training.

**SHARE Administrative Services Team:** SHARE staff who are responsible for developing the fee formula annually; developing and managing the LLSAP budget; completing profiling for potential new LLSAP members; monitoring the admin module of the ILS (integrated library software); providing ILS and 3rd party reports management; tracking and reporting statistical activity for the entire LLSAP, as well as individual libraries; working with the Governance group regarding policy development; integrated library software (ILS) patron record clean-up; managing loan rules, patron types, fines and fees, etc., in the ILS; maintaining offline circulation, room reservations, homebound, and inventory records; providing documentation, training, and troubleshooting assistance for staff and libraries; managing holds matrix/interface with delivery changes to maximize turnaround time.

**Reading history** = A list of items that a patron has checked out since the history was started. Renewals are not included in the list, but multiple check-outs of the same item are included.

**Receipts** = In Polaris, you can specify which receipts and slips should print from specific workforms (check-out, check-in, and so forth), what information to include, whether to use a page or receipt printer, and which printer should be used. Polaris provides the following kinds of circulation receipts and slips: check-out/renewal receipts; check-in receipts; fine receipts; several types of hold slips; in-transit slips; ILL (inter-library loan) slips. eReceipts (e-mail or text message receipts) are also available.

**Record set** = Records of the same type (bibliographic, item, or patron) grouped in a retrievable file, on which you can perform common tasks; AKA create list or review file.

**Request to fill list** = Polaris sends hold requests to designated libraries in a specified order. A library chooses to fill or deny the request. The request is routed until it is filled, it expires, or every library denies it; AKA paging list, pick list, pull list.

**Results or result set** = A collection of one or more records found as a result of a search.

**Shelf location** = Define subsets or different locations of the materials within a branch. Shelf Locations are usually used together with Collections hierarchically (for example, Collection - Reference, Shelf Location - Children's Reference). Shelf Locations can be shown, along with call number and collection, in an item display in the PAC; AKA location code

**Trapping holds** = An item is said to be trapped for a hold when an item that fills a request is scanned at circulation and the system links the item to a specific request, either automatically or by displaying a message that prompts you for a decision.

**Type of material (TOM)** = Bibliographic-level format indicator derived from the LDR/06, LDR/07, the 006 tag, the 007 tag, and other combinations of codes. This generates the format icon in the PAC and enables searching for bibliographic records using the TOM in the staff client and PAC.

other databases, place requests, access the patron account, and use other features the library may implement; AKA OPAC.

**Patron Blocks** = The blocks that a staff member may place on a patron record to “flag” a particular condition. For example, a branch may have staff-initiated patron blocks for Lost and Found and See Director.

**Patron codes** = The codes that the library assigns to identify different patron groups. For example, the library may have patron codes assigned to adults, juveniles, students, senior citizens, or other groups. Patron codes are used for setting circulation rules and gathering statistics; AKA B type or patron type.

**Patron record** = A Polaris patron services record that contains information about the patron, including name, address, registration location, and notification data.

**Patron registration fields** = Five fields in the patron registration form that are defined by the library system. All of them are searchable, free-text fields.

**Patron statistical class code** = Branch-defined information codes used to enhance reports (for example, Adult Resident, Adult Non-Resident).

**Permissions** = Set in Polaris Administration, these control who can do specific actions at an organization. Both staff and workstations must have the appropriate permissions to be able to perform specific tasks.

**Pick list** = AKA paging list or pull list.

**Quick Circ** = Using Polaris Quick-Circ, you can circulate items that are not intended for full cataloging and generate circulation statistics for these items. For example, items suitable for quick-circ circulation might include old mass-market paperbacks or pamphlets. Quick-circ items differ from regular items in that they have no conventional Polaris item records. A quick-circ item is identified only by a barcode, assigned branch and collection, and material type. The primary advantage of Polaris Quick-Circ is in tracking and reporting circulation statistics for these kinds of items.

**SHARE Affiliate Member:** An IHLS full member library that does not have an ILS (standalone, shared, consortial, etc.). Affiliate members can have limited access (via the PAC) in order to request materials from the SHARE database. There is no fee for this member type.

**SHARE Bibliographic Services Team:** SHARE staff who are responsible for maintaining a pristine bibliographic database, including serials clean-up; bibliographic records clean-up; authority records clean-up; copy cataloging; original cataloging; authority record loads for updated records; OCLC master record upgrades; migration database clean-up; index mapping; NACO name authority records creation; special collections cataloging; works with the Governance group regarding policy development; providing documentation, training, and troubleshooting assistance for staff and libraries.

**SHARE Bibliographic and Cataloging Standards Committee:** provides a forum for member library cataloging staff to share information about functionality and best practices; serves as a sounding board for solutions to cataloging issues; and reviews and makes recommendations concerning cataloging policy and procedures.

**SHARE CARLI Affiliate Member:** An IHLS full member library academic, that is a member of CARLI. CARLI Affiliate members can have limited access (via the PAC) in order to request materials from the SHARE database. There is no fee for this member type.

**SHARE Circulation and Resource Sharing Committee:** provides a forum for member library circulation staff to share information about functionality and best practices; serves as a sounding board for solutions to circulation issues; and reviews and makes recommendations concerning circulation policy and procedures.

**SHARE Executive Council:** Executive Council exists to consider and handle business brought forward when more immediate decisions need to be made. It exists to set direction, policy, and procedures for the operation of the LLSAP. SHARE provides for the Director of Illinois Heartland Library System a mechanism for advice and consent on matters pertaining to the

LLSAP. The Executive Council develops and provides recommendations for proposed operational policies under consideration to the SHARE libraries and its Member's Group. Replaces legacy groups known as eCat LLSAP Governing Board, GateNet Advisory Council, LINC Policy Council, and SILNET Executive Board.

**SHARE Full Member:** An IHLS full member library that pays fees allowing access to at least the basic modules including circulation, cataloging, reports, serials, OPAC, and inventory of the SHARE automation software.

**SHARE Local:** a discussion and information forum for SHARE member library directors and staff, and SHARE staff.

**SHARE Members Group:** consists of SHARE Affiliate, SHARE Transitional and SHARE Full members. SHARE Affiliate and Transitional members may attend meetings, but cannot vote. SHARE full members are members with voting privileges and conduct the business of the Members' Group. SHARE full member libraries provide: approval and amendments to bylaws; approval of memorandum of understanding; approval of membership fee formulas and fees; approval of long range plans; and election of members to the Executive Council. Additionally, SHARE full members review options related to the procurement of an integrated library system.

**SHARE Policies and Finance/Fees Committee:** reviews and makes recommendations concerning fee formula, SHARE budget, and policies pertaining to SHARE. This committee will also be the nominating committee.

**SHARE Staff Services Team:** SHARE staff who are responsible for maintaining a grants database for libraries, pursuing grants to benefit the LLSAP, assisting in organizing and providing continuing education activities for member library staff (including barcoder training, cataloging training, serials training, RDA training, barcoder's certification, circulation training, PAC training, ILS and 3rd party vendor training, acquisitions training, inventory training, OCLC interlibrary loan (First Search) training), maintaining documentation for system staff training and evaluation of training, assisting with providing for customer (member libraries) needs and service evaluations.

have staff-initiated item blocks for Send to Cataloging, Send to Tech Services for Repair, and Kit: Check All Parts.

**Item level hold** = an request for a specific item when only that item satisfies the request. Example, several items are linked to the bibliographic record, but only a specific item, a large print copy, satisfies the request.

**Item statistical class** = Branch-defined item descriptions used for reports. For example, a branch may define codes for Dewey Range (1=000-099, 2=100-199, 3=200-299, etc.). Another branch may define codes for Reading Level (1=Grades K-5, 2=Grades 6-12, 3=Grades 12+).

**Material types** = The item-level codes that the library assigns to specific physical material types, such as books, videos, audiotapes, and other materials. Material Types have multiple purposes. For example, they are used to limit the number of items a patron can check out or request. Also, they can be used for gathering statistics for reports; AKA I type or item type

**Notification types** = Polaris includes the following notice types: overdue notices (1-3); bills; fine notices; request pick-up notices; cancelled request notices; reminders; combined notices that can include overdue, bill, and request notices going to the same patron; serial claim notices; serial routing notices. Delivery methods include print for mailing, e-mail, telephone, and text message to mobile phone.

**Offline circulation** = Doing circulation transactions while disconnected from the Polaris server. When the offline period is over, the transaction information is uploaded to Polaris and the database is updated.

**Outreach services** = Licensed Polaris feature. These functions automate title selection and delivery to homebound and other designated patrons, and allow individual patron profiles based on reading preferences, delivery mode, and other characteristics. You can have Polaris generate selection lists for individual patrons, or manage outreach services for multiple patrons, based on the next scheduled delivery date or delivery route.

**PAC** = The online public access catalog. A software application intended for patron use, allowing a user to search the library online catalog and

**Fee descriptions** = reasons why a library would charge a patron (other than overdue fines). For example, patrons might be charged for photocopies, rewind fees, lost items, or damaged items.

**Fine rate codes** = Codes assigned to all fine rates used in the system. The Fine Rate codes are used to set standard fine rates, and in combination with Patron Codes to set fine rate exceptions. Fine Rate Codes are grouped by types of materials (materials that have common circulation rules). As a result, each code is characterized by a logical group of materials that share the same fining policy.

**Free days** = A value applied at normal and bulk check-in, renewal, and offline that allows you to omit a specified number of days from the overdue fine calculation.

**Grace Days** = The days allowed after the due date to return an item without a fine. If the item is returned within the grace period, no fines are assessed. If an item is returned after the grace period, the total fine is assessed from the due date, including the grace days.

**Hold** = Polaris term for the process you may know as “reserve.” (In Polaris, “reserve” refers to setting items aside for specific academic courses.) A hold request is a system function by which an item is blocked from circulation and kept for a patron to pick up later; AKA request, hold, reserve.

**Hold request** = A request to set aside an item for a patron to pick up later, usually because the item is currently unavailable. A patron or staff member may place a hold request.

**Holds queue** = A list of requests with an active status and requests with a pending status for a title or item. You can manually change the order of requests in the queue.

**In transit** = Item circulation status assigned to an item at check-in when the item belongs to another branch. An in-transit slip may be printed at check-in to place with the item.

**Item blocks** = The blocks that a staff member may place on an item record to “flag” a particular condition. For example, a branch may

**SHARE Transitional Member:** An IHLS full member library with an integrated library system (ILS) that intends to become a full SHARE member within a three year period. Transitional members pay fees that allow limited access in order to request materials found in the SHARE database and for start-up/implementation into SHARE. SHARE Transitional Membership is encouraged so access can be provided to those members who would like to participate in the SHARE automation system, but require time to make the change.



# Polaris Terminology

**Access point** = a searchable key or index to a record or set of records.

**Association** = A relationship between two or more patron records that allows users to open one patron record and access other linked patron records. A patron record can be associated with an unlimited number of other records in a one-to-many relationship. You can optionally create a blocking relationship, in which a “parent” record is blocked when an associated “child” record is blocked; AKA\* linked patrons.

**Borrower** = AKA patron.

**Block** = Polaris term for the condition you may know as “stop.” A block interrupts the check-out, renewal, or placement of a hold under certain conditions in Polaris. A block notification message appears. Library staff can override certain types of blocks to continue with the transaction; AKA stop or PURF.

**Branch** = Part of a library system, usually in a separate physical location. In Polaris, both the main library and other member libraries are referred to as “branches.” AKA library, agency, or branch.

**Check-in** = AKA check-in, return, check in, discharge.

**Check-out** = AKA check-out , check out, loan, charge.

**Claim** = An assertion by a patron that she never checked out an item or that the item was returned, but Polaris shows that the item is still checked out to her. The options in Polaris that indicate a claim was made are Claim Returned and Claim Never Had. A Current Claims setting determines the number of unresolved claims a patron can have before her account is blocked. AKA claims returned or claimed returned.

\*AKA = Also Known As

**Collection** = A group of materials which share common characteristics and perhaps a location, such as Reference and Periodicals. Collections can be shown, along with call number and shelf location, in an item display in the PAC. Collections can be used by themselves, or together with shelf locations hierarchically (for example, Collection: Reference, Shelf Location: Children’s Reference); AKA location code.

**Context menu** = A menu that is displayed for a selected object when you right-click the object. The menu contains commands that are contextually relevant to the selection.

**Course Reserves** = You can place materials on reserve for use in a class during a semester or term. Reserve materials can be drawn from the regular collection, instructors may bring in personal material to be placed on reserve, or the materials may be temporary items such as photocopies. Course reserve records store information about the courses for which items are placed on reserve. Polaris handles the reserved items through reserve item “records,” which are views of Polaris item records for materials placed on reserve. The reserve item record carries its own circulation parameters, which may be different from those in effect if an item is taken off reserve and returned to the circulating collection. Circulation statistics for reserve items are also kept separately. Staff and patrons can search for reserve materials from the staff client and the PAC; AKA reserve room book, course reserves, academic use, item type of reserve

**Dates closed** = Dates when fines are not assessed and items do not fall due. For example, a branch is closed on December 25, so they do not want materials due on that date; AKA calendar, days closed.

**Days not fineable** = Days of the week when fines are not assessed. For example, a branch is closed on Sunday, so they do not want fines assessed on that day. Items can fall due on these days; AKA days closed.

**End of term dates** = limiting that prevents items from falling due past these dates, even if the actual loan period is longer. Patrons with certain codes can be exempt from end-of-term dates.

**Fast-Add** = AKA on-the-fly