Polaris® Basics Guide

POLARIS
LIBRARY SYSTEMS
Count on us.

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Contents

About This Guide

This guide is intended for library employees who use the Polaris staff client application to do administrative, technical services, and patron services tasks. It contains an overview of common features in Polaris, and provides instructions for finding existing records, creating new records, using record sets, and generating reports.

To do the tasks in this guide, permissions must be set for your user name. If you have questions about permissions in Polaris, see your Polaris administrator.

Polaris Basics Topics

Important:
For information about developments that may have occurred after this information was published, go to **www.polarislibrary.com** and select **Customer Tools**, **Customer Extranet**.

This guide covers the following topics:

Getting Started in Polaris Overview of features, functionality, and navigation methods common throughout Polaris; how to use the Polaris Shortcut Bar and workforms; printing records; logging on and exiting Polaris.

Using Polaris Documentation Using Polaris guides and online Help.

Finding Polaris Records Basic searching; browse, keyword, and phrase searches; how to focus searches. Search tips.

Creating and Deleting Records Creating new records; linking records; deleting records. Deleting records.

Creating and Using Record Sets Creating record sets and using them to do bulk processing on many records simultaneously.

Using Polaris Standard Reports Generating standard and custom reports in Polaris; reference list of standard reports.

Basic Shortcut Keys List of shortcut keys formatted for convenient printing and clipping.

Related Resources

In addition to the Polaris® Basics Guide, the following resources may be helpful when using Polaris:

- Polaris Online Help

  Polaris online Help is accessible from the Help menu on any Polaris window or by pressing **F1** with a Polaris window active. It provides information and instructions for the Polaris staff client subsystems, and Polaris administration (includes administration and customization options for the staff client, PAC applications, and other Polaris functions).

- Polaris Staff Client Guides

  Polaris® Patron Services Guide

  Polaris® Acquisitions Guide

  Polaris® Cataloging Guide

  Polaris® Serials Guide

- Polaris Public Access Guides

  For information about using the Polaris PACs, see the following guides or PAC Online Help:

  - *Polaris® PowerPAC Guide*
  - *Polaris® PowerPAC Children's Edition Guide*

- Polaris Administration Guides
  - *Polaris Administration Guide* - Contains information about using the Polaris Administration interface; setting up organizations, servers, collections, workstations, and staff members; setting permissions, parameters, and profiles; working with tables; setting search tool characteristics, barcode formats, online document location, and transaction logging.
  - *Polaris Public Access Administration Guide* - Contains information about setting up and customizing Polaris® PowerPAC™, Polaris Mobile PAC, and Polaris® PowerPAC™ Children's Edition.
  - *Polaris Telephony Administration Guide* - Contains information about setting up and customizing outbound and inbound telephony services.
  - *Polaris ExpressCheck Administration Guide* - Contains information about setting up the Polaris ExpressCheck workstation, Polaris Administration settings for Polaris ExpressCheck circulation, and customizing the Polaris ExpressCheck interface.

- Library Polaris Administrator

  If you have questions about using Polaris, contact your Polaris administrator or trainer at the library for help.

- Polaris Library Systems Web Site

  For updated user and support information, go to **www.polaristown.com**. You can also contact your Site Manager at:
  1-877-857-1978.

- A Microsoft® Windows® guide or Microsoft's web site at **www.microsoft.com**

  The Polaris Basics Guide includes some tips for using Windows, but it is written with the assumption that staff have prior training or experience using Windows. For basic information on using Windows-based applications, consult one of the many guides to Windows or go to the Microsoft's Windows Basics web page at:

  http://windowshelp.microsoft.com/windows/en-us/winbasics.mspx

Getting Started in Polaris

This unit describes the features, functionality, and navigation methods found throughout the Polaris staff client application.

Opening and Exiting Polaris

The Polaris staff client is displayed according to the computer's screen resolution and magnification settings. For workstations running Windows Vista, Windows 7, or Windows 8, you can modify your computer's magnification setting from the default Small (100%) to Medium (125%) or Large (150%), and the Polaris UI will reflect these changes. (This is not supported in Terminal Services.) In addition, customers who have large monitors can change the screen resolution to 1024 x 768 or above for Windows XP, Windows Vista, or Windows 7.

However, when the resolution is set at 1024 x 768 or below, and you change the magnification from the default Small (100%) to Medium (125%) or Large (150%), some workforms may be partially obscured. If the resolution is set above 1024 x 768, you can increase the magnification above the default (100%) to enlarge the workforms while still fitting them to the screen.

The resolution and magnification settings also affect the page orientation when printing workform views. If the current resolution and magnification settings on a workstation make the workform view printout too large to fit in portrait, the view is printed in landscape orientation. For more information, see "Printing Records" on page 22.

When you log on to Polaris, the settings in effect are determined by the branch with which your user name is associated. In addition, the permissions associated with your logon ID and the workstation determine what Polaris tasks you can do. If you work at multiple branches, you select a branch name at log-on to be sure the settings are appropriate for the branch where you are working.

For libraries that use a training server, the Polaris Administrator can set an alert message to staff members that they are logging into the training server. Or, the Polaris Administrator can set different workform colors to distinguish the training server from the production server. For more information, see "Visual Cues for Staff Client Log-On Server" in the *Polaris Administration Guide 4.1R2*.

If automatic log-on is enabled for the workstation, the log on dialog box is skipped, and you are automatically logged in to the Polaris application using Windows Active Directory. For more information, see "Automatic Staff Client Log-On" in the *Polaris Administration Guide 4.1R2*.

See the following topics:

• "Start and log on to the Polaris staff client" on page 6
• "Exit the Polaris staff client" on page 8

Start and log on to the Polaris staff client

Follow these steps to log on.

1. Turn on the Polaris staff client computer.

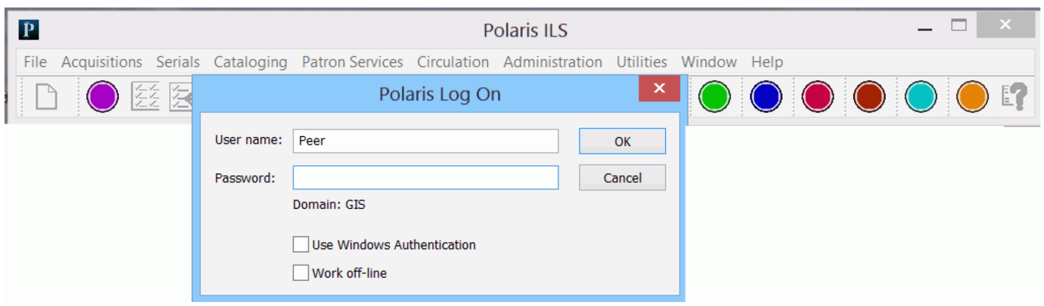
   The Windows desktop appears.

2. Double-click the Polaris shortcut icon on the desktop .

   The Polaris Shortcut Bar and the Polaris Log On dialog box appear.

3. If you are configured to log on to Polaris using Windows credentials, select **Use Windows Authentication**. The **Name, Password,** and **Domain** fields will then be grayed out.

   Note:
   If this option is not available with your current configuration, it will appear grayed out.



Tip:
If you do not want to log on at this time, click **Cancel**. When you want to log on, select **File, Log On** or press **CTRL+L**.

4. To log on with your own or other Polaris credentials, if your user name is not automatically entered in the **Name** box, type your user name in the box.

5. Type your password in the **Password** box.

6. If the domain name is not automatically entered in the **Domain** box, type the library's domain name in the box.

   Note:
   Your system may be set up so that you do not need to specify a network domain.

7. If you are logging on to Polaris offline, such as from a bookmobile, select the **Work off-line** check box.

8. Click **OK**.

   Note:
   If your library provides the ability to log on as a rotating staff member, the Polaris Log On Branch dialog box appears. Select the branch at which you are working. (The options are determined by Polaris Administration settings.)

9. If the Polaris log on branch dialog box appears, select the branch.

   The menu and toolbar options are available on the Polaris Shortcut Bar. Your user name is displayed in the title bar to indicate that you have logged on.

Related Information

- **Starting a staff client task** - After you log on, you can use the Shortcut Bar to do the following tasks:
  - Start a subsystem task (see “Using the Polaris Shortcut Bar” on page 9).
  - Create a record (see “Creating and Deleting Records” on page 80).
  - Find a record (see “Finding Polaris Records” on page 33).
  - Get help with Polaris (see “Using Online Help” on page 29).
- **Alerts for users logging in to training server** - Your system administrator can use the system-level Staff Client profile **Client visual alert configuration** to set an alert message and/or custom title bar colors, so that users can quickly identify whether they are logging in to a training or production server. For more information, see “Visual Cues for Staff Client Log-On Server” in the *Polaris Administration Guide 4.1R2*.
- **Working with Polaris Administration** - See the *Polaris Administration Guide* or online Help.
- **Overriding permission blocks** - Occasionally you may need to ask a supervisor (or anyone with the appropriate override profiles set to Yes) to override a Polaris block and allow the operation to continue. For more information, see “Override a permission block” on page 26.

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Close all windows within the Polaris staff client

Follow these steps to close all windows open within the staff client. This closes all open windows within Polaris, but keeps the Polaris staff client open.

Tip:
Press **ALT+F** to open the **File** menu, and press **X** to exit.

1. Select **Windows, Close All** from the Polaris Shortcut Bar.

   A message informs you that any open windows will be closed and asks if you want to continue.

2. Click **OK** to close all windows.

   All open Polaris windows close if there are no unsaved records. If there are unsaved records, a message asks if you want to save them.

3. If unsaved records are open, choose one of the following options:
   - To save the record and exit Polaris, click **Yes**.
   - To exit Polaris without saving the record, click **No**.
   - To return to the record’s workform and cancel the exit command, click **Cancel**.

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Exit the Polaris staff client

Follow these steps to exit the staff client. This closes all Polaris windows and the Polaris Shortcut Bar.

> **Note:**
> To log off the Polaris staff client, which closes all open windows but keeps the Shortcut Bar displayed, select **File, Log Off** or press **CTRL+L**.

1. Select **File, Exit** from the Polaris Shortcut Bar.

   A message informs you that all open windows will be closed and asks if you want to continue.

2. Click **OK** to exit Polaris.

   All open Polaris windows and the Polaris Shortcut Bar close if there are no unsaved records. If there are unsaved records, a message asks if you want to save them.

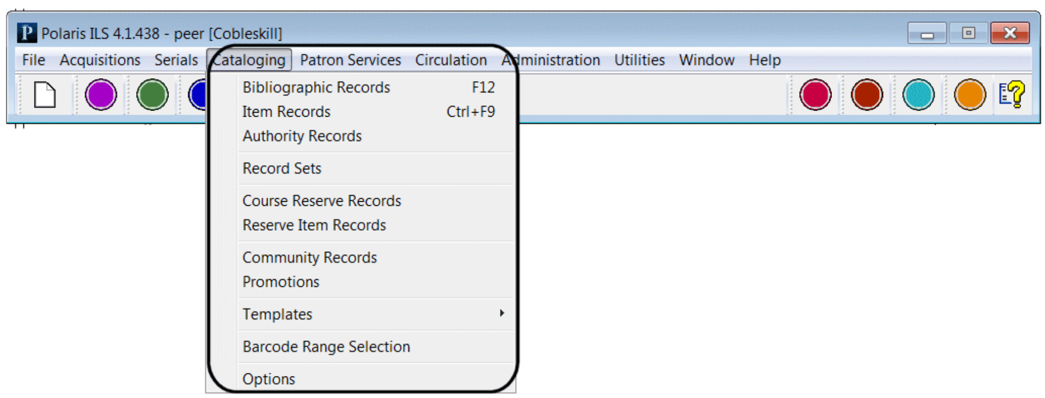
3. If unsaved records are open, choose one of the following options:
   - To save the record and exit Polaris, click **Yes**.
   - To exit Polaris without saving the record, click **No**.
   - To return to the record's workform and cancel the exit command, click **Cancel**.

Using the Polaris Shortcut Bar

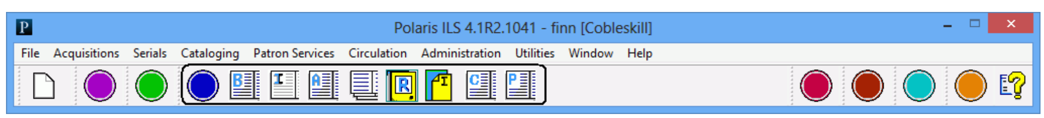
When you first log on to the Polaris staff client (for instructions, see "Start and log on to the Polaris staff client" on page 6), you see the Polaris Shortcut Bar, which is the starting point and navigational tool for library staff. The Polaris Shortcut Bar consists of a menu bar with menus organized by subsystem, and a toolbar with round icons that provide alternate ways to access Polaris functions.

Tips:
Use the following shortcut keys to access menus:
ALT+F - File
ALT+A - Acquisitions
ALT+S - Serials
ALT+C - Cataloging
ALT+P - Patron Services
ALT+R - Circulation
ALT+M - Administration
ALT+U - Utilities
ALT+H - Help
If you use a shortcut key to access a menu, the keys for the functions are underlined. For example, if you select **ALT+A** for the Acquisitions menu the F is underlined in **Funds**. Press **F** to open the Find Tool and search for Fund records. For more shortcut keys, see **"Basic Shortcut Keys"** on page 148**.**

To access a subsystem menu, you can press shortcut keys or use the mouse and click a menu title. You can also click one of the color-coded round icons (dark blue for Cataloging), and the record icons appear. Click the icon borders (handles) to expand, contract, and reorder the toolbar.



Display or hide the subsystem buttons by clicking the round icon or by dragging the handle. Hover the cursor over an icon to see the name of the record. Create a two-level toolbar by dragging down the round icon or handle. When you close Polaris and log back on, the Shortcut Bar returns to its default display.



Using Polaris Menus

The Polaris Shortcut Bar contains the following menus:

Note:
When you select a record type from a subsystem menu, the Polaris Find Tool appears. See "Finding Polaris Records" on page 33.

- **File** - Select options from the **File** menu to create a new record, log off, or exit Polaris. When you select **File, New**, the New dialog box appears. For detailed instructions, see "Creating New Records in Polaris" on page 81.
- **Acquisitions** - Select options from the **Acquisitions** menu to do acquisitions tasks. See "Starting an Acquisitions Task" in the *Polaris Acquisitions Guide 4.1R2*.
- **Serials** - Select options from the **Serials** menu to do serials tasks. See "Start a Serials task" in the *Polaris Serials Guide 4.1R2*.
- **Cataloging** - Select options from the **Cataloging** menu to do cataloging tasks. See "Finding Cataloging Records" in the *Polaris Cataloging Guide 4.1R2*.
- **Patron Services** - Select options from the **Patron Services** menu do patron services tasks. See "Patron Services on the Shortcut Bar" in the *Polaris Patron Services Guide 4.1R2*.
- **Circulation** - Select options from the **Circulation** menu to do circulation tasks. See "Patron Services on the Shortcut Bar" in the *Polaris Patron Services Guide 4.1R2*.
- **Administration** - Select options from the **Administration** menu to do administration tasks. See "Accessing Administration Records" in the *Polaris Administration Guide 4.1R2.*
- **Utilities** - Select options from the **Utilities** menu to do certain tasks. For information on the options available from the **Utilities** menu, see the following topics:
  - **Reports and Notices** - See "Using Polaris Standard Reports" on page 98 for general information on running reports.
  - **Importing** - For information on importing bibliographic or authority records, see "Setting Up Import Profiles and Importing Records" in the *Polaris Cataloging Guide 4.1R2*. For information on importing events, see "Importing Events for Community Profiles" in the *Polaris Community Profiles Guide 4.1R2*.
  - **Exporting** - See "Exporting Cataloging Records" in the *Polaris Cataloging Guide 4.1R2*.

- **Cataloging Processing -** This menu option has a submenu with the following options:

  - Purge Cataloging Records - See "Purge cataloging records" in the *Polaris Cataloging Guide 4.1R2*.

  - Bibliographic Bulk Change Queue - See "Check the bulk change queue and run the report" in the *Polaris Cataloging Guide 4.1R2*.

  - Authority Create Links Queue or the **Authority Update Links Queue** - See "Check the logs of the new or updated authority links" in the *Polaris Cataloging Guide 4.1R2*

  - Create Unlinked Bibliographic Record Set and **Create Unlinked Authority Record Set** - See "Cleaning Up the Catalog" in the *Polaris Cataloging Guide 4.1R2*.

- **Quick Circ Item Records** - See "Circulating Ephemeral Items" in the *Polaris Patron Services Guide 4.1R2*.
- **Link to Supplier Databases** - See "Add links to supplier databases" in the *Polaris Acquisitions Guide 4.1R2*.
- **Update Currency Exchange Rates** - See "Update the currency exchange rate for a foreign currency" in the *Polaris Acquisitions Guide 4.1R2*.
- **Label Manager** - See "Setting Up Labels" in the *Polaris Cataloging Guide 4.1R2*.
- **Mailing Label Manager** - See "Creating Patron Mailing Labels" in the *Polaris Patron Services Guide 4.1R2*.
- **Credit Card Payment Manager** - See "Managing Credit Card Orders" in the *Polaris Patron Services Guide 4.1R2*.
- **URL Detective** - Open the URL Detective.
- **Web Browser** - See "Setting a Default Web Page" in the *Polaris Administration Guide 4.1R2*.
- **Help** - See "Using Online Help" on page 29.

Records Listed in Polaris by License

Course Reserves, Feature It (Promotions), Community Profiles, 3M Ebook Integration, and other products each require a separate license. If these products are not licensed, the records associated with the products do not appear in menus, Find Tool Objects lists, or New Record lists. If these products are licensed, the associated records are listed as selections in menus and lists.

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Accessing licenses available in Polaris

Follow these steps to view the licenses available to the library.

1. Select **Help, About Polaris** from the Polaris Shortcut Bar.

   The About Polaris window appears.

2. Select the link next to **Application Server** from the About Polaris window.

   The Polaris Properties window appears.

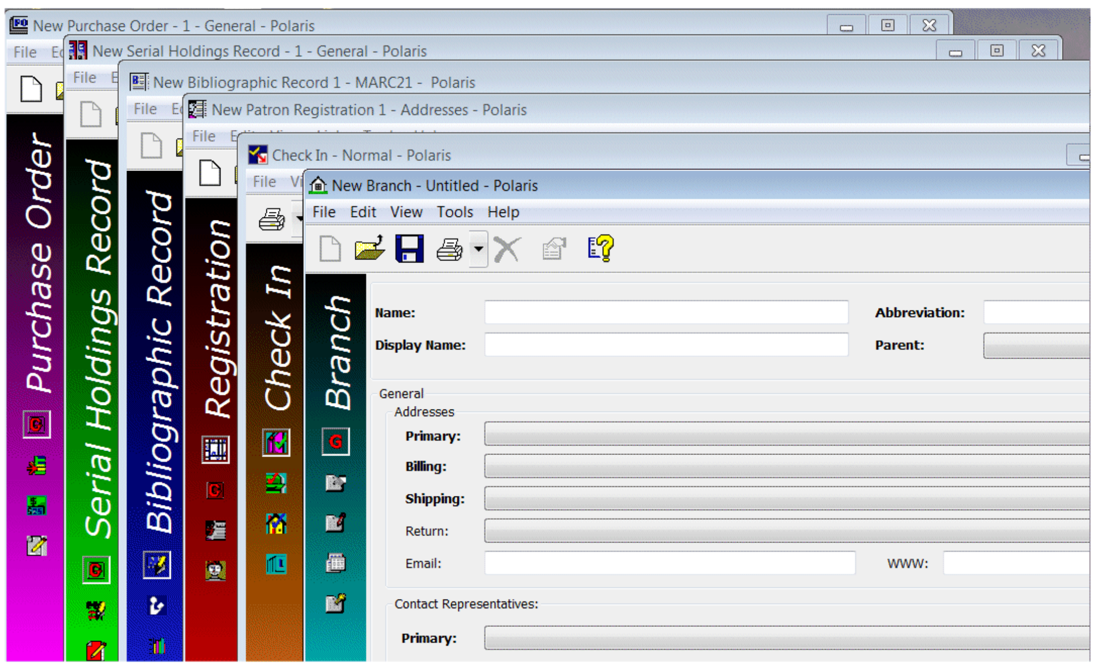
3. Select the **Licenses** tab from the Polaris Properties window.

   The available and enabled licenses for the Polaris application are displayed in the window.

Using Polaris Workforms

In Polaris, the windows where you create, view, and edit records are called workforms. Each workform has its own menu bar and toolbar for performing the tasks related to the record or records displayed in the workform. Some workforms display a single record, such as the Bibliographic Record workform, and you can edit only the data related to that record. Other workforms, such as the Bibliographic Record Set workform, list more than one record and you can perform actions on multiple records from the same workform.

Workforms have color-coded banners along the left side that correspond to the subsystem. For example, the Bibliographic Record workform has a dark blue banner.



See the following topics:

- “Working with Multiple Workforms” on page 14
- “Workform Features” on page 14
- “Workform Actions” on page 15
- “Using Date Pickers” on page 16

Working with Multiple Workforms

You can have multiple workforms open simultaneously, and switch from one workform to another by clicking the workform or by pressing **ALT+TAB**. You can also use the following options on the **Window** menu:

Tip:
To use the key combinations to maximize, minimize, or close multiple workforms, the cursor must be in the Polaris Shortcut Bar.

- **Cascade** - **ALT+W+C** - Restores minimized Polaris windows to the desktop. Each consecutive window is positioned below and to the right of the previous window.
- **Minimize All** - **ALT+W+M** - Minimizes all Polaris desktop windows and places each with an icon on the Windows taskbar.
- **Close All** - **ALT+W+A** - Closes all open Polaris windows. However, the Shortcut Bar remains displayed and available for use.

Workform Features

All Polaris workforms have a menu bar and a tool bar with options to perform tasks on the displayed record, link to other records, create new records, see record properties, and get online help. Many workforms have more than one view, and you change the workform view by selecting an option from the **View** menu, by clicking an icon on the left banner of the workform, or by pressing **CTRL+TAB** on the keyboard. The status bar at the bottom of a workform displays information such as **The record was saved successfully**.

Workforms contain fields in the form of drop-down list boxes, text boxes, check boxes, date pickers, or other types of controls. For more information on entering dates in Polaris workforms, see "Using Date Pickers" on page 16.

You can move from one field to another in a workform using the mouse or the **TAB** key. If you use the **TAB** key to go to a list box, press the **ALT** key and the down arrow key to open the list box. For more information on using the keyboard to navigate through workforms, see "Basic Shortcut Keys" on page 148.

You can enter or edit data in boxes with a white background; boxes with gray backgrounds are read-only for system-generated information or information that you cannot edit. Bold labels indicate required fields, and the record cannot be saved without information in these fields. If the bottom right corner of the workform has a dotted arrow , you can resize the workform by dragging the corner.

If a workform has a **Find** button, the Find Tool opens with the appropriate type of record selected. For example, the **Title** field on the Item Record workform has a **Find** button that opens the Find Tool with **Bibliographic Records** selected in the **Object** box. For more information about the Polaris Find Tool, see "Finding Polaris Records" on page 33.

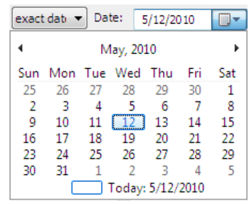
Workform Actions

You can do the following actions on Polaris workforms.

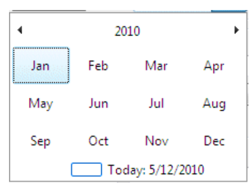
- **Save the displayed record** - Select **File, Save**, press **CTRL+S**, or click .
- **View the record's properties** - Select **File, Properties** to view the record's property sheet. See "Viewing a Record's Properties" on page 18
- **Delete the record** - Select **File, Delete**, press **CTRL+D**, or click . See "Deleting Records" on page 85.
- **Create a new record** - Select **File, New**, press **CTRL+N**, or click . See "Creating New Records in Polaris" on page 81.
- **Open another record** - Select **File, Open**, press **CTRL+O**, or click . The Find Tool appears with the record type selected. See "Finding Polaris Records" on page 33.
- **Print the workform** - Select **File, Print**, press **CTRL+P**, or click . See "Printing Records" on page 22.
- **Link to other related records** - If the record is linked to other records, you can select the **Links** menu and select the type of record. If only one record of the selected type is linked to the record, the record opens in its workform. If multiple records of the selected type are linked to the record, the linked records are displayed in a list box. See "Linking to Other Records" on page 20.
- **Get help with Polaris** - Select **Help**, press **F1**, or click . See "Using Online Help" on page 29.
- **View the record's properties** - Select **File, Properties**, press **F8**, or click . See "Viewing a Record's Properties" on page 18.
- **Minimize the workform** - Click .
- **Maximize the workform** - Click
- **Close a workform** - Select **File, Close**, press **ALT+F4**, or click .

Using Date Pickers

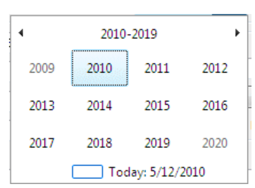
Enter dates in Polaris workforms and dialog boxes by selecting them from a date picker calendar control. To open the calendar, click the down arrow next to a date box. The default date selected in the calendar is today's date, which is displayed in the bottom of the calendar. Select a different date in the same month, or move to the previous or next month by clicking the right or left arrows at the top of the calendar. To get back to today's date, click on it.



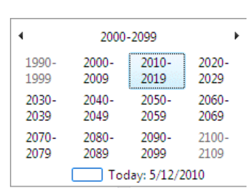
To go to a date in a different month, click on the date at the top of the calendar to display months of the year, and select a different month. To go to the previous or next year, click the arrows at the top of the calendar.



To select a different year, click the year at the top of the calendar. The calendar changes to display the years in the current decade. Select a different year. To go to the next or previous decade, use the left and right arrows at the top of the calendar.



To select a different decade, click the decade at the top of the calendar. The calendar changes to display decades. Select a different decade.



Date Picker Keyboard Shortcuts

You can use the following keys to select dates in the date picker calendar control.

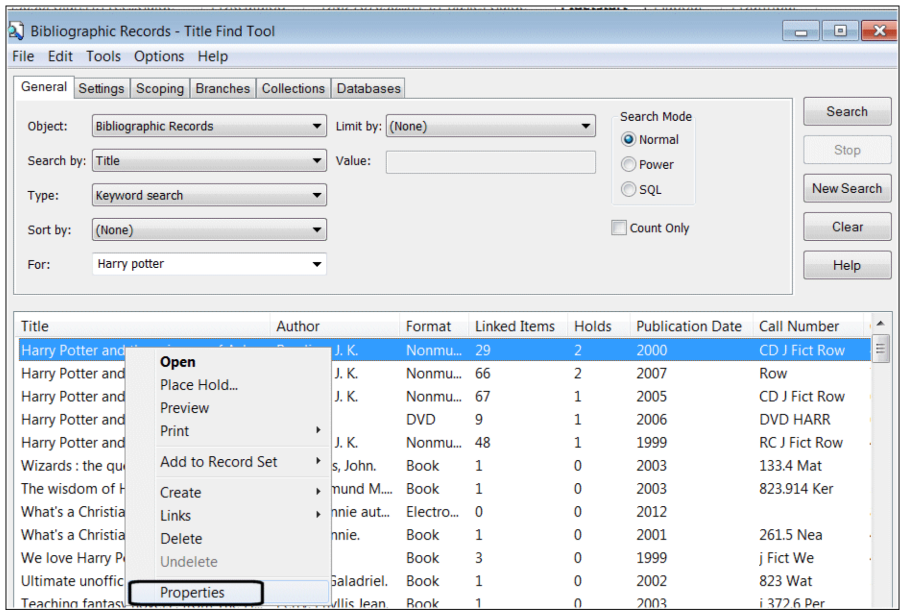
Note:
The keyboard commands and resulting actions listed below are for the calendar control as it is first displayed with the days of the month. You can also use these keys to move around in the calendar displaying the months of the year, the years in a decade, or decades.

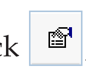
- Left arrow - Select the previous day
- Right arrow - Select the next day
- Up arrow - Select the same day in the previous week
- Down arrow - Select the same day in the next week
- Page Up - Select the same day in the previous month
- Page Down - Select the same day in the next month
- Home - Select the first day of the current month
- End - Select the last day of the current month
- Ctrl + Page Up - Select the same day in the previous month
- Ctrl + Page Down - Select the same day in the next month

Viewing a Record's Properties

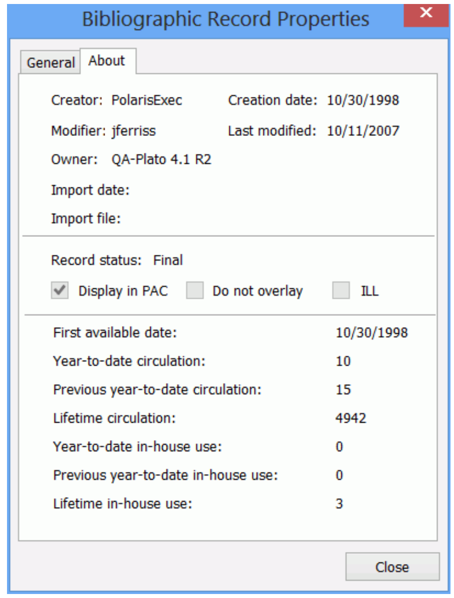
You can see information such as the record's creation and modification dates from the Properties dialog box, but you cannot edit the information. To see a record's properties, use one of the following methods:

- From the Find Tool results list or a list of records, right-click a record and select **Properties** from the context menu.



- From a workform, select **File**, **Properties**, click , or press **F8**.The Properties sheet appears. The General tab of the record's properties sheet contains general information about the record.

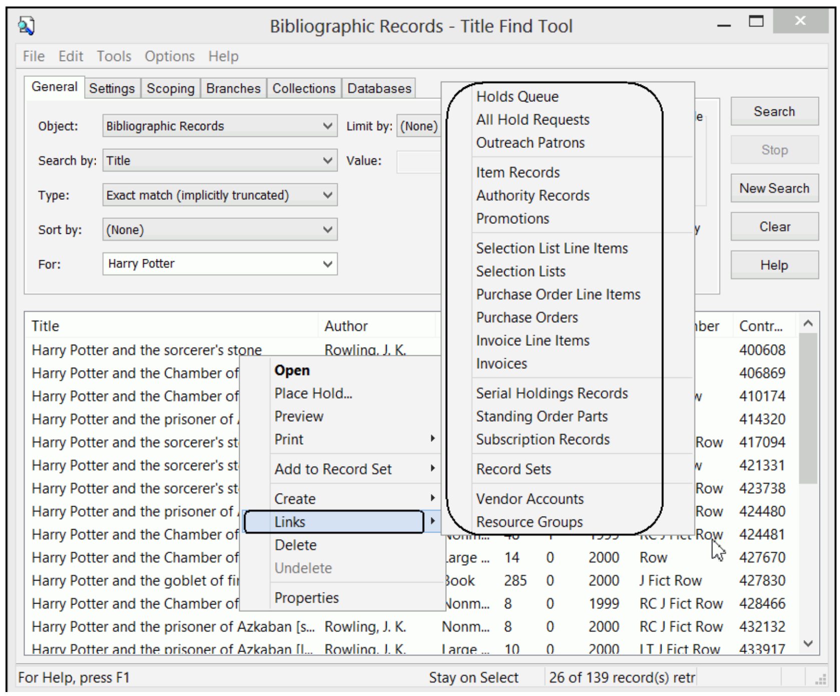
The About tab of the properties sheet contains information such as: the creator and modifier of the record; the dates the record was created and modified; the owner and record status; and statistics.



Linking to Other Records

Tip:
In the Find Tool results list, press the up or down arrow keys to locate the record, and press **SHIFT+F10** to open the context menu. Use the arrow keys to navigate through the context menu options, and press **ENTER** to select an option. For more keyboard shortcuts, see "Basic Shortcut Keys" on page 148.

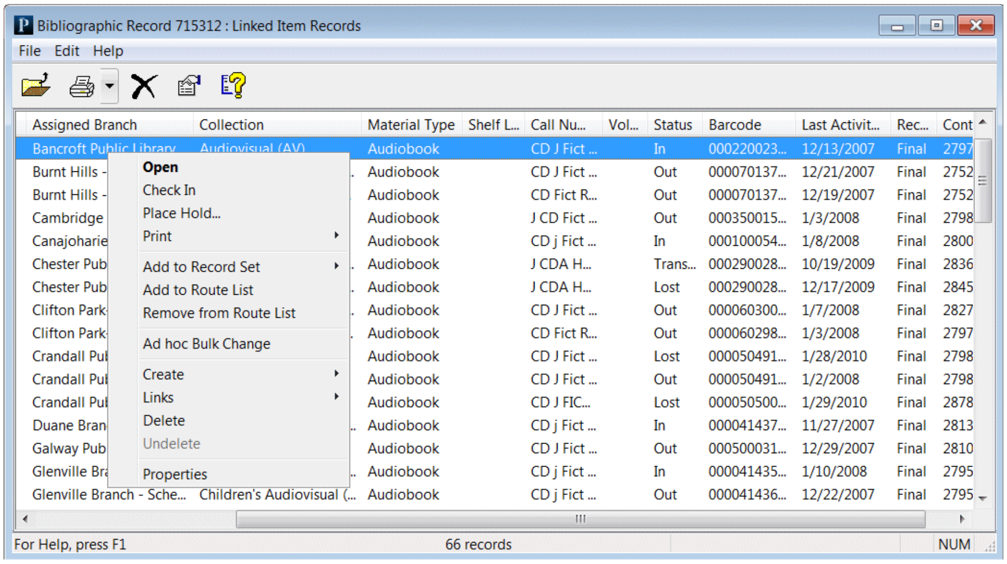
Certain Polaris records are linked to other records so that you can easily navigate from one record to another. For example, item records are linked to bibliographic records. To display linked records from an open workform, press **ALT+L** and type the first letter of the type of record, or select **Links, Existing** and select the type of record. You can also right-click a record listed in Find Tool search results to open the context menu, and then select **Links** and the type of record.



Tip:
You can expand the Find Tool results list and list boxes by dragging the bottom right corner of the window, and you can sort the columns by clicking on the column headings.

If only one record is linked to the record in the workform or in the Find Tool results list, it opens in the appropriate workform. If there are multiple linked records, they are listed in a linked list box.

You can click a column heading to sort the list box; drag a column border to expand the column; and select a record, right-click and perform a function or link to other records. Depending on the type of record, you can select multiple or all records in a linked list box, right-click and perform the same action on all the selected records. For example, you can display all the linked item records for a bibliographic record in the Linked Item Records dialog box, and add them all to a record set in one step.



Printing Records

You can print records in Polaris from the workform, from the Find Tool results list, or from a list box. The available printing options depend on the type of record. When you select a workform view or all views to print, the Print dialog box appears, and you click Print to print the view(s). The view printout contains all the fields in the view, whether the fields contain data or not.

Because workform view printouts are exact replicas of the view displayed on the screen, they are affected by the workstation's resolution and magnification settings. By default, the view printout is automatically printed in landscape. See "Opening and Exiting Polaris" on page 5 for more information on workstation display settings and Polaris. Some workforms have additional Brief or Full print options. When either of these options are selected, a formatted "report" appears in pdf format in Adobe Reader.

See the following topics:

- "Print a record from a workform" on page 23
- "Print selected entries in a workform list view" on page 23
- "Print search results from the Find Tool" on page 25

Print a record from a workform

Follow these steps to print records from a workform.

1. Use the Find Tool to locate and open the record you want to print.

   Note:
   For more information on using the Polaris Find Tool, see "Finding Polaris Records" on page 33.

Tips:
Select the printer portion of the print icon in the toolbar to print the current view. Select the arrow portion of the print icon to display the other print options.

Press **CTRL+P** to print the current view of the workform.
Press **CTRL+SHIFT+P** to print the list view
Or,
Press **ALT+F** to display the **File** menu, press **P** to display the print options, and press one of the following keys (the underlined letters in the print options correspond to the shortcut key):
C - Prints current view
L - Prints the list view
V - Prints all views of the workform

2. Select **File**, **Print** from the workform menu bar, and select an option in the list:

   Note:
   Additional options may be available depending on the type of record. For example, **Route Slip** is a print option available from the Serial Issue workform if the issue is on a routing list.

   - **Current View** - Prints the current view of the workform.
   - **All Views** - Prints all views of the workform. These are listed on the workform **View** menu, and represented by icons on the left side of the workform.
   - **List View** - If the workform has a list, the entire list will be printed. Sort the list by selecting a column heading, and the list will be printed in the sort order you selected.
   - **Brief** or **Full** - Some workforms, such as the Bibliographic Record and Community Record workforms have options to print formatted reports.

   The Windows Print dialog box opens when workform views are selected. Adobe Reader displays a pdf when Brief or Full is selected.

3. Click **Print** to print the record at the selected printer.

Print selected entries in a workform list view

Workforms with list views offer separate printing options for items in the list views. Follow these steps to print one or more records from the list view of a workform.

Tip:
To print the entire list view, press **CTRL+SHIFT+P**.

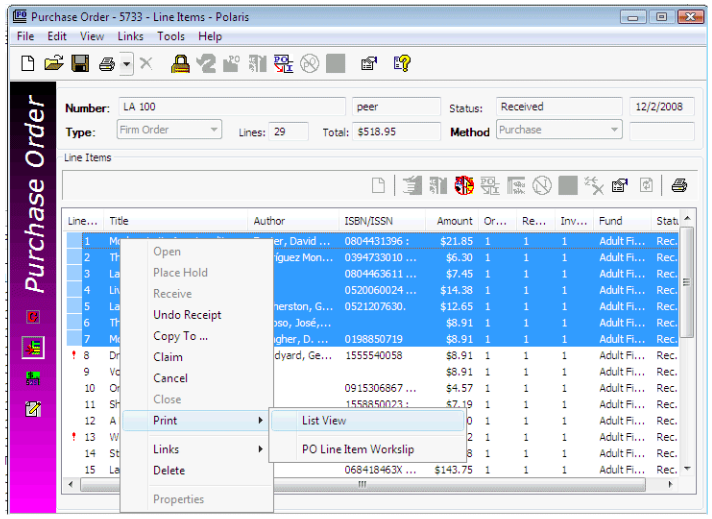
1. Use the Find Tool to locate and open the workform that contains the record you want to print.

   Note:
   For more information on using the Polaris Find Tool, see "Finding Polaris Records" on page 33.

2. Display the list view of the workform if it is not already displayed by selecting **View, List View**.

   Select the item or items to print.

3. Right-click, select **Print**, and select a print option.



Tip:
To print the list view itself, select an item in the list and click the printer portion of the print icon above the list view. If formatted print options are available for the selected item or items, select the arrow portion of the print icon to display the options.

The Windows Print dialog box appears.

4. Click **Print**.

The record is printed at the selected printer.

1-2-3

Print search results from the Find Tool

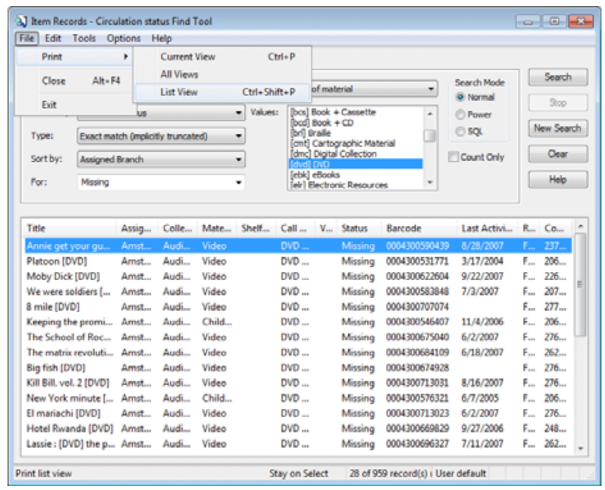
Follow these steps to print search results from the Find Tool.

Tip:
For information on searching for records in Polaris, see “Finding Polaris Records” on page 33.

1. Select the type of record, and enter your search criteria.

   The records are displayed in the Find Tool results list.

   Important:
   If you want to print a list of all the search results, press **CTRL+SHIFT+A** to retrieve all records that meet your search criteria before printing the list view. You may also need to increase the number of records that can be retrieved by changing the Retrieval Limit on the Settings tab. See “Doing a Browse Search” on page 53.



2. Select **File**, **Print**, and select a print option:

   - **Current View** - Prints the search criteria on the current tab of the Find Tool and a list of the items displayed in the window.
   - **All Views** - Prints the search criteria on all tabs of the Find Tool and a list of the items displayed in the window.
   - **List View** - Prints a list of all the results currently retrieved. You can adjust the column widths, or sort the list before printing. If you want to print all the results, press **CTRL+SHIFT+A** to load all the search results. Also, the **Retrieval Limit** may need to be increased on the Settings tab.

Tips:
Press **CTRL+P** to print the current view.
Press **CTRL+SHIFT+P** to print the list view.

3. Set the print parameters on the print window, and click **Print**.

   The Find Tool results are printed or saved in the format you selected.

Printing from List Boxes and Record Sets

Select **File, Print** or select specific records in the list box or record set, right-click and select an option from the context menu.

Encountering Permission Blocks

If you encounter a message that says you do not have permission to do a certain task in Polaris, you can either cancel the task or ask a supervisor or another staff member to override the permission block. The staff member must have the override profile set to **Yes** for the subsystem and permission to do the task for which you were blocked. If the record has a specific owner, the supervisor or staff member doing the override must be the record's owner or have permission to modify organizational-level records.

See the following topic:

- "Override a permission block" on page 26

Override a permission block

If you attempt to do a task in Polaris and encounter a message saying you do not have permission to do that task, do the following steps.

1. Click **Override>>** on the Polaris Permissions dialog box.

   The Polaris Permissions dialog box expands.

2. Ask someone with override ability to type her Polaris user name and password in the **Name** and **Password** boxes. If the domain is different from the domain that appears, type it in the **Domain** box.

3. Click **OK** to override the block.

   You can do the specific task.

Related Information

- **Override profiles** - In the Staff Member workform, the following staff-level profiles determine a staff member's ability to override permission blocks:
  - **Acquisitions/Serials profiles**

    Override acquisitions blocks - If set to **Yes**, the staff member can override acquisitions permissions blocks

    Override serials blocks - If set to **Yes,** the staff member can override serials permission blocks.
  - **Cataloging profile** - Override cataloging blocks - If set to **Yes**, the staff member can override cataloging permission blocks.
  - **Patron Services profile** - Override patron services blocks - If set to **Yes**, the staff member can override patron services permission blocks.
  - **Staff client profile** - Find Tool: Override SQL search blocks - If set to **Yes**, the staff member can override Find Tool SQL search blocks.
  - **Permissions** - For more information on setting permissions, see "Granting Permissions" in the *Polaris Administration Guide 4.1R2*.

Using Polaris Documentation

Polaris documentation includes the following resources:

- **User guides** cover Polaris functionality and how you can use it to facilitate your library's workflow.
- **Administration guides** provide reference information and procedures for Polaris Administration.
- **Online Help** has a searchable index as well as a text search feature. It includes the information covered in user guides and specific help for workforms.

Note:
In addition to the documentation provided by Polaris Library Systems, your library may develop its own documentation files and make them accessible from Polaris. For more information, see "Defining Online Documentation" in the *Polaris Administration Guide 4.1R2*.

This unit covers the following topics:

- "Using Guides" on page 28
- "Using Online Help" on page 29

Using Guides

Polaris guides include administration and reference manuals, as well as user guides for staff and patrons. The guides are available as Adobe® PDF files, for viewing online or printing, from the following locations:

- Polaris staff client
- Polaris application server
- Polaris Library Systems Web site at **www.polaristown.com**

See the following topic:

- “Access documentation from the Polaris Shortcut Bar” on page 28

Access documentation from the Polaris Shortcut Bar

Follow these steps to access a document from the Polaris Shortcut Bar.

Tip:
The location of the online documents is specified in Polaris Administration. For more information, see “Specify the location of online documents” in the *Polaris Administration Guide 4.1R2*.

1. Start and log onto the Polaris staff client.

   The Polaris Shortcut Bar appears.

2. Press **ALT+H** and press **D**, or click **Help, Online Documents** from the Polaris Shortcut Bar.

   Either a document opens in Adobe® Reader®, or the documentation index page opens, displaying multiple documentation links.

3. If multiple documentation links are displayed, select the document that you want to view or print.

   The document opens in Adobe Reader.

   Note:
   Several Polaris guides include keyboard shortcuts in a format convenient for photocopying and clipping. For example, see “Basic Shortcut Keys” on page 148 for a list of system-wide keyboard shortcuts.

Using Online Help

When you select Help from the Polaris Shortcut Bar, the menu lists the following options:

- **Polaris Topics** - Look up any topic in Polaris. See "Use topic-level Help in the staff client" on page 29.
- **Search for Help on...** - Search for a term anywhere in Polaris Help.
- **Shortcut Bar Help** - Information regarding the Polaris Shortcut Bar. See "Using the Polaris Shortcut Bar" on page 9.
- **Online Documents** - Access the Polaris guides in pdf format. See "Access documentation from the Polaris Shortcut Bar" on page 28.
- **Library Documentation** - Access the library documentation if your library provides its own documentation for Polaris.
- **Obtaining Technical Support** - Select this option to go to the log-in page at **www.polaristown.com**.

Tip:
The links to the Polaris online documents and the library's documentation (if any) are defined in Polaris Administration. See "Defining Online Documentation" in the *Polaris Administration Guide 4.1R2*.

Use topic-level Help in the staff client

Use topic-level Help when you want to find information on any Polaris function.

- Open topic-level Help, by selecting one of the following options:
  - From the Polaris Shortcut Bar, press **ALT+H** or and press **P**, or select **Help, Polaris Topics**.
  - From the Find Tool, select **Help, Find Tool Topics**.
  - From a workform, select **Help,** *Subsystem* **Help Topics**.

  The Polaris Staff Help window appears. The location from which you access Help determines the content that displays in the window. If you access Help from the Polaris Shortcut Bar, the Help window opens with topics relating to the Shortcut Bar and Polaris menus. If you access Help from the Find Tool, the Help window opens with topics relating to using the Find Tool. If you access Help from a workform, the Help window opens with topics relating to the workform's subsystem. You can navigate to other topics no matter how you first accessed the Help window.

  The right pane of the Polaris Staff Help window displays topic information. The left pane is used for searching and navigation.

- To navigate through the staff Help table of contents, do the following:

  Note:
  The table of contents displays help topics in a tree view as they would be organized in a book. The table of contents shows the book hierarchy and how topics are related to each other, and lets you progress from topic to topic. If you have a topic displayed in the right pane, you can click the Contents tab to see where the topic appears in the hierarchy.

- Click the **Contents** tab in the left pane.
- Double-click the main topic to display subtopics.
- Double-click the main topic to hide subtopics.

- To use the index, do the following:

Note:
The index displays help topics in alphabetical order. Use the index for most searches unless the term is uncommon. You may also find useful cross-references and alternate terms.

- Click the **Index** tab in the left pane.
- Type the term you are searching for (or the first few letters) in the **Type in the keyword to find** box.
- The index displays the alphabetical part of the list that includes the term you typed.
- Double-click the topic in the list, or select the topic and click **Display**.
- The topic appears in the right pane.
- To search for a keyword term, do the following:

Note:
The Search feature is most useful for uncommon terms. For example, you could use the Search tab when looking for information on Z39.50. But if you are looking for information on bibliographic records, you will get more useful results using the Index tab.

- Click the **Search** tab in the left pane.

Tip:
You can display the Search page directly from a workform or the Polaris Shortcut Bar by selecting **Help, Search For Help On**.

- Type the term you are searching for (or the first few letters) in the box.
- Double-click the entry, or select the entry and click **Display**.
- The topic appears in the right pane. Each instance of the term is highlighted.

- To navigate through a topic displayed in the right pane, use these controls:
  - Press the down arrow or up arrow on the right side of the window to scroll through the topic.
  - Click links in the topic information to display related information.
  - Click the book icons in the table of contents on the left panel to see other topics.
- See where the displayed topic appears in the table of contents.

Tip:
When you search using the **Search** or **Index** tab, and you need to see the topic in context or you need to go back to an overview, you can click the **Contents** tab.

- Search for a topic.
- With the topic displayed in the right pane, click the **Contents** tab to see the topic in the tree view. You can select another heading to see other procedures or an overview.

- To save a topic link to frequently access the topic, do the following:
  - Display the topic.
  - Click the **Favorites** tab in the left pane.
  - If you want to change the name of the topic link, type the new name over the existing name in the **Current topic** box.
  - Click **Add**.

  The new topic link appears in the Topics list.

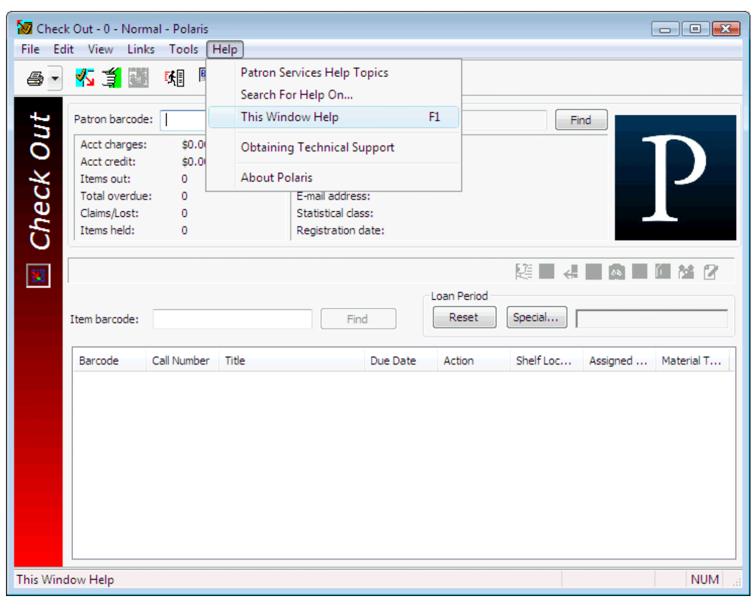
  Notes:
  - To display a Favorite topic, select the topic link in the Topics list, and click **Display**.
  - To delete a topic link from Favorites, select the topic link in the Topics list, and click **Remove**.
- To print from the Help file, do the following:
  - Right-click the topic you want to print.
  - Select **Print** from the context menu.
- To copy from the Help file, do the following:
  - Select the text you want to copy.
  - Right-click and select **Copy** from the context menu.
- To leave online Help, click **X** to close the Polaris Staff Help window.

Get quick help with a workform

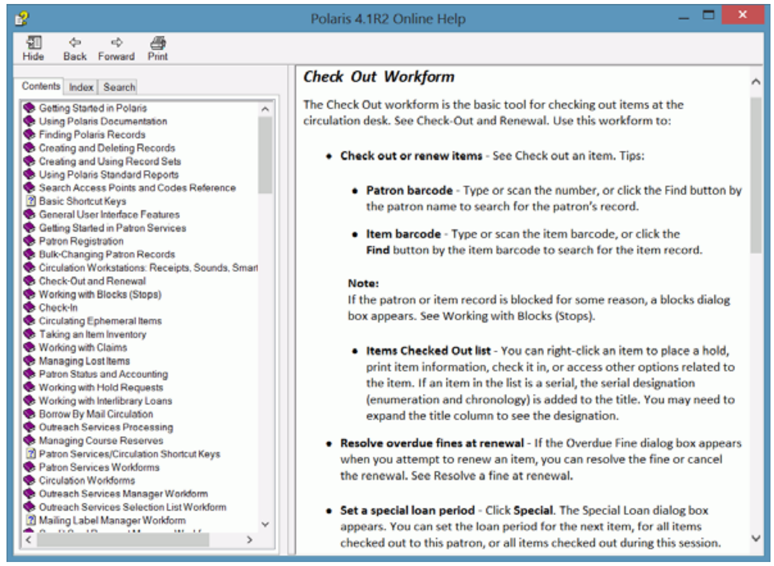
Use workform-level Help when you want to find specific information about a workform and the tasks that are done using the workform.

Tip:
Click to display Help for a workform, or press **F1**.

1. From a workform, select **Help, This Window Help**.



The Polaris Staff Help window appears with information about the workform.



2. Click a procedure link to see more information about a task, or use the left pane to navigate to other topics.

Finding Polaris Records

You use the Polaris Find Tool to search for existing records in your local database and to perform actions with these records without having to open them. You can use the Find Tool to do a basic search, or you can use various options to focus your search more precisely. If your library has established connections to other remote databases, you can also use the Polaris Find Tool to search these databases.

> **Note:**
> For information about searching for Polaris Administration records, such as libraries, branches, staff members or workstations, see "Find an administration record" in the *Polaris Administration Guide 4.1R2*. For information about searching for permissions, see "Finding Permissions" in the *Polaris Administration Guide 4.1R2*.

This unit covers the following topics:

Polaris Find Tool Overview

With over 600 access points as well as relevancy ranking, sorting, limiting, proximity searching, CCL queries, scoping, SQL searches, and automatic suggestions, the Polaris Find Tool provides search options for all types of tasks. You can save user defaults for the types of searches you do most often.

The "count only" option gives you a simple count, such as the number of DVDs in a certain collection, without returning the search result list. You can add records to a record set from a "count only" search without returning the records in a the results list, or you can select the records from the results list and put them in a record set.

Your library can set up Z39.50 targets for external databases that you can search directly from the Find Tool - allowing you to save new records to the local database in one step.

If you have the required permissions, you can create and save a SQL search in the Polaris Find Tool. SQL searches are used for data retrieval only; data cannot be manipulated through the Find Tool. Once a SQL query is saved, other staff members can use the saved search even if they do not have permission to create and save one.

In addition to the many methods and access points available for searching in the Find Tool, you can perform tasks on single or multiple records listed in search results, provided you have the required permissions. If you select a single record, you can select **Links** to access the linked records. From the bibliographic search results, you can select **Preview** to see the titles' circulation statistics. Other options include checking in multiple serial issues and bulk-changing multiple item records.

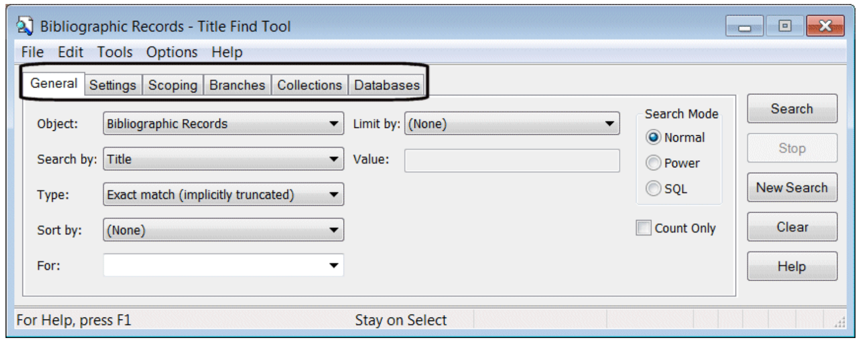
You can also use the Polaris Find Tool to create quick reports from the search results list. For example, if the library needs to see a list of items in a certain collection that have not circulated in the last three years, you can create a report in the Find Tool by printing the results list.

See the following topics:

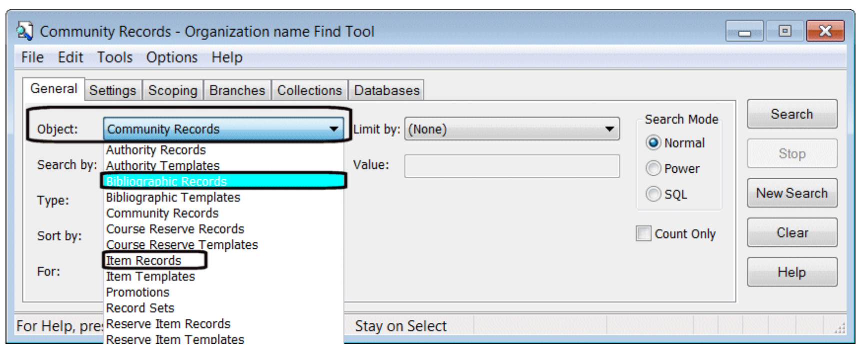
- "Find Tool Tab Display" on page 35
- "Set Find Tool results limits" on page 36
- "Get a count of records without displaying them" on page 37
- "Customize the Find Tool by user" on page 38

Find Tool Tab Display

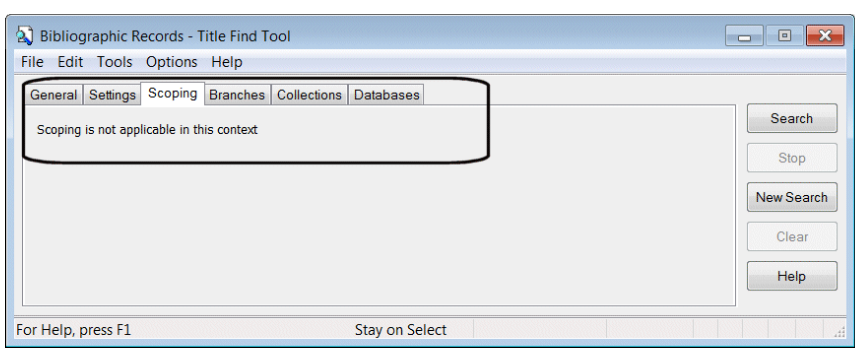
When you search for bibliographic or item records, all the Find Tool tabs are displayed: General, Settings, Scoping, Branches, Collections, and Databases.



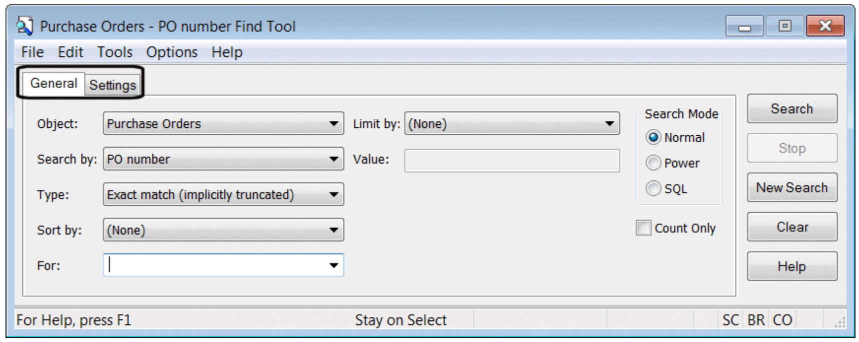
All tabs are also displayed when you search for an object that has bibliographic or item records in the **Object** list. For example, when you search for Community Records, Bibliographic Records or Item Records can be selected in the **Object** list.



However, if the tab cannot be used in the context of the search, a message appears on the tab. For example, if you are searching for a bibliographic record using a Browse search type, and you select the Scoping tab, the message **Scoping is not applicable in this context** appears.



For most other records (objects), such as Acquisitions, Serials, and Patron records only the General and Settings tabs are displayed.



Set Find Tool results limits

The greater the number of records retrieved and displayed in the results list, the slower the retrieval time. To ensure optimal performance, a default retrieval limit is set in Polaris Administration, but you can change the limit for a specific search. You can also increase the amount of time the system will search before timing out. For information on Find Tool error messages and how you can resolve them, see "Resolving Find Tool Search Issues" on page 39.

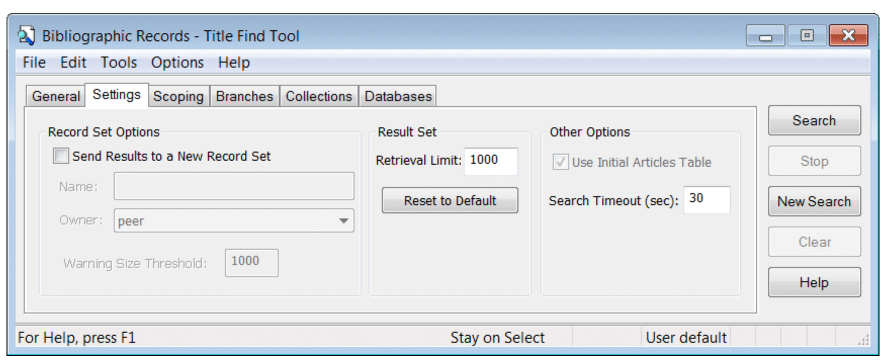
Note:
For more information on the Find Tool profiles in Polaris Administration, see "Setting Find Tool Profiles" in the *Polaris Administration Guide 4.1R2*

Tip:
These settings remain in effect until you click **New search** or close the Find Tool. Changing the settings here does not affect the default settings in Polaris Administration. You can restore the default settings by clicking **Reset to Default**.

Follow these steps to specify how you want retrieval results to be handled.

1. Open the Find Tool.
2. Create your search query, but do not click **Search** yet.
3. Select the **Settings** tab.

   The Settings tabbed page appears.



4. If you want to create a record set from the results, see "Create a record set from all the Find Tool results" on page 89.
5. If you want to change the default settings, do the following:

Tip:
If the number of records returned in a search is equal to the retrieval limit, increase the retrieval limit to make sure all records that meet your search criteria are retrieved.

- Type a different number to change the number of records that are retrieved in the **Retrieval Limit** box. The default limit is set in Polaris Administration with the profile **Find Tool: Default number of records to return in a result set**. See "Set Find Tool defaults" in the *Polaris Administration Guide 4.1R2*. To set the retrieval limit back to the default, click **Reset to Default**.
- Type a different number in the **Search Timeout (sec)** to increase or decrease the amount of time (in seconds) that the system will search before timing out. The default is 30 seconds.

Tip:
If you want Polaris to sort records, you must select a **Sort by** option on the Find Tool's General page.

- Check or clear the **Use Initial Articles Table** check box. If this box is checked, the initial article in a title is ignored if that article is defined in the Initial Articles table (see "Defining Leading Articles" in the *Polaris Administration Guide 4.1R2*).

Get a count of records without displaying them

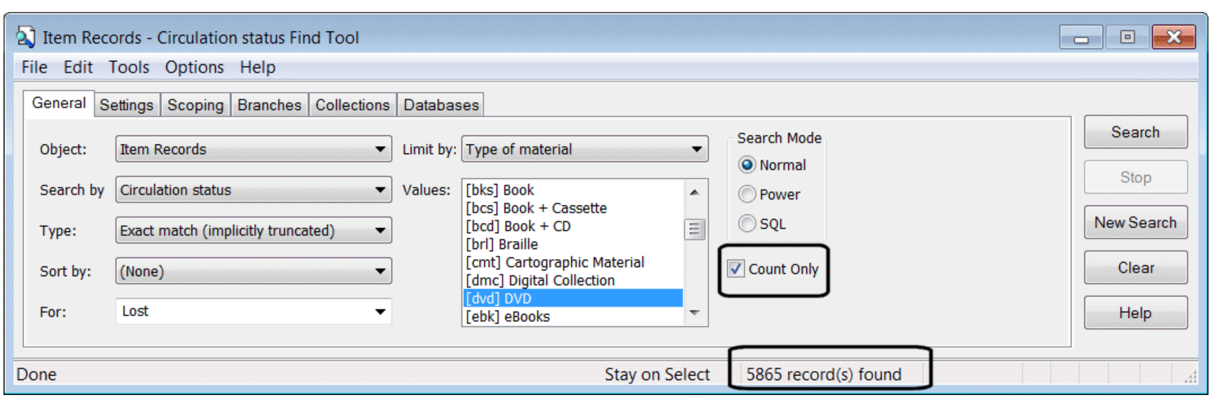
You can use the **Count only** option with any type of search, including an SQL search. Follow these steps to search for specific types of records and get a count of the records without displaying them in a list.

1. Enter your search criteria on the Find Tool- General tabbed page.
2. Select **Count only**.
3. Click **Search**.

   A count of the records appears in the status line of the Find Tool.

   Note:
   When you select **Count only**, the **Retrieval Limit** on the **Settings** tab is ignored so that the count includes all records that meet the selected criteria, but the **Search timeout** setting is still in effect.

Tip:
If you want to add the records to a record set, go to the **Settings** tab and enter the information for the record set before clicking **Search**.



Customize the Find Tool by user

You can set the Find Tool to default to the same selections in the **Search by, Type, Sort by**, and **Limit by** boxes each time you search for the same type of record. The settings are associated with your log-in information and remain the same each time you log in with the same user ID. You can still change the search criteria at any time.

Values that can be selected from drop-down lists are also saved, but free-text values are not. For example, if you select **Genre** in the **Search by** or **Limit by** box, enter a free-text value, and select **Save as User Default**, **Genre** will be retained, but not the free-text value.

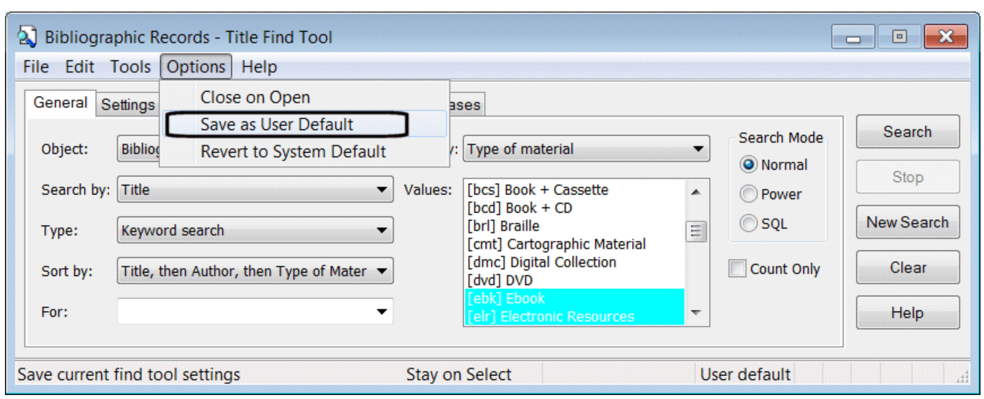
Follow these steps to customize the Find Tool.

1. Open the Find Tool.
2. Select the record type you want to find.
3. Select an option from the list in the **Search by** box.
4. If you want the search results sorted the same way every time you search for that type of record, select an option in the **Sort by** box.
5. If you want the search results limited in the same way every time you search for that type of record, select an option in the **Limit by** box, and select a value in the **Limit by** values box.

   Note:
   Limit by values selected from a drop-down list are saved in the user default, but free-text values are not saved. For example, if the **Limit by** selection is **Subject** and you enter **history** in the **Values** box, the value is not saved.

6. Select **Options, Save as User Default** from the Find Tool menu bar.

Tip:
If you save a Power search as the user default, the Find Tool will open to the Power Search tab the next time you search for the same type of record, but the search criteria are not saved.

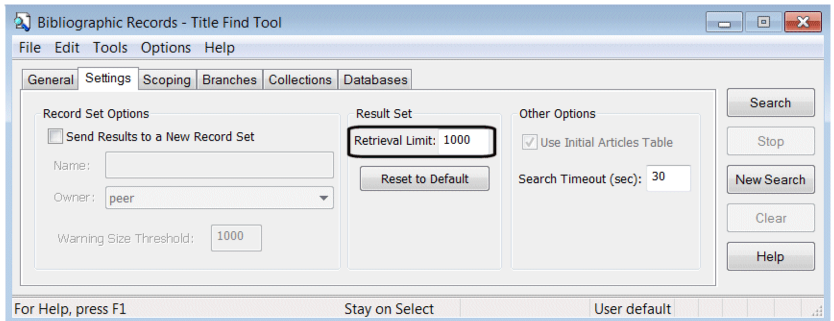


The Find Tool is customized to search for the record by the option you selected in the **Search by** box. To set the search by option back to the default for the record type, select **Revert to System Default**.

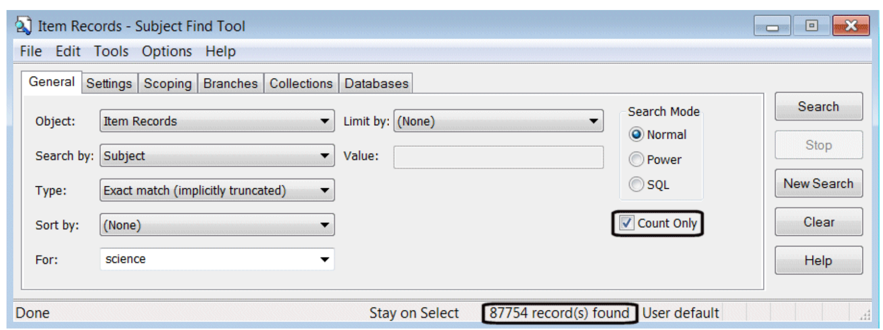
Note:
If you set user defaults for the bibliographic or item record Find Tool, these defaults are in effect in the Find Tool shortcuts (**F12** for bibs and **Ctrl+Alt+F9** for items).

Resolving Find Tool Search Issues

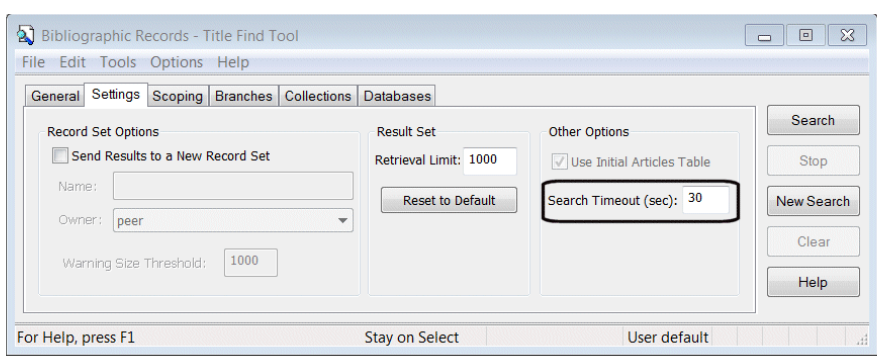
- If you enter the search criteria and the results are fewer than you expected, try the following:
    - Go to the Settings tab and increase the number in the **Retrieval Limit** box. This resets the retrieval limit for the current search only. If you select New Search, the retrieval limit reverts to the default set in Polaris Administration.



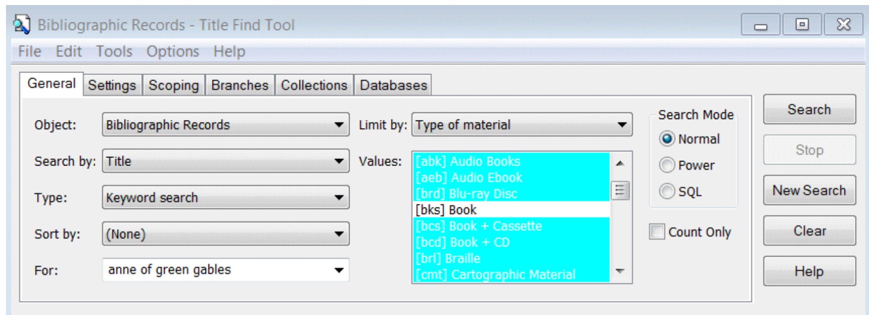
-
    - Do the same search again, but select **Count only**. This will give you the actual count of all the records that meet your search criteria, regardless of the number in the **Retrieval Limit** box.



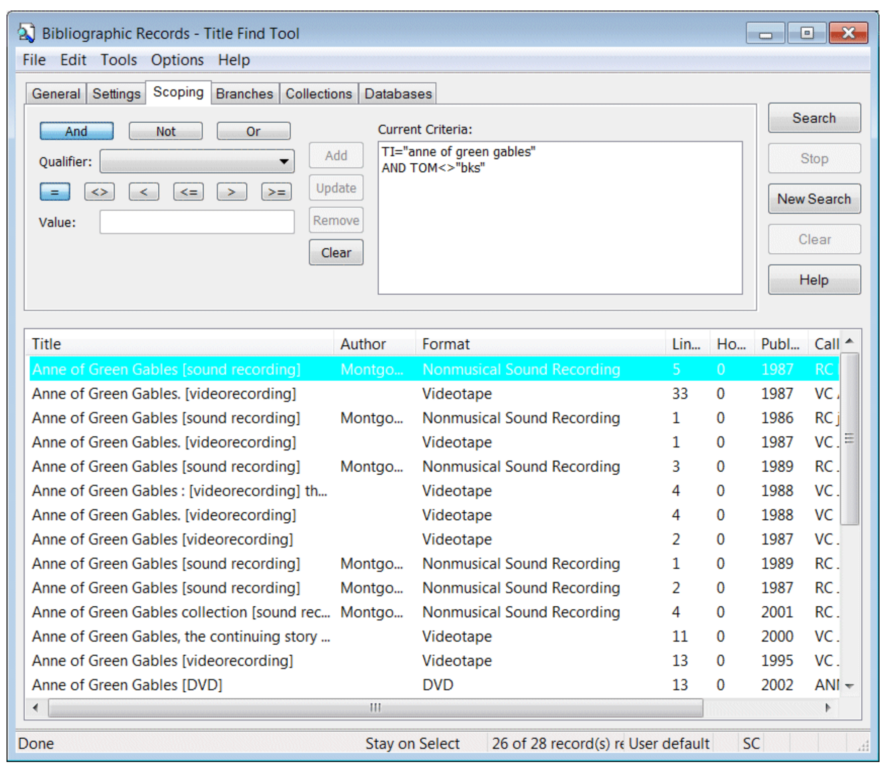
- If the search times out, go to the Settings tab and increase the number in the **Search Timeout (sec)** box.



- If you enter the search criteria, and you encounter a CCL Syntax error that states, **Invalid Search. Please verify the query and then resubmit the search.**, you can enter the primary search criteria on the General tab and then use the Scoping tab to refine the search.
  - For example, the **Invalid Search** message appears if you select **Type of material** in the **Limit by** box and select all values except for **Book**. In this case, the **Limit by** option is being used to exclude the **Book** type of material, but include all other values.



  - Instead of using the **Limit by** option to exclude a specific type of material, you could enter the primary search criteria, on the General tab, then go to the Scoping tab to exclude the book format. The search results display the bibliographic records with that title in every format except book.



Using Find Tool Results Lists

Once the search results are retrieved, you can scroll through the list to display additional records, or press **CTRL+SHIFT+A** to automatically retrieve all records. The status bar displays **Done** and indicates the number of records retrieved.

Depending on the Retrieval Limit set in the Find Tool Settings tab, the total number of records retrieved may not equal the number of records in the database that meet the criteria you entered. The default retrieval limit is set in Polaris Administration, but you can change it temporarily if the search is likely to exceed the retrieval limit. See “Set Find Tool results limits” on page 36.

From the Find Tool results list, you can select records and open them, perform actions on the records by right-clicking and selecting options from the menu, link to other records, send the records to a record set, or print the results list for a quick report.

Important:
Search results, except for browse title and browse call number searches, may be filtered so the results list includes only those records that you have permission to access. For more information about setting permissions in Polaris, see “Granting Permissions” in the *Polaris Administration Guide 4.1R2*.

See the following topics:

- “Use the context menu in the Find Tool results list” on page 41
- “Link to other records from the Find Tool results list” on page 42
- “Send search results to a record set” on page 43

Use the context menu in the Find Tool results list

Follow these steps to perform actions on records from the Find Tool results list without opening the records.

1. Search for the record or records using the Find Tool.

   The records are displayed in the results list.

2. Select the record and right-click to display the context menu.

   The following options may be available depending on the record type:

   Note:
   Not all options are available for all types of records, and some options are available only for specific records. For example, you can check in serial issues from the Find Tool results list.

   - **Open -** Opens the record in the appropriate workform.
   - **Place Hold -** Place a hold request for the title or item.

Tip:
Press the up or down arrow keys to locate the record, and press **SHIFT+F10** to open the context menu. Use the arrow keys to navigate through the context menu options, and press **ENTER** to select an option. For more keyboard shortcuts, see “Basic Shortcut Keys” on page 148.

- **Preview -** See the brief bibliographic display, circulation statistics, and all the linked item records in one view.
- **Print -** Select **List View** to print the list of items in the results list, or select another option. Some records, such as bibliographic records, can be printed in the full or brief format. See "Print search results from the Find Tool" on page 25.
- **Add to record set -** Select one or multiple item, bibliographic, authority, or patron records, and add them to a record set. See "Creating and Using Record Sets" on page 88.
- **Links -** Link to associated records. See "Link to other records from the Find Tool results list" on page 42.
- **Delete** - Select one or multiple records and delete them.
- **Undelete** - Select one or multiple records marked for deletion and undo the delete.
- **Create** - Create other linked records.
- **Properties** - Display a dialog box with information about the record.
- **Add to Purchase Order** - This option is available for bibliographic record sets.
- **Add to Selection List** - This option is available for bibliographic record sets.

Link to other records from the Find Tool results list

You can link from a record listed in the Find Tool results to other related records. For example, you can link from a bibliographic record listed in the results to its linked item record or records. Follow these steps to link to other records from the Find Tool results list.

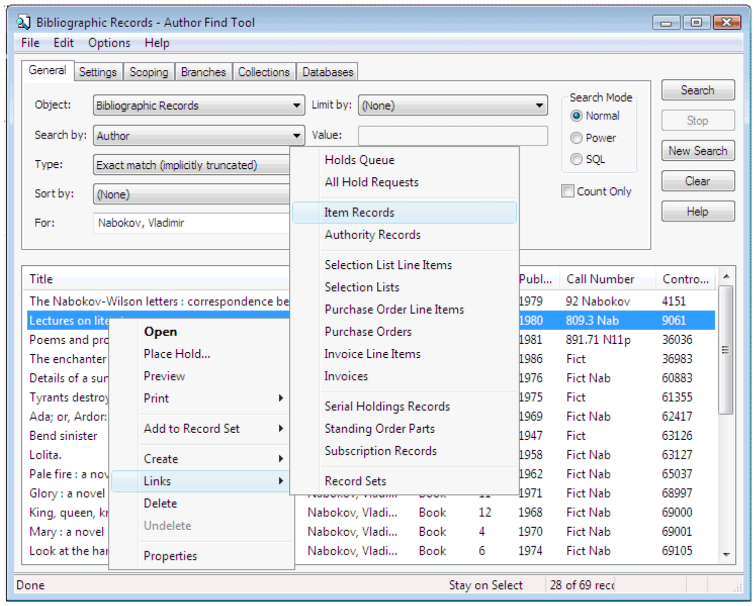
1. Search for a record.

   The records that meet the criteria you specified appear in the Find Tool results list.

2. Right-click the record from which you want to link to other related records, and select **Links**.

   The types of records to which this record could be linked are listed.

Tip:
Press the up or down arrow keys to locate the record, and press **SHIFT+F10** to open the context menu. Use the arrow keys to navigate through the context menu options, and press **ENTER** to select an option. For more keyboard shortcuts, see "Basic Shortcut Keys" on page 148.



Tip:
You can sort the list of linked records by clicking on the headers in the dialog box. If you print the list, it will be printed in the order in which you sorted it.

3. Select the type of record.

   If only one record of the selected type is linked, it opens in the appropriate workform. If multiple records are linked to the selected record in the Find Tool results list, they appear in a Linked Records dialog box. You can right-click on the linked records and perform certain actions from the context menu.

Send search results to a record set

Sending search results to a record set is useful if there is some action you want to take on the records. For example, you could search for bibliographic records that do not display in the PAC, send the search results to a record set, and then bulk change the **Display in PAC** setting for all the records at once. For more information on the types of records that support record sets, see “Creating and Deleting Records” on page 80.

Tips:
If your search is likely to return more records than the number in the **Retrieval Limit** box on the Settings tab, you may want to select **Count only** or increase the retrieval limit. When you select **Count only**, the retrieval limit is ignored, and it counts all the records. A warning message appears if the record set that will be created exceeds the limits set in Polaris Administration.

Follow these steps to put search results into a record set.

1. Enter the search criteria for the record on the Find Tool-General tabbed page.
2. If you want the records to be sent to the record set without displaying them, select **Count only**.
3. Select the **Settings** tab.

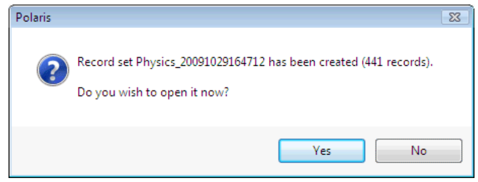
   The Settings tabbed page appears.
4. Select **Send Results to a New Record Set**.
5. Type a name for the record set in the **Name** box.
6. Select the record set owner in the **Owner** box.

7. If you want to change the number of records that can be added to a record set before a warning message appears, type a different number in the **Warning Size Threshold** box. For example, if you want a warning message to appear only when five thousand or more records are about to be added to the record set, type **5000**.

Tip:
The default threshold is set in Polaris Administration using the Staff Client profile **Find Tool/ record-set-to-record-set creation: Record set size warning threshold**. It applies to record sets created from the Find Tool and record sets created from other record sets. See “Set Find Tool defaults” in the *Polaris Administration Guide 4.1R2*.

8. Click **Search.**

A message box asks if you want to open the record set.



9. Select **Yes** to open the record set in the record set workform, or **No** to return to the Find Tool results list. You can search for the record set and open it later.

Related Information

For information on other methods for creating record sets, adding records to existing record sets, and using record sets, see “Creating and Using Record Sets” on page 88.

Doing a Basic Search

The Find Tool appears when you select a subsystem and record type from the Polaris Shortcut Bar, or when you click **Find** on workforms and dialog boxes. You can also press **F12** from anywhere in the Polaris staff client application to open the Find Tool and search for bibliographic records, or **Ctrl+Alt+F9** to search for item records.

When the Find Tool opens, select the type of record to search for (object), the access point to search by, and the type of search. Then type the word or phrase to use for the search. In addition, you can use various options on the Find Tool to narrow your search results, specify how to sort the results, or get a simple count of the number of records.

Depending on the type of record, you can display the records in the Find Tool results list and add them to a record set, or select **Count only** and add them all to a record set without having to display them in a list. If you want to add specific records to a record set, you can display them in the results list, right-click the selected records, and select **Add to Record Set** from the context menu.

If you usually search for records using the same criteria, you can save the search options as your user default. For example, if you usually search for bibliographic records by title and limit the search by material type, you can set this up as your default. You can also specify sorting options as part of your user default. Each time you search for bibliographic records, the options are set automatically. For more information, see "Customize the Find Tool by user" on page 38.

You can have multiple Find Tools open at once. The title bar of each Find Tool displays the object and access point selected for that search. For example, if you are searching for an item record by barcode, the title bar displays **Item Records - Barcode Find Tool**.

Important:
Your Polaris administrator may set the Find Tool so that search results are filtered according to your staff member permissions and those of the workstation you are using. In Polaris Administration, if the Staff Client profile **Find Tool: Filter search results by permission** is set to **Ye**s, you will see only the records for which you have **Access** permission. If it is set to **No**, you can see records in the search results even if you do not have permission to access (open) them.

See the following topics:

- "Setting Up a Search" on page 46
- "Search for a record" on page 50

Setting Up a Search

A search query is a structured request for database information. The simplest query uses default settings, and you simply type a word or phrase to describe the records. This word or phrase might be, for example, a full or partial title, the last name of an author, a patron's name, or a purchase order number.

A standard search query on the Find Tool requires the following four criteria:

- Record (**Object**)
- Access point (**Search by**)
- Type of search (**Type**)
- Search string (**For**)

You can also narrow your search by selecting an option in the **Limit by** box, and then a value in the **Value** box. To sort the results before they are returned, select an option in the **Sort by** box. The options in the **Limit by** and **Sort by** boxes depend on the type of record you selected in the **Object** box.

Record (Object)

The record types that you can select in the **Object** box depend on the menu option, workform, or field where you accessed the Find Tool. For example, in a Purchase Order workform, if you click **Find** in the Supplier field, the Find Tool opens with **Supplier** in the **Object** box. When you open the Find Tool from the **Funds** field, **Fund** is selected in the **Object** box.

Access Point (Search by)

You select the access point in the **Search by** box. The list of access points depends on the record type you selected in the **Object** box. For example, access points for bibliographic records include **Title**, **Author**, and **Subject** (among others). You can set your own default **Search by** access point for each record type. Then, whenever you log on with your user ID and search for a record using the Find Tool, the **Search by** option is automatically set for the record type. See "Customize the Find Tool by user" on page 38. You can set the option back to the system default at any time.

Search Type

The available search types depend on your selections in the **Object** box and the **Search by** box.

Tip:
When you do a title search, Polaris checks fields in the bibliographic record indexed for title searching, such as the 245, 246, 440, and 740 tags.

- **Exact match (implicitly truncated)** - Displays all the records beginning with the letters or numbers in the **For** box. No asterisk is needed after the term in this type of search. However, you may want to enter an asterisk before the search term. See "Using Wildcard Characters in Searches" on page 49.

  Example:
  Type **energy** in the **For** box for a bibliographic title search. The results list includes all titles that begin with *energy*.

- **Exact match (explicitly truncated)** - Displays only the records that exactly match the letters or numbers in the **For** box. If you use an asterisk, the Results list displays the same records as those of an implicitly truncated search.

  Example:
  Type **energy** in the **For** box for a bibliographic title search. The results list includes only items titled *energy*.
  If you type **energy***, the results are the same as for an implicit search of *energy*.

- **Browse** - Display the specified index headings, beginning with entries that start with text similar to the text in the **For** box. For example, a browse title search for *trains* displays the portion of the title index containing the first title that starts with *trains*. Browse searching is Unicode-compliant, so you can enter diacritics or special characters and the headings display that begin with the characters. See "Doing a Browse Search" on page 53.
- **Keyword search** - Finds records that include the exact search term or terms you input, in any order. There is an implied *and* between multiple words. For example, a keyword title search for *trains* displays a list of items that have the word *trains* anywhere in the title. See "Doing a Keyword Search" on page 56.
- **Phrase search** - A special kind of keyword search for multiple words in the exact order in which you entered them. See "Doing a Phrase Search" on page 60.

Sort By

Tip:
The **Sort by** option is not available for browse searching.

If you want search results to display in a specific order, you can select an option in the **Sort by** box. The sort option can be part of your user default settings when you are searching for a specific type of record. For information on setting a user default search, see "Customize the Find Tool by user" on page 38.

The available options in the **Sort by** box depend on the record. For example, if you are searching for a bibliographic record, you can select from the following sort options:

- **Author**
- **Author, the Publication Date**
- **Author, then Title**
- **Call Number**
- **Call Number, then Author**
- **Call Number, then Publication Date**
- **Call Number, then Title**
- **Control Number**
- **Most Popular**
- **Publication Date**
- **Publication Date, then Author**
- **Publication Date, then Relevance**
- **Publication Date, then Title**
- **Relevance**
- **Title**
- **Title, then Author**
- **Title, then Author, then Type of Material**
- **Title, then Publication Date**
- **Title, then Type of Material**
- **Type of Material**

Search String (For)

You specify the search string in the **For** box by typing one or more characters. Polaris ignores letter case, multiple spaces, and all punctuation (except quotation marks) entered in the **For** box. The search does consider special characters and diacritics. Consider the following when entering text in the **For** box:

- **Initial articles** - If the **Use Initial Articles Table** check box is checked on the Settings tab, the initial article in a title is ignored or "stripped out" if that article is defined in the Initial Articles table in Polaris Administration (see "Defining Leading Articles" in the *Polaris Administration Guide 4.1R2*).

  Example:
  Searching for *The Great Gatsby* yields the same results as searching for *Great Gatsby*.

The check box is used when the search type is **Exact match** (either implicitly or explicitly truncated), and you are searching for the following records:

Tip:
The **Use Initial Articles** check box is inactive for all other searches.

Authority Records (Heading, Tracing/Reference)
Bibliographic Records (Title and Series)
Check In Records (Title)
Claims (Title) (both for Acquisitions and Serial versions)
Course Reserve Records (Title)
Hold Requests (Title)
ILL Requests (Title)
Invoice Line Items (Title)
Issue Records (Title)
Item Records (Title and Series)
Part Records (Title)
Purchase Order Line Items (Title)
Reserve Item Records (Title)
Route Lists (Title)
Selection List Line Items (Title)
Serial Holdings Records (Title)
Subscription Records (Title)

- **Reusing a search string** - All the search strings you type in the **For** box are retained during a Polaris session. To use a search string for another search, select the string in the **For** box.
- **Using an implicitly truncated search** - A title search for “bulletin” could be done using the following string: **bulle**.

Note:
If you can use an ampersand (&) in a search string for phrase and keyword searching, it is equivalent to the word **and**. The ampersand and the word **and** are not interchangeable for exact match or browse searching.

Using Wildcard Characters in Searches

Wildcard characters are the special characters asterisk ***** or question mark **?**, which you can use in a search to represent the rest of the word in keyword and exact match - implicitly truncated searches. A wildcard character is not necessary after the search term in an exact match - implicitly truncated search because the truncation is implied. However, you may want to enter an asterisk before your search term if you are not sure if something comes before the search term.

Examples:
Keyword searching - The entry **King*** for a keyword author search yields results such as *King*, *Kingsley*, and *Kingford*. The entry *King* for a keyword author search yields results such as *Talking Heads*, *Dykinga*, and *Polkinghorne*.

Exact match (implicitly truncated) -The entry **material** for a selection list line item notes search gets no search results. However ***material** finds the selection list line item that has the note: **This is printed music, but the material type is set to 28 Youth**. The search finds the results because it looks for **material** anywhere in the note.

Limit By

Tip:
The **Limit by** option is not available in Browse searches.

You can limit your search to narrow the results. For example, you can search for a title and limit the format to **DVD**. Some **Limit by** options have pre-set selections in the **Value** box. For example, if you select **Language**, a list of languages appears in the **Value** box. But, if you select **Author**, you type the author's name in the **Value** box. You must be precise when you enter free text in the **Value** box because there is no implicit truncation. When you enter only a part of the value you want to limit by, you must also enter an asterisk.

Example:
If you are searching for item records by title, and you limit by **Current borrower**, type the patron's name in the **Value** box in these formats:

last name*

last name, first name*

last name, first name middle name

You must include the comma and the wildcard character as shown. The last name alone will not work in the **Value** box.

The specific languages listed in the **Value** box are set in the **MARC Language Scoping Display** policy table. This list is used if the Staff Client profile **Find tool: Use language scoping display** is set to **Yes** in Polaris Administration. See "Setting Language Display" in the *Polaris Administration Guide 4.1R2*.

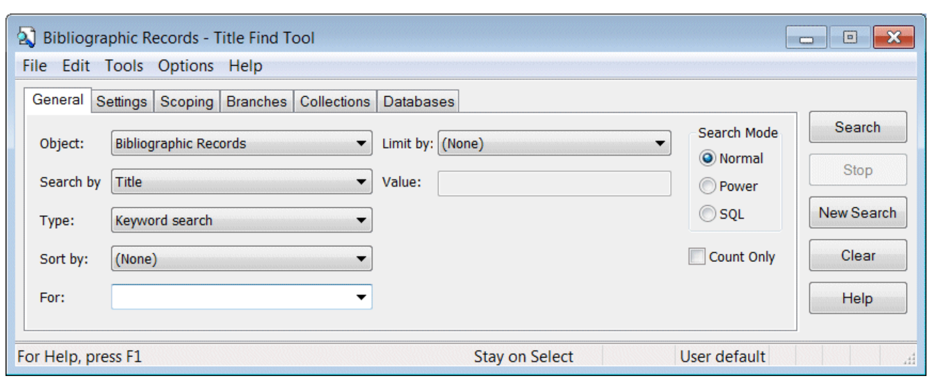
Search for a record

1-2-3

Follow these steps to do a simple search for records.

1. Open the Find Tool using one of these methods:
   - Select a menu option from the Polaris Shortcut Bar.
   - Click **Find** on a workform.
   - If you are searching for a bibliographic record, press **F12**.

   The General tabbed page of the Find Tool appears.



2. If the object selected is not what you wanted to search for, select the record type to search for in the **Object** box.

3. Select the access point to search by in the **Search by** box.

   Note:
   If you select a date option in the **Search by** box (for example, you are searching for serial issues and select **Expected arrival date**), the Find Tool displays date range boxes where you select the beginning and ending dates from a calendar.

4. Select the type of search in the **Type** box.

5. If you want to sort the results before they appear in the list, select an option in the **Sort by** box.

6. Type a search string in the **For** box.

   If you have entered a search string but decide to search for a different object, you can switch the object while retaining the same search string.

   Example:
   You search for bibliographic records by author and then you want to search for item records with the same author. You can select **Item Records** in the **Object** box and the author's name remains in the **For** box.

7. If you want to narrow your search, select an option in the **Limit by** box, and select or type a value in the **Value** box.

   Note:
   The **Value** box lists options for some **Limit by** settings, while other settings require a text entry in the **Value** box. For example, if you select **Language** in the **Limit by** box, the **Value** box contains a list of languages. If you select **Author** in the **Limit by** box, you type the author's name in the **Value** box. If you enter a portion of a Limit by value, you must enter an asterisk. For example, select **Author** in the **Limit by** box and enter **Kin*** in the **Value** box to display works by authors named *King*, *Kings*, *Kingsley*, and others. See "Limit By" on page 50.

8. Click **Search** or press **ENTER**. If you want to cancel the search, click **Stop** or start a new search with a different query.

   The results list appears in the Find Tool window.

   Important:
   If you see the message **Could not connect to the Z3950 search engine**, try increasing the search timeout limit. Select the **Settings** tab, and type a larger number in the **Search Timeout (sec.)** box. For example, if the timeout is set to 30 seconds, increase it to 60 seconds. The search process continues for 60 seconds, if necessary.

9. To work with a record in the results list, do one of the following actions:
   - Double-click a line item to open the record in a workform (see "Using Polaris Workforms" on page 13).
   - Right-click a line item, and select an option from the context menu. The specific context menu options depend on the selected record type. See "Use the context menu in the Find Tool results list" on page 41.

Tip:
To quickly locate an item in a list box, type the first letter. For example, to search by genre, open the **Search by** list and press **G**.

Tip:
If you have an access point selected and a search type, but then decide to change the access point, the search type is retained. For example, if the search type is **Keyword** and the access point is **Author**, you can switch the access point to **Title** and the search type will be retained because both access points can be used with keyword searching.

Tip:
The results list automatically clears when you start another search. You can also click **New Search** to close the results list, return the Find Tool to its default settings, and clear the **For** box.

Tip:
Check the status line to see if all results are displayed. If not, you can press **CTRL+SHIFT+A** to return all results.
To sort the list after the results appear, you can click on the column headers.

Related Information

- "Doing a Browse Search" on page 53
- "Customize the Find Tool by user" on page 38
- "Using Find Tool Results Lists" on page 41
- "Doing a Browse Search" on page 53
- "Doing a Keyword Search" on page 56
- "Doing a Phrase Search" on page 60
- "Doing Power Searches" on page 61
- "Setting Up SQL Searches" on page 67
- "Scoping Searches for Bibs and Items" on page 70

Doing a Browse Search

You can select **Browse** as a search type only when you are searching for bibliographic records by **Author**, **Call number**, **Series**, **Subject**, or **Title**. When you browse by author, series, or subject, the index opens to the authorized heading that begins with what you entered in the **For** box. You select the heading to display the titles associated with it. When you browse by title, the results list displays the portion of the alphabetical title index that begins with the text you typed. When you browse by call number, the portion of the catalog that begins with the call number is displayed. Browse searching includes Unicode support for searching by author, subject, series, and title. You can enter diacritics and other characters when browse searching.

Note:
The **Limit by**, **Count only**, **Sort by** and **Add to Record Set** options do not apply to browse searches.

See the following topics:

- "Browse by author, series, or subject" on page 53
- "Browse by call number or title" on page 55

Browse by author, series, or subject

Follow these steps to browse search for bibliographic records by author, series, or subject authorized headings.

Note:
You cannot browse by author, series, or subject when using the Find Tool from within a workform.

1. On the Find Tool, General tabbed page, select **Bibliographic Records** in the **Object** box.
2. Select **Author**, **Series**, or **Subject** in the **Search by** box.
3. Select **Browse** in the **Type** box.

Tip:
Type the name of the author using the format: *last name first name*. For example, type William Shakespeare as **Shakespeare William**.

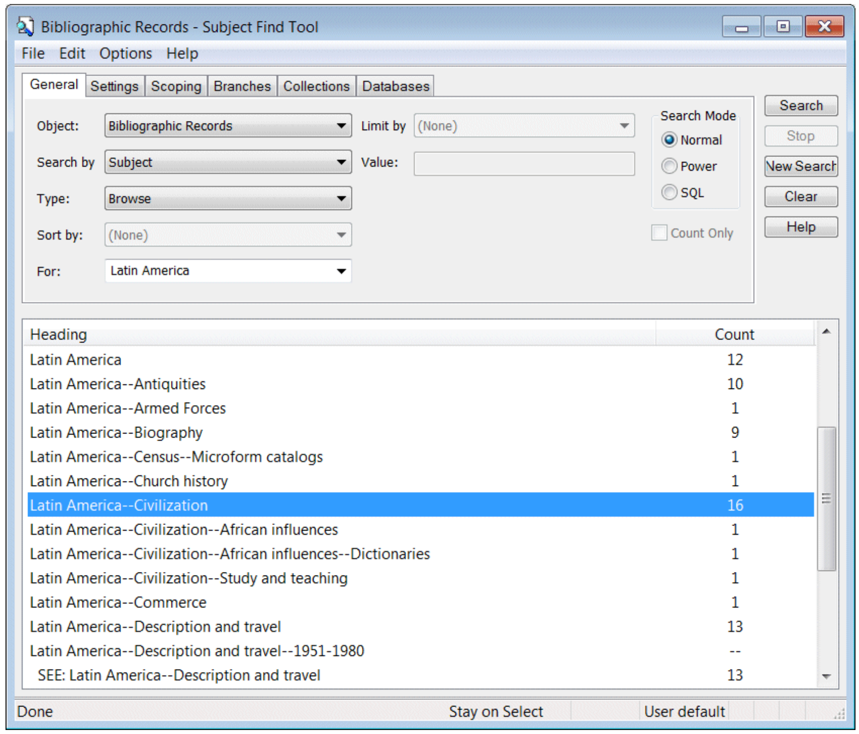
4. Type the name of the author, the series name, or the subject word in the **For** box.

   Note:
   You do not need to type the entire index heading.

5. Click **Search** to begin searching.

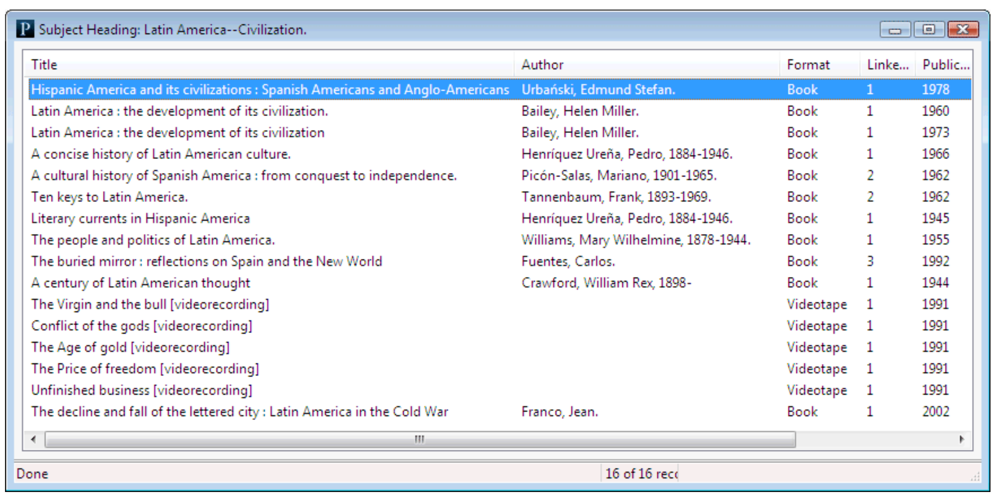
   Author, subject, or series headings appear in the results list. The numbers in the **Count** column specify how many records are associated with that heading.

   Note:
   You can select a *See* or *See Also* cross reference.



6. Double-click a heading.

   The Heading dialog box displays the titles associated with the heading.



7. If you want to open the record, double-click it in the list.

   The Bibliographic Record workform opens for the title you selected.

Browse by call number or title

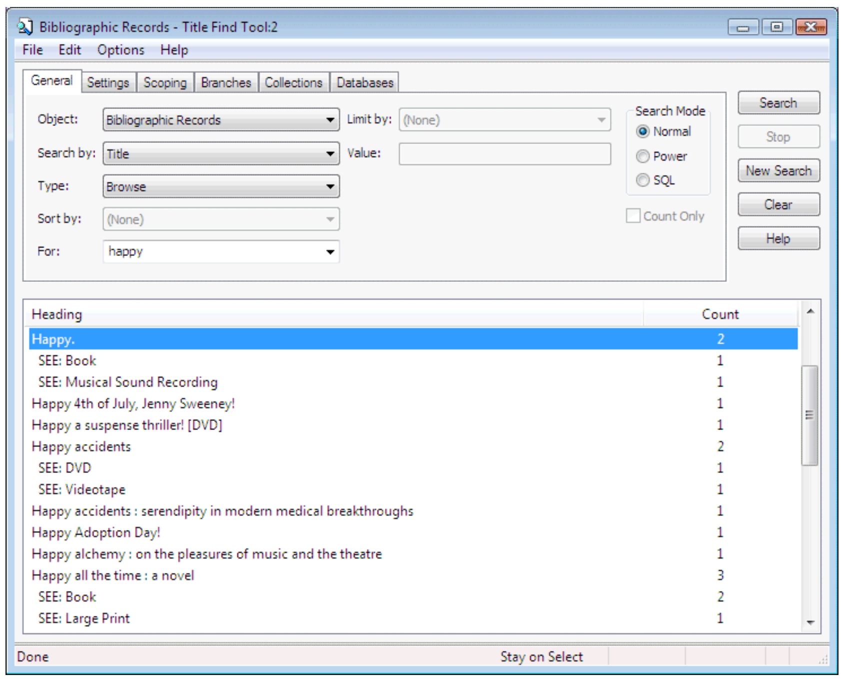
Follow these steps to browse search for bibliographic records by bib call number or title.

1. On the Find Tool, General tabbed page, select **Bibliographic Records** in the **Object** box.
2. Select **Call number** or **Title** in the **Search by** box.
3. Select **Browse** in the **Type** box.
4. Type the call number or title in the **For** box.

   Note:
   You do not need to type the entire title or call number.

5. Click **Search**.

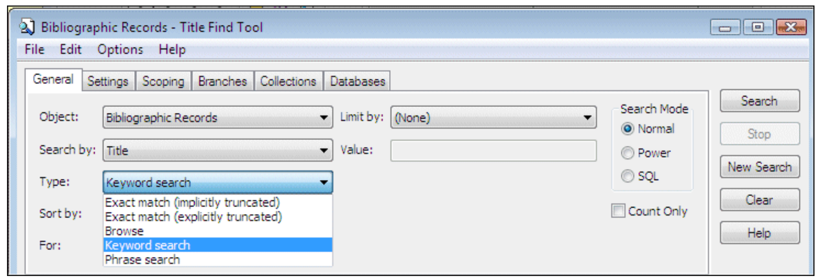
   The results list displays the portion of the title or call number index that begins with your search text.



6. Right-click a title line item, and select **Open** from the context menu to display the record in the Bibliographic Record workform.

Doing a Keyword Search

When you select a record type in the **Object** box and an access point in the **Search by** box, **Keyword search** appears in the **Type** list if available for this combination of record type and access point.



For some types of records, keyword searching is available because the selected **Search by** access point actually searches in linked records. For example, when you search by **Title** for a line item in a selection list, purchase order, or invoice, **Keyword search** appears in the **Type** box because the system searches for the line item by the title in the linked bibliographic record.

Keyword searching is available for the following types of records (depending on the selection in the **Search by** box):

Acquisitions	**Cataloging**	**Patron Services/Circulation**	**Serials**
Claims	Bibliographic	Patron records	Claims
Selection list line items	Authority	Course reserves	Issues
Purchase order line items	Items	Hold requests	Parts
Invoice line items	Course reserves	ILL	Route lists
	Reserve items		Subscriptions
	Community		
	Promotions		

See the following topics:

- "Automatic Suggestions in Keyword or Phrase Searching" on page 57
- "Search by keyword" on page 59

Automatic Suggestions in Keyword or Phrase Searching

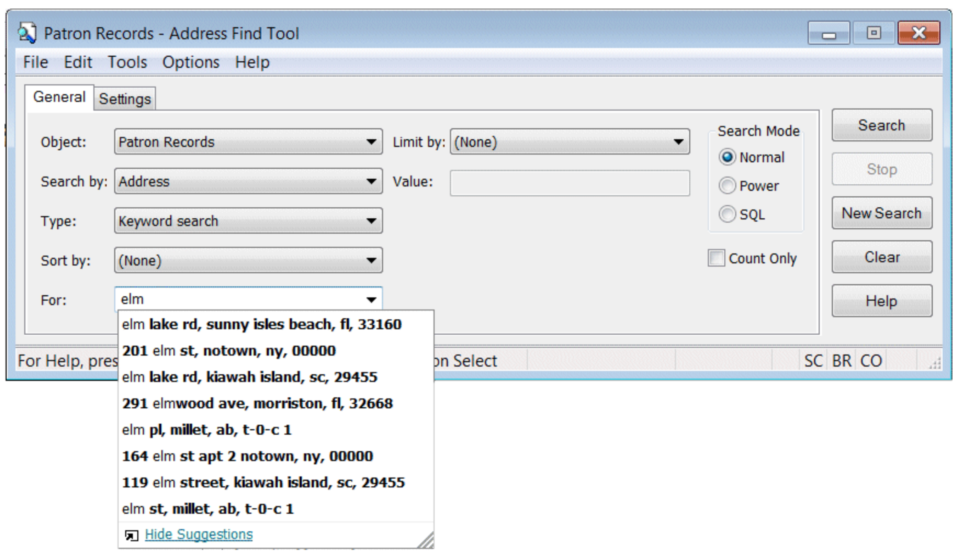
If your library system has the Cataloging parameter **Auto-suggest feature enabled** set to **Yes**, a list of suggestions appears as you type if you are doing a keyword or phrase search for a record by access point that is keyword-indexed. Automatic suggestions do not appear if you are searching a remote database. See “Managing Auto-Search Suggestions” in the *Polaris Cataloging Guide 4.1R2*.

Note:
You can turn automatic suggestions off by selecting **Hide Suggestions** at the bottom of the list of suggestions. To turn them back on, click in the **For** box.

Automatic suggestions for patron records

When you do a keyword or phrase search for a patron record using any of the following access points, a list of suggestions appears automatically as you type:

- **Phone Number**
- **Address (StreetOne, StreetTwo)**
- **City, State PostalCode-ZipPlusFour)**
- **Email Address**
- **Name (First, Middle Last)**
- **Name (Last, First Middle)**

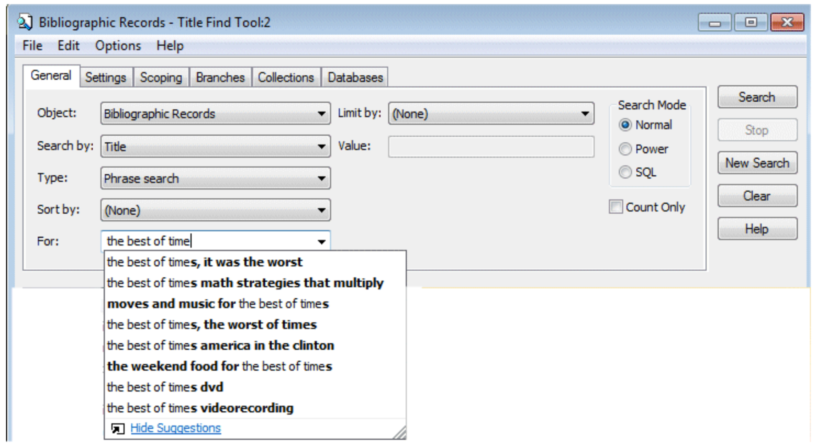


Automatic suggestions for bibliographic or item records

When you do a keyword or phrase search for a bibliographic record or item record using any of the following access points, a list of suggestions appears automatically as you type:

- **Author**
- **General notes**
- **Genre**
- **Publisher**

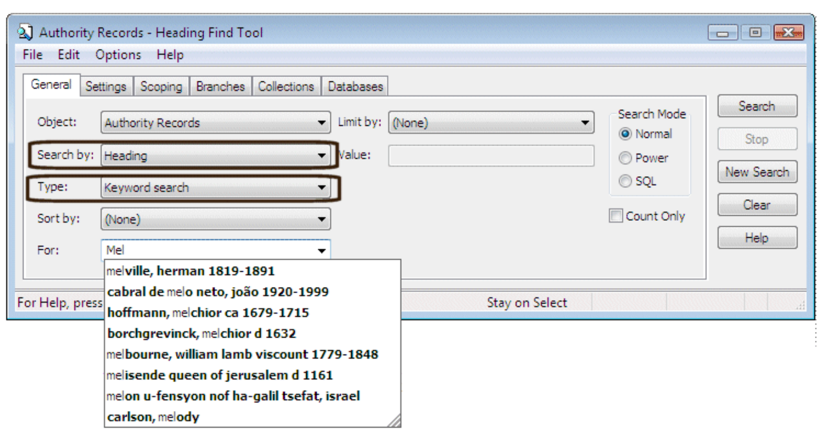
- **Subject**
- **Title**



Automatic suggestions for authority records

When you do a keyword or phrase search for an authority record using any of the following access points, a list of suggestions appears automatically as you type:

- **Heading**
- **All keyword fields**
- **Conference name**
- **Corporate name**
- **Genre/Form subject**
- **Geographic name**
- **LC children's subject**
- **LC subject**
- **Name**
- **Personal name**
- **Subdivision heading**
- **Topic term**
- **Tracing/Reference**



Search by keyword

Follow these steps to find records using keyword searching.

1. On the Find Tool, General tabbed page, select the record type that uses keyword searching in the **Object** box.
2. Select an access point for which you can use keyword searching in the **Search by** box:
3. Select **Keyword search** in the **Type** box.
4. Type one or more keywords, in any order, in the **For** box.

   Note:
   Automatic suggestions may appear as you type. See "Automatic Suggestions in Keyword or Phrase Searching" on page 57.

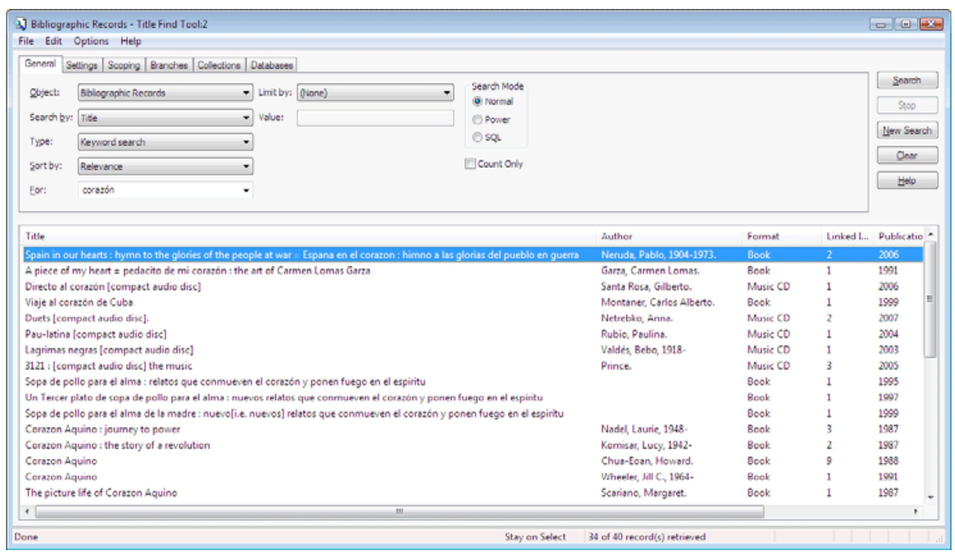
5. If automatic suggestions appear, and one is the search term you want to use, select it.

   The results appear as soon as you select an automatic suggestion.

6. If no automatic suggestions appear, or they are not useful, click **Search** to begin searching.

   Titles appear in the results list.

Tip:
You can type part of a word and use a wildcard character. For example, if you type **King*** for a keyword author search, then the results list includes works by authors named *King*, *Kings*, *Kingsley*, and others. You can also use wildcards in the beginning of a word to indicate that something may come before it. See "Using Wildcard Characters in Searches" on page 49.



Doing a Phrase Search

You can do a phrase search for bibliographic and item records. When you select **Phrase** in the **Type** box and type a phrase in the **For** box, the search looks in all indexed fields for that phrase in the same word order. You can also narrow the search to look for the phrase in specific fields. Phrase searching is not available for all access points. For example, if you are searching for a bibliographic record and select **Call number** in the **Search by** box, phrase searching is not available in the **Type** box.

See the following topic:

"Search by phrase" on page 60

Search by phrase

Tip:
You can use wildcards in the beginning, middle, or end of phrase search strings to indicate that other words come before, in the middle, or at the end of the search string.

Follow these steps to find records containing multiple words, in the exact order you typed them.

1. On the Find Tool, General tabbed page, select **Bibliographic Records** or **Item Records** in the **Object** box.
2. Select one of the following access points in the **Search by** box:
   - **All Keyword Indexed Fields** searches all the indexed fields.
   - **Author** searches the author fields.
   - **General notes** searches notes fields.
   - **Genre** searches the genre fields.
   - **Series** searches the series fields.
   - **Subject** searches the subject fields.
   - **Title** searches the title fields.
3. Select **Phrase** in the **Type** box.
4. Type the phrase in the **For** box.

   Note:
   A list of suggestions may appear as you type. See "Automatic Suggestions in Keyword or Phrase Searching" on page 57
5. If automatic suggestions appear, and one of the suggestions is the phrase you want to search by, select it.

   The results appear as soon as you select an automatic suggestion.
6. If no automatic suggestions appear, or they are not useful, continue typing the entire phrase, and click **Search**.

   Titles appear in the results list.

Doing Power Searches

With power searching, you can construct complex, precise searches by writing Common Command Language (CCL) queries. Power searching is a good way to list records that share a combination of very specific characteristics. To construct a power search, you can begin with a basic search expression and then add more search expressions to it, or you can write the entire query.

Note:
You can do complex searches for cataloging records and have Polaris format the information you provide into CCL for you. See "Scoping Searches for Bibs and Items" on page 70.

See the following topics:

Setting Up CCL Queries

CCL queries in the Find Tool consist of one or more search expressions. Each search expression is a search string and a series of symbols and operators specifying the desired search results.

Tip:
You can change the time out for the search from the default of 30 seconds to another length of time by typing TIMEOUT=(number). For example, if you want search for United States and increase the time out to 60 seconds, type:
KW=United States and TIMEOUT=60

A search expression includes the following components:

- **Access point** - A search field identifier, such as author or title. Also known as a qualifier.
- **Operator** - The logical link between an access point and a search string, or between search expressions.
- **Search string** - A string of characters identifying the item for which you are searching. Also known as an item description, search term, or value.

Example:
The following query, composed of two search expressions linked by *AND*, finds the works of author Asimov published in or after 1970:

AU=asimov AND PD >= 1970

where

AU and *PD* are access points (Author and Publication Date)
=, *AND*, >= are operators
asimov and *1970* are search strings

You can group search expressions with parentheses to direct the order of operations.

Mnemonic Codes for Access Points

When you are creating queries, you must use the mnemonic code, and not the full term, for the following access points:

Note:
Branches and collections are available only with normal searches.

- Find Tool **Search by** options
- Language (LA)
- Target audience (TA)
- Collection (COL) - Click the **Collections** tab on the Find Tool to see the abbreviations for your system.
- Assigned Branch (AB) - Click the **Branches** tab on the Find Tool to see the abbreviations for your system.

CCL Operators

The following are CCL operators:

- **Boolean (logical) operators** - AND, OR, NOT logically connect items
- **Proximity (nearness) operators** - Specify the location of and distance between items
- **Relational operators** - Specify comparative relationships between items, such as greater than, less than, or equal to

Boolean Operators

The Boolean operators AND, OR, and NOT combine search expressions in logical sequences:

- AND - A record must match both the search expression before and the expression after the operator to be included in the search results.

  Example:
  AU=isaac asimov AND TI=planets

  Finds only the items written by Isaac Asimov that have the word *planets* in the title.

- OR - A record must match either the search expression before or the expression after the operator, or both, to be included in the search results.

  Example:
  AU=isaac asimov OR TI=planets

  Finds all items written by Isaac Asimov and all items with the word *planets* in the title by any author.

- NOT - A record must match the search expression before the operator, but not the expression after the operator to be included in the search results. The expression after the operator must be enclosed in parentheses.

  Example:
  AU=isaac asimov NOT (TI=planets)

  Finds only those items written by Isaac Asimov that do not have the word *planets* in the title.

You may build a more complex query using the Boolean operators. When using multiple operators in the same query, use parentheses to group the search expressions so that they are done in the correct order, from left to right.

Proximity Operators

The proximity operators **N**, **Nn**, **W**, and **Wn** specify the relative position of search terms in the search results. Proximity operators are used with a number representing the distance between the two terms (the proximity distance). Adjacent terms have a proximity distance equal to 1, and the default proximity relation is **LE** (less than or equal to).

If the proximity operator begins with **N**, it indicates the search terms may be separated by the specified number of words in any order. For example, a power search for **KW=United States N2:EQ KW=Union** searches for records where the phrase **United States** appears exactly two words before or after the keyword **Union**.

If the proximity operator begins with **W**, it indicates the search terms must be within the specified number of words in the specified order. For example, a power search for **KW=Harry Potter W10:LT KW=J.K. Rowling** searches for records where the phrase **Harry Potter** appears less than 10 words before the phrase **J.K. Rowling**.

- N or % - Indicates the search terms should be next to each other in any order.

  Examples:
  AU=james N joyce
  AU=james % joyce

  Finds any items with authors that have the names *James* and *Joyce* next to each other, such as *James Joyce* or *Joyce James*.

- N*n* - Indicates the search terms may be separated by the specified number of words (*n*) in any order, where *n* is a number between 1 and 9.

  Example:
  AU=james N4 joyce

  Finds any items with authors that have the names *James* within four words of the name *Joyce*, such as *James C. Joyce* or *Joyce and Roberta James*.

- W or ! - The search terms must be next to each other in the specified order.

  Examples:
  AU=james W joyce
  AU=james ! joyce

  Finds any items written by James Joyce, but ignores items written by Joyce James.

- W*n* - The search terms must be within the specified number of words (*n*) in the specified order, where *n* is a number between one and nine.

  Examples:
  AU=james W4 joyce
  AU=james !4 joyce

  Finds any items written by James C. Joyce and James Robert Collins Joyce, but ignores items written by Joyce C. James.

Relative Operators

The relative operators include the following mnemonic codes for comparing items:

Operation	*Mnemonic Code/Relative Operator*
Equal to specified item	EQ or =
Not equal to specified item	NE or <>
Less than specified item	LT or <
Less than or equal to specified item	LE or <=
Greater than specified item	GT or >
Greater than or equal to specified item	GE or >=
Equal to specified item	EQ or =

Examples:
- The following example finds items published in or after 1987:
PD GE 1987
- The following example finds items published before 1932 that have the words *solar system* in any indexed field:
KW=solar system AND PD < 1932

Wildcard Characters

You can use the following special characters to search for character pattern matches to the item description:

Tip:
Enter as much of the base search term as you can because the shorter the base, the more imprecise the search. For example, entering **bee*** can yield search results of **bees**, **beer**, or **Beecher**.

- **Question mark (?)** - Indicates 0 or more characters. For example, type **child?** to find *child*, *children*, *child's*, and so forth.
- **Asterisk (*)** - Functions like the question mark, indicating zero or more characters. For example, type **west*** to find *west*, *western*, *West's*, and so forth.

Quotation Marks in Power Searching

Tip:
You can enclose any search string in quotation marks. If you are not sure whether to enclose the search string in quotation marks, you can always safely use them.

Strings containing the following words and characters must be enclosed in quotation marks if they are used as part of an item description in a CCL search:

N	?
N[1-9]	#
%	=
W	<>
W[1-9]	eq
!	gt
and	lt
or	ge
not	le
*	-
&	

Examples:
- To find the title *Bud, Not Buddy*, you type the following command:
TI = "bud not buddy"
The string must be enclosed in quotation marks because in a CCL command, **not** is ordinarily a Boolean operator.

- To find the telephone number *453-7890*, you type the following command:
PHONE = "453-7890"
The string must be enclosed in quotation marks because in a CCL command, the hyphen (**-**) ordinarily separates two values, indicating a range of values between the two.

Power-Searching for Multiple ISBNs

Tip:
If you are pasting the ISBNs from another source (such as a Word document) that uses the curved "smart quote" characters, change the quotation marks to straight quotes in the search command.

The internal limit to the number of search terms you can enter with no parentheses is 10. If you search for multiple ISBNs, you can avoid this limit by placing each ISBN in quotation marks. The example shows the syntax you can use:

Example:
Each number represents an ISBN.
ISBN={"1", "2", "3", "4"}

Do a power search

Follow these steps to do a complex, precise search by writing a query in Common Command Language (CCL).

Note:
Search expressions are not case-sensitive. That is, you can use uppercase letters, lowercase letters, or a combination of both. They do not affect the results.

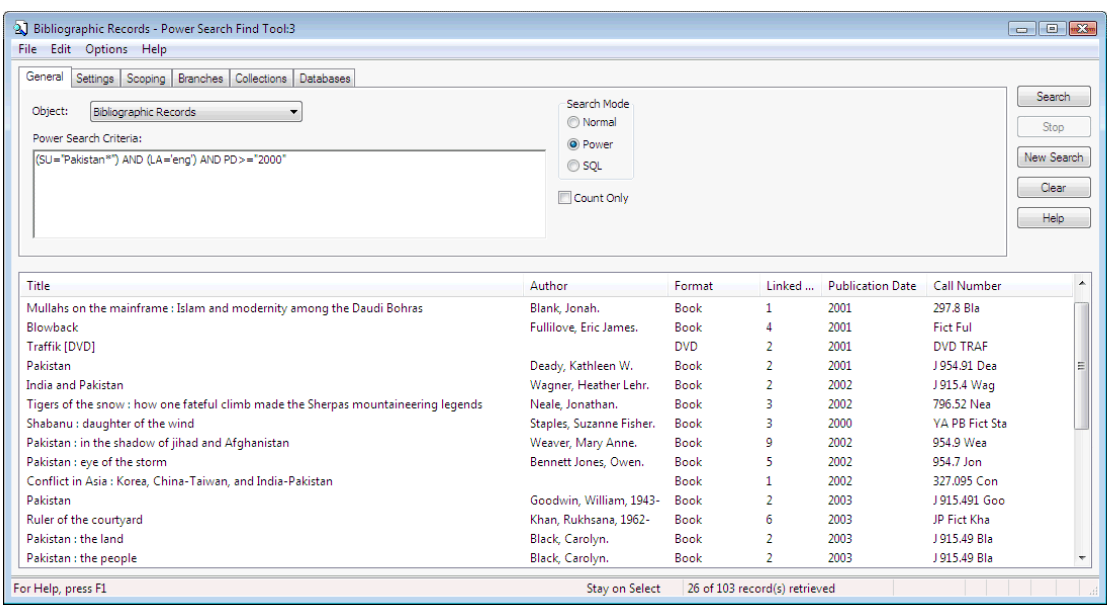
Tip:
To delete all the information in the **Power Search Criteria** box, click **Clear**. To start a new search with a basic search expression, click **New Search**.

1. To create a basic query first, select a record type in the **Object** box and enter the search criteria in the **Search by**, **Type**, and **For** boxes on the Find Tool - General tabbed page. See "Doing a Basic Search" on page 45.
2. Click **Power**.

   The General page displays a **Power Search Criteria** box. If you created a query in the previous step, the query appears in the **Power Search Criteria** box.

   Important:
   You must write your power search queries precisely. This means you may need to edit search expressions that are carried over to the **Power Search Criteria** box. For example, to find the works of all authors with names beginning with *Shake*, type **AU=shake*** in the **Power Search Criteria** box. If you type **AU=shake**, only the works of authors named *Shake* are found.
3. Input additional criteria or edit existing criteria in the **Power Search Criteria** box, using CCL syntax.
4. Click **Search** to begin searching.

   The results list appears.



Setting Up SQL Searches

You can do a search for records using Structured Query Language (SQL). SQL is a computer language used to create, modify, retrieve and manipulate data from relational database management systems, such as Polaris. In the Polaris Find Tool, SQL is used for data retrieval only. You cannot manipulate data in the Polaris database through SQL searching. To use all the options for SQL searching in the Find Tool, you must have permissions set in Polaris Administration. Separate permissions are required for accessing the SQL searching mode and saving search strings to the database. See "Special Permissions for SQL Searches in the Find Tool" in the *Polaris Administration Guide 4.1R2*.

In the Polaris Find Tool, the SQL query must use the following structure: **SELECT** *Column* **From** *Table* **Where** *Limit criteria*. The column name must match the column name in the database.

Tip:
Database table Help is available at www.polaristown.com.

Examples:
To find item records without an assigned collection, type:

SELECT ItemRecordID FROM CircItemRecords WHERE AssignedCollectionID IS NULL

To find item records with no statistical code, type:

SELECT ItemRecordID FROM CircItemRecords WHERE StatisticalCodeID IS NULL

To find item records with the circulation status of Lost, type:

SELECT ItemRecordID FROM CircItemRecords WHERE ItemStatusID = 7

To find item records that have a temporary shelf location, type:

SELECT ItemRecordID FROM ItemRecordDetails WHERE TemporaryShelfLocation IS not NULL

To find patron records where the registration expiration date is before or equal to October 31, 2009, type:

SELECT PatronID from PatronRegistration WHERE ExpirationDate <= '10/31/09'

Tip:
You can save text, even if it is not a legitimate SQL search, as a rough SQL template that users can use as a basis for searching. They can edit the search in the Search Criteria box without saving the changes to the template.

The **SELECT** command retrieves zero or more rows from one or more tables in a database. Commonly available keywords related to **SELECT** include:

- **FROM** - Indicates the tables from which the data is to be taken, as well as how the tables join to each other.
- **WHERE** - Identifies which rows to retrieve, or applied to **GROUP BY**.
- **GROUP BY** - Combines rows with related values into elements of a smaller set of rows.

- **HAVING** - Identifies which of the "combined rows" are to be retrieved. **HAVING** acts much like **WHERE**, but it operates on the results of the **GROUP BY** function.
- **ORDER BY** - Identifies which columns are used to sort the resulting data.

When the search results are displayed, you can print the results for a quick report. See "Print search results from the Find Tool" on page 25.

See the following topics:

- "Do a SQL search" on page 68
- "Search using a saved SQL search" on page 69

Do a SQL search

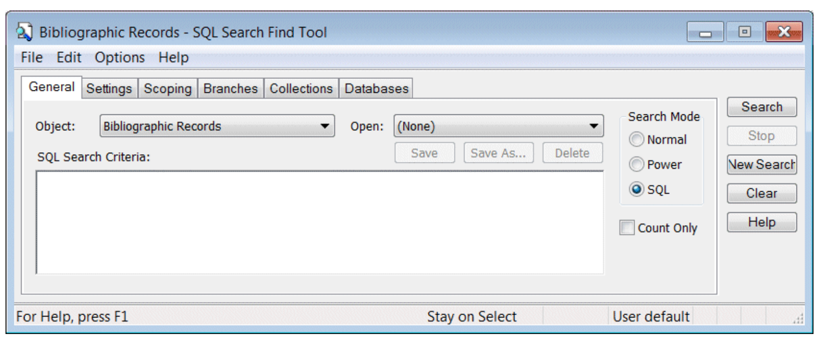
Follow these steps to search using SQL.

1. Select the type of record you want to search for in the **Object** box on the General tab of the Find Tool.
2. Select **SQL**.

   The SQL Search Criteria box appears.

   Note:
   To search using an existing SQL search, see "Search using a saved SQL search" on page 69.

Tip:
You can save the SQL search mode as the default search mode setting. See "Customize the Find Tool by user" on page 38.



3. Type the SQL search criteria and click **Search**.
4. If you want to save the SQL search criteria, click **Save,** type the name of the saved search in the Save SQL Search dialog box, and click **OK**.

   You can use this saved search when you search for the same type of record (object).
5. Click **Search**.

   The search results appear.

1-2-3

Search using a saved SQL search

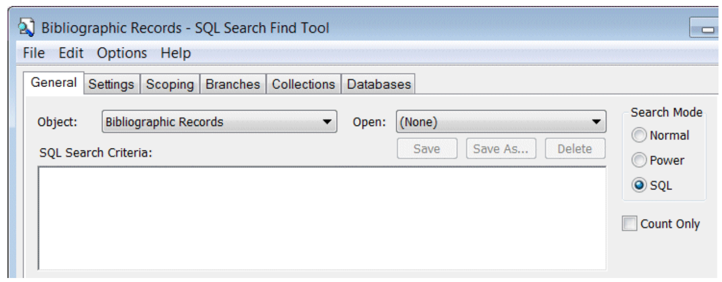
Follow these steps to use a saved SQL search.

1. Select the type of record you want to search for in the **Object** box on the General tab of the Find Tool.

Tip:
You can save the SQL search mode as the default search mode setting. See "Customize the Find Tool by user" on page 38.

2. Select **SQL**.

   The SQL Search Criteria box appears.



3. Select the saved search in the **Open** box.

   Note:
   The saved SQL searches listed in the **Open** box are those associated with the selected record (object).

   The saved SQL search appears in the Search Criteria box.

4. Click **Search**.

   Note:
   If you have permission, you can edit a saved search, and click **Save As...** to rename it. See "Special Permissions for SQL Searches in the Find Tool" in the *Polaris Administration Guide 4.1R2*.

Scoping Searches for Bibs and Items

Scoping is a method of further focusing your search beyond the basic search expression. Scoping, like power searching, allows you to conduct complex, precise searches with the Common Command Language (CCL). However, power searching requires you to know CCL and write your own queries. With scoping, you select the access points (qualifiers), operators, and search strings (values), and Polaris formats the information into CCL. You can use scoping with exact match, keyword, and phrase searches for bibliographic and item records.

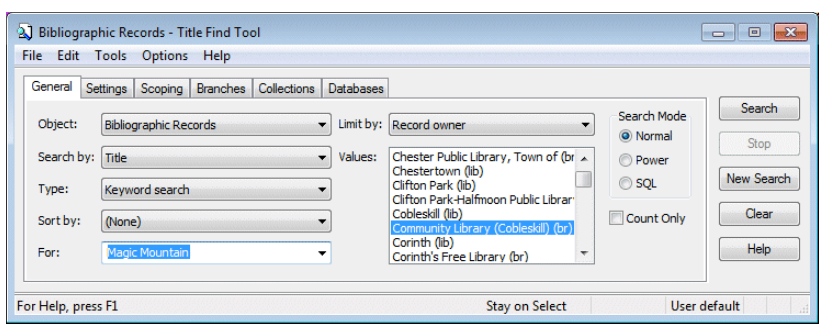
See the following topic:

- “Do a search with scoping” on page 70

Do a search with scoping

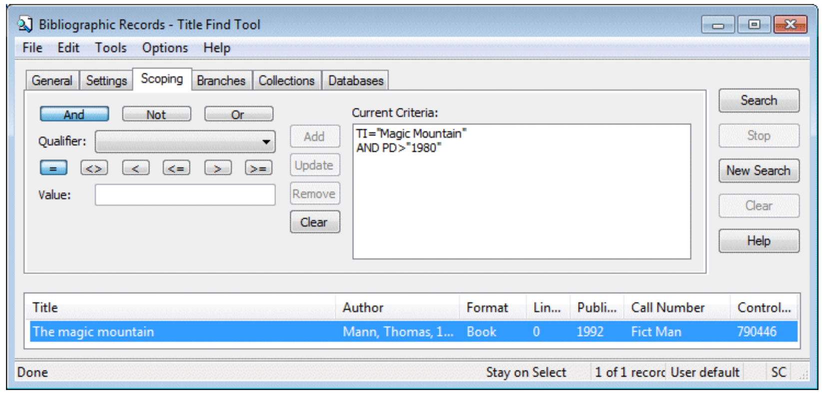
Follow these steps to do a complex, precise search by selecting access points, operators, and search strings. Polaris formats this information into the Common Command Language (CCL).

1. On the Find Tool - General tabbed page, fill in the **Object**, **Search by**, **Type**, and **For** boxes (see “Doing a Basic Search” on page 45).



2. Click the **Scoping** tab to display the Scoping tabbed page.

   The search expression you created on the General tabbed page appears in the **Current Criteria** box.



3. Choose one of the following Boolean operators (see page 62):
   - If the search results must match both search expressions, click **And**.
   - If the search results can match either search expression, click **Or**.
   - If the search results must match the first search expression, but not the second one, click **Not**.
4. Select an access point or modifier in the **Qualifier** box.
5. Choose one of the following relative operators:

Tip:
You can choose **[=]** or **[<>]** for all the qualifiers.
You can choose the following relative operators for the Publication date only: **[<]**, **[<=]**, **[>]**, or **[>=]**.

   - Click **[=]** for results equal to the value.
   - Click **[<>]** for results not equal to (excluding) the value.
   - Click **[<]** for publication dates less than the value.
   - Click **[<=]** for publication dates less than or equal to the value.
   - Click **[>]** for publication dates greater than the value.
   - Click **[>=]** for publication dates greater than or equal to the value.
6. Select or type a value for the query in the **Value** box. For additional information, see the following topics:
   - "Proximity Operators" on page 63
   - "Wildcard Characters" on page 65
   - "Quotation Marks in Power Searching" on page 65
7. Click **Add** to add the search expression to the **Current Criteria** box.

   If the search expression is longer than the width of the **Current Criteria** box, a horizontal scroll bar is displayed. The status bar displays **SC** to indicate scoping is in effect.
8. To add another search expression, do these steps:

Tip:
The original search expression, created on the General page, can be modified on the General page.

   a) In the **Current Criteria** box, select the expression which you want to *precede* the new expression.

   b) Select a Boolean operator, qualifier, relative operator, and value.

   c) Click **Add** to add the search expression to the **Current Criteria** box.

Tip:
To remove a search expression created on the Scoping page, select it in the **Current Criteria** box and click **Remove**. To delete *all* the search expressions, *except* for the expression that you created on the General tabbed page, click **Clear**.

9. To edit a search expression created on the scoping page, do these steps:
   a) Select the search expression in the **Current Criteria** box.
   b) Change the operators, qualifier, or values.
   c) Click **Update** to update the search expression in the **Current Criteria** box.
10. Click **Search** to begin searching.

    The results list appears.

Searching Branches

When you are searching for bibliographic and item records, you can choose which branches you want Polaris to search, as well as which collections to search within each branch. The Find Tool's Branches tabbed page lists all the assigned branches, along with their collections, in your library system. Searches for bibliographic records by branch or collection return results based on the linked item records. If the bibliographic record is not linked to any item records with that assigned branch, it does not appear in the results list on the Branches tab. If the bibliographic record is not linked to any item records with that collection, it does not appear in the results list on the Collections tab. Bibliographic records without linked item records do not appear in the results list.

Important:
Search results, except for bibliographic titles and call number browse searches, may be filtered so the results list includes only those results that you have permission to access. If the Staff Client profile **Find Tool: Filter search results by permission** is set to **Yes**, you will see only those records for which you have **Access** permission. For more information about setting permissions in Polaris, see "Setting Administration Permissions" in the *Polaris Administration Guide 4.1R2*.

See the following topic:

- "Search one or more branches" on page 73

Search one or more branches

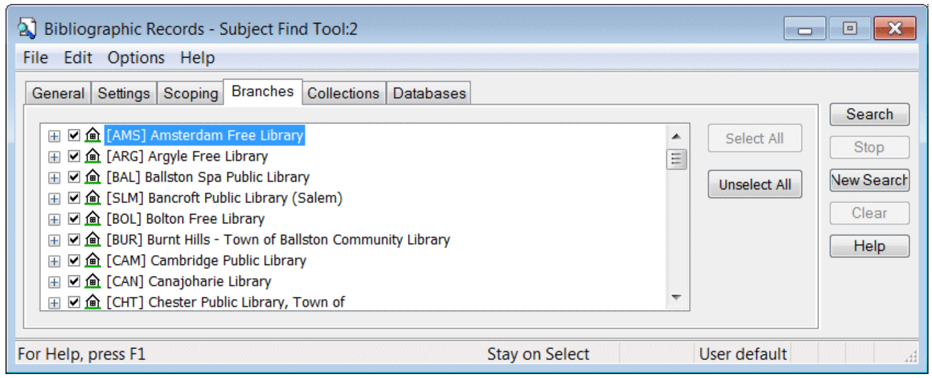
When you select a branch, the search looks for items with that assigned branch or for bibliographic records linked to items with that assigned branch. If no items with that assigned branch are linked to the bibliographic record, it will not be found.

Tip:
If you want to find bibliographic records owned by a certain branch but with no linked item records, do a Scoping search instead of a Branch search. A branch search looks for bibliographic records with linked items assigned to the branch. If no items are linked, the bibliographic record is not found.

Follow these steps to search for bibliographic and item records by branch and by collection associated with each branch.

Note:
You can search by branches only in normal search mode.

1. On the Find Tool - General tabbed page, fill in the **Object**, **Search by**, **Type**, and **For** boxes (see "Doing a Basic Search" on page 45).
2. Click the **Branches** tab to display the Branches tabbed page.



By default, all branches and collections are selected.

Tip:
To search all branches, click **Select All**.

3. Click **Unselect All** to clear the check boxes for all branches and collections.

   The status bar displays **BR** to indicate that you are searching by branch.

4. If you want to search all the collections in a branch, select the check box next to each branch to be searched.

5. If you want to search by particular collections in a branch, follow these steps:

   a) Click the plus sign [+] next to the branch.

   The plus sign is replaced by a minus sign [-]. All the collections for the branch appear.

   b) Select the check box next to each collection you want to search.

   The check box next to the branch is grayed out to indicate that one or more collections are not to be searched within the branch.

Tip:
To start a new search, click **New Search**. The General tabbed page appears. To reset the list, click **Reset**.

6. Click **Search** to begin the search.

   The results list appears.

Related Information

When searching by branch and collection, you can also use other searching features. See the following topics:

- "Do a power search" on page 66
- "Do a SQL search" on page 68
- "Do a search with scoping" on page 70

Searching Collections

You can search for item records or bibliographic records by collection, but when you search for bibliographic records by collection, the search is actually looking for the linked item records with the selected collection. If the bibliographic record has no linked items in that collection, the bibliographic record is not included in the results. The Find Tool's Collections tabbed page lists all the assigned collections in the system, along with their associated branches. You can search by collection and by the branches that share the collection.

See the following topic:

- "Search one or more collections" on page 75

Search one or more collections

When you select a collection, the search looks for items in that collection or for bibliographic records linked to items in that collection. If no items with that collection are linked to the bibliographic record, it will not be found.

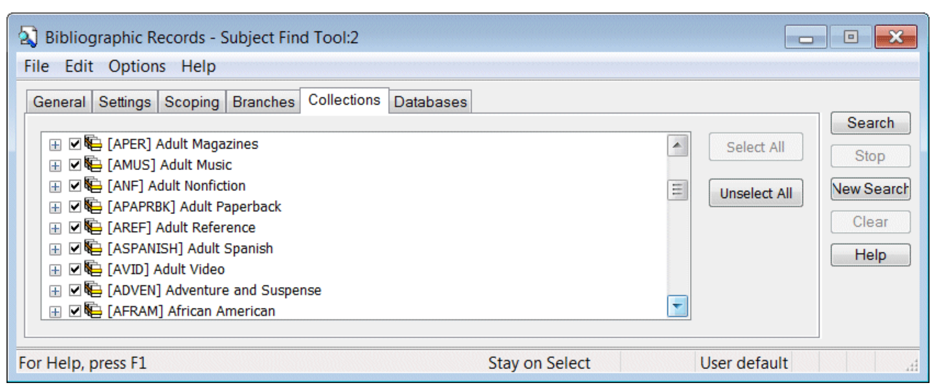
Follow these steps to search for bibliographic and item records by collection and by branch.

Note:
You can search using collections only in normal search mode.

1. On the Find Tool - General tabbed page, fill in the **Object**, **Search by**, **Type**, and **For** boxes (see "Doing a Basic Search" on page 45).

Tip:
If you search for bibliographic records by collection, the search looks for bibliographic records linked to item records in that collection. Bibliographic records that are not linked to item records do not appear in the results list.

2. Click the **Collections** tab to display the Collections tabbed page.



By default, all collections and the branches that use each collection are selected.

Tip:
To search all collections, click **Select All**.

3. Click **Unselect All** to clear the check boxes for all collections and their branches.

The status bar displays **CO** to indicate that you are searching by collection.

4. If you want to search all the branches that use a collection, select the check box next to each collection to be searched.
5. If you want to search by particular branches associated with a collection, follow these steps:
   a) Click the plus sign [+] next to the collection.

      The plus sign is replaced by a minus sign [-]. All the branches for the collection appear.

   b) Select the check box next to each branch you want to search.

      The check box next to the collection is grayed out to indicate that one or more branches that use the collection are not to be searched.

Tip:
To start a new search, click **New Search**. The General tabbed page appears. To reset the list, click **Reset**.

6. Click **Search** to begin the search.

   The results list appears.

Related Information

When searching by branch and collection, you can also use other searching features. See the following topics:

- "Do a power search" on page 66
- "Do a SQL search" on page 68
- "Do a search with scoping" on page 70

Searching Remote Databases

When you are searching for bibliographic records, you may be able to search remote sites using Z39.50 standard search protocol. If you have a subscription to Polaris ZMARC, the Polaris ZMARC databases appear in the list of databases. You can choose to search the local Polaris database simultaneously along with one or more remote databases.

Z39.50 searching depends on standard Bib-1 Use attributes for search access points. If a standard Bib-1 Use attribute has not been defined for a search access point, Polaris relies on proprietary Bib-1 Use attributes. (Bib-1 Use attributes between 5,000 and 10,000 are reserved for these proprietary attributes). These non-standard search access points may not work with Z39.50 target sites. For example, the UPC barcode does not have a standard Bib-1 Use attribute. If you search bibliographic records at a Z39.50 target site for the UPC barcode number, setting the **Search by** field to **UPC number** in the Polaris Find Tool, the search will likely fail. However, if you search for the UPC barcode number by **Other system number** (a standard access point), you will likely find the title. For a list of standard and proprietary Bib-1 Use Attributes, see "Bib-1 Use Attributes in Polaris Searches" in the *Polaris Administration Guide 4.1R2*.

Note:
Before you are able to search a remote database, it must be registered as a Z39.50 target and set to display in the Find Tool. See "Registering Remote Resource Servers" in the *Polaris Administration Guide 4.1R2* and "Controlling Database Access in the Staff Client" in the *Polaris Administration Guide 4.1R2*.

See the following topic:

- "Search multiple and remote databases" on page 77

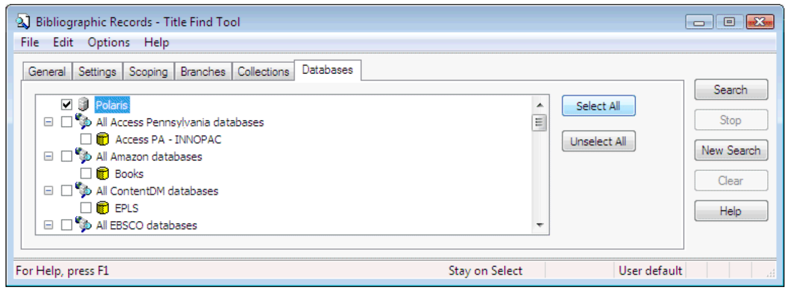
Search multiple and remote databases

Follow these steps to search for records in multiple databases. They may include your Polaris database and remote databases that are located at Z39.50 sites.

Note:
You can search remote databases in normal and power search modes.

1. On the Find Tool - General tabbed page, fill in the **Object**, **Search by**, **Type**, and **For** boxes on the General tabbed page (see "Doing a Basic Search" on page 45).
2. Click the **Databases** tab to display the Databases tabbed page.

   By default, your Polaris database is selected.



3. Select the databases to be searched:

Tip:
Click the minus (-) sign next to a site to display only the site, without its associated databases. Click the plus (+) sign next to a site to display the site's associated databases.

- To select the Polaris databases and all remote sites' databases, click **Select All**.

  The check box next to each site and each database is automatically selected.
- To select one or more sites (including all the listed databases at the sites), select the check box next to each site.

  The check box next to each database is automatically selected.
- To select one or more databases at a site, select the check box next to each database that you want to search.

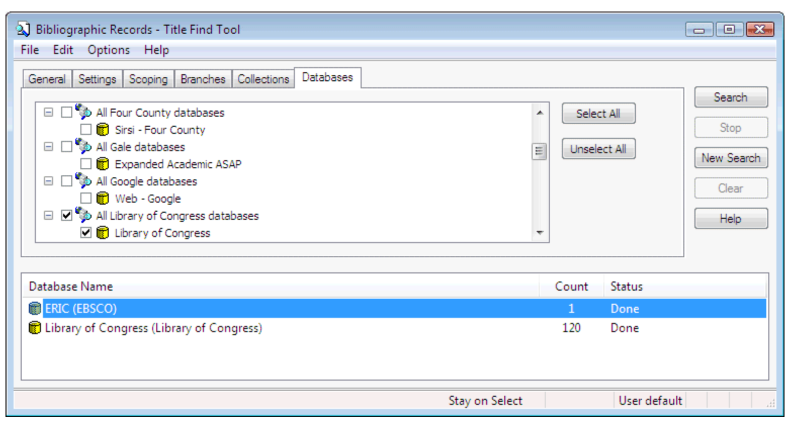
  The check box next to the site is automatically selected, but it is also grayed out to indicate that one or more databases at the site are not selected.

The status bar displays **DB** to indicate that you are searching by database.

Tip:
To start a new search, click **New search**. The General tabbed page appears.
To reset the list, click **Reset**.

4. Click **Search** to begin searching.

The database results list appears with a count of the records found. If you searched multiple databases, the records from each database are displayed in separate result sets.



5. Double-click a database to display its results.

A dialog box displays the list of records for the selected database.

6. Double-click a record in the list to open it in a Polaris workform.

Related Information

- "Do a power search" on page 66
- "Do a SQL search" on page 68
- "Do a search with scoping" on page 70
- "Copy a MARC record from a remote source" in the *Polaris Cataloging Guide 4.1R2*.
- "Bib-1 Use Attributes in Polaris Searches" in the *Polaris Administration Guide 4.1R2*

Creating and Deleting Records

You can create new records from the Polaris Shortcut Bar and from workforms. This unit covers the methods for creating records that are common to all Polaris subsystems. Although specific details vary depending on the type of record you are creating, the general procedures are the same for all records.

Note:
You can also use more automated methods to create specific types of records, such as importing MARC records to create cataloging records, and bulk-adding titles to create a purchase order. For information on these methods, see online Help or the appropriate subsystem guide.

When you enter data to create or modify records in Polaris, be sure to follow the conventions your library has established. For example, your library may have decided to use all capitals for codes and abbreviations, and initial capitals for words. While this may not affect the way Polaris processes information, it does affect the appearance of indexes and reports.

This unit covers the following topics:

- “Creating New Records in Polaris” on page 81
- “Deleting Records” on page 85

Creating New Records in Polaris

If you have the appropriate permissions, throughout Polaris you can create new records from the Polaris Shortcut Bar or from an existing record's workform. Some types of records can be created by linking from an existing record displayed in a workform or in the Find Tool results list. Each record is assigned a unique control number.

See the following topics:

- "Create a new record from the Shortcut Bar" on page 81
- "Create a new record from a workform" on page 82
- "Create a linked record from a workform" on page 82
- "Create a new record from the Find Tool results list" on page 83

Create a new record from the Shortcut Bar

You can create primary records from the Polaris Shortcut Bar, but not records that are dependent on another record for their existence. For example, you can create a purchase order, but not a purchase order line item, with this method. Follow these steps to create a record from the Polaris Shortcut Bar.

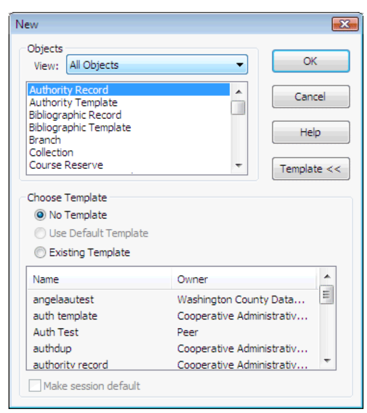
Tip:

Click [icon] or press **CTRL+N** to display the New dialog box.

Tip:
Type the first letter of the record type to go to all records that begin with that letter. For example, type **i** to go to **Invoice** and scroll slightly to see **Item Record** and **Item Template**. To limit the record types in the **Objects** list, select the subsystem in the **View** box.

1. Select **File, New** from the Shortcut Bar.

   The New dialog box appears.



2. Select the appropriate record type in the **Objects** list.

   If templates are listed, and you want to use one, select **Existing template**, and select a template. If you are creating multiple records using the same template, you can select the template, and select the **Make session default** box. When you create the next record of the same type, the template is automatically selected.

3. Click **OK**.

   The workform appears.

4. Enter information in the workform.
5. Select **File, Save** to save the record.

   A message in the status bar indicates the record was saved.

Create a new record from a workform

For certain records, you can create a record of the same type as the one displayed in an open workform. Follow these steps to create a record from a workform.

1. Use the Polaris Find Tool to locate and display an existing record in a workform. See “Doing a Basic Search” on page 45.
2. Select **File, New**, click , or press **CTRL+N** from the workform menu bar.

   The New Record dialog box appears.

3. Select one of the following options.
   - **Clear Work Form** - The data is cleared from the workform (except default data), and a new, blank workform appears.
   - **Copy Existing Work Form** - The original workform closes, and a copy of the workform appears with a new Polaris control number in the title bar.
   - **Use Existing Template** - This option appears only for record types that have templates. Select **Templates>>** to display a list of templates, and select a template.
4. Click **Ok**.
5. Modify the data, as necessary.
6. Select **File, Save,** press **CTRL+S**, or click to save the record.

   The record is saved with a new control number, and a message in the status bar indicates the record was saved.

Create a linked record from a workform

For some record types, you can create a record that is linked to the record displayed in an open workform. When records are linked, you can easily access one from the other. Follow these steps to create a new record that is linked to the displayed record.

1. Use the Polaris Find Tool to search for and select the record. See “Doing a Basic Search” on page 45.

   The record is displayed in the appropriate workform.

2. From the workform menu bar, select **Tools, Create** and select the record type.
3. Enter information in the fields in the workform.
4. Select **File, Save,** press **CTRL+S**, or click to save the record.

   A message in the status bar indicates the record was saved.

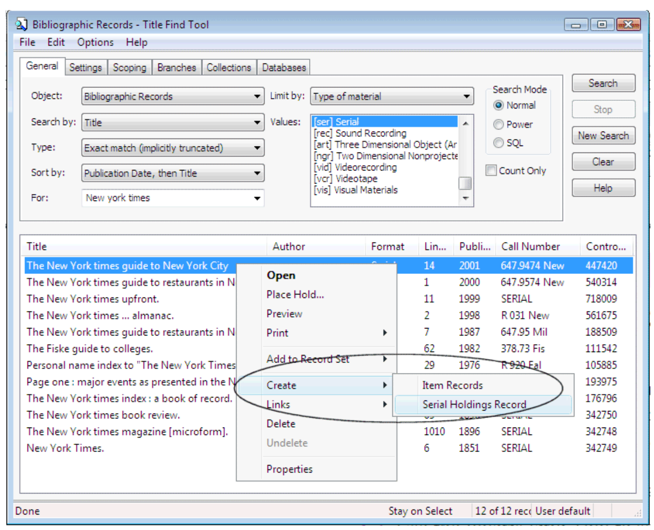
Create a new record from the Find Tool results list

You can create new records from a variety of types of records displayed in the Polaris Find Tool results list. Follow these steps to create a new record from a record listed in the Polaris Find Tool results.

1. Use the Polaris Find Tool to search for the record. See “Doing a Basic Search” on page 45.

   The records that meet the criteria you specified are displayed in the Find Tool results list.

2. Select the record that you want to use to create the new record.
3. Right-click, select **Create**, and select the type of record you want to create.



   The workform for the type of record opens.

4. Enter information in the fields in the workform.
5. Select **File, Save,** press **CTRL+S**, or click to save the record.

   A message in the status bar indicates the record was saved.

Related Information

Various Polaris subsystems offer additional methods for creating records:

- **Using Templates** - You can use templates to create new records such as item, bibliographic, and purchase order records. Using templates to create records is more efficient and ensures that certain standard information is entered the same way in each new record. See "Using Cataloging Templates" in the *Polaris Cataloging Guide 4.1R2* and "Setting Up Templates for Acquisitions" in the *Polaris Acquisitions Guide 4.1R2*.
- **Creating multiple item records for the same title** - You can create item records for multiple copies of the same title in one step. See "Create multiple item records for a single title" in the *Polaris Cataloging Guide 4.1R2*.
- **Importing records** - You can import bibliographic or authority records to create new records in the Polaris database. Item records can be created automatically from embedded holdings data in imported bibliographic records. See "Importing Records" on page 91. For information on automatic imports of ebook bibliographic records, see "Cataloging Ebooks" in the *Polaris Cataloging Guide 4.1R2*.
- **Creating purchase orders by bulk adding** - You can create new purchase orders by bulk adding titles from a bibliographic record set. See "Create a purchase order by bulk adding titles" in the *Polaris Acquisitions Guide 4.1R2*.
- **Creating serials issue records** - You can create serial issue records through automatic prediction. See "Use a template to create a publication pattern" on page 34.

Deleting Records

If you have the appropriate permissions, you can delete certain kinds of Polaris records. When you delete some types of records, you are permanently removing them from the Polaris database, and they *cannot* be recovered. However, for cataloging records, your Polaris Administrator can set the following profiles to control deletion of these records: **Retain Deleted Authority Records, Retain Deleted Bibliographic Records** and **Retain Deleted Item Records.** If these profiles are set to **Yes**, cataloging records are marked for deletion, but they are not removed from the Polaris database unless you run a purge process. See "Purge cataloging records" in the *Polaris Cataloging Guide 4.1R2*.

You can delete records from the Polaris Find Tool, from record sets, from linked list boxes and from workforms. If the record you want to delete is linked to one or more other records, a message tells you that the record cannot be deleted. If you have the required permissions, you can suppress the unbreakable and breakable links messages when you are deleting multiple item, bibliographic, or patron records. This prevents a message from appearing for each record that has these links when you are deleting many records at once.

Important:
For specific information on deleting bibliographic and item records, see "Delete bibliographic or item records" in the *Polaris Cataloging Guide 4.1R2*. For authority records, see "Delete authority records" in the *Polaris Cataloging Guide 4.1R2*. For patron records, see "Deleting Patron Records" in the *Polaris Patron Services Guide 4.1R2*.

See the following topics:

- "Delete a record" on page 85
- "Delete multiple records" on page 86

Delete a record

Follow these steps to delete a record from the Polaris database.

Important:
For records other than bibliographic, item, or authority records, deleting records permanently removes the record from the Polaris database, and the record cannot be recovered. Your Polaris administrator specifies whether item records, bibliographic records, and authority records are retained even though they are marked for deletion. A purge process, with separate permissions, permanently deletes these records when marked for deletion. For more information, see "Purge cataloging records" in the *Polaris Cataloging Guide 4.1R2*.

1. Use the Polaris Find Tool to locate and display a record in its workform. See "Doing a Basic Search" on page 45.

Tip:
You can delete a record directly from the Polaris Find Tool. Right-click the record, and select **Delete** from the context menu.

2. Select **File, Delete**, click or press **CTRL+D**.

   The following message box appears: **Are you sure you want to permanently delete** [*record type*]**?**

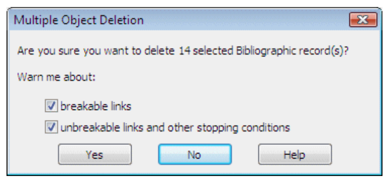
3. Click **Yes** to confirm that you want to delete the record.

Delete multiple records

Follow these steps to delete multiple records from the Polaris database.

1. Select multiple records from the Find Tool results list, a list box, or a record set.
2. Right-click and select **Delete** from the context menu.

   If you are deleting bibliographic, item, or patron records, the Multiple Object Deletion dialog box appears.



3. If you have the required permissions, and you want to keep warning messages from displaying whenever a record with links to other records is encountered, select one or both of the following check boxes.
   - **breakable links** - If you select this option, the records with breakable links will be deleted without any warning messages appearing.
   - **unbreakable links and other stopping conditions** - If you select this option, the records with unbreakable links are not deleted, but they are skipped over without any warning messages appearing.
4. Click **Yes** to delete the selected records.

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

Related Information

- Cataloging permissions to suppress warnings when deleting multiple bibliographic or item records:
  - **Suppress warnings for breakable links when deleting multiple bibliographic records: Allow**
  - **Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple bibliographic records: Allow**
  - **Suppress warnings for breakable links when deleting multiple item records: Allow**
  - **Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple item records: Allow**

- Circulation permissions to suppress warning messages when deleting multiple patron records:
  - **Suppress warnings for breakable links when deleting multiple patron records: Allow**
  - **Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple patron records: Allow**

Creating and Using Record Sets

You can gather patron, item, bibliographic, or authority records together in record sets so you can process the records together. In addition, you can gather records with certain characteristics in a record set, sort them, and then print the record set for a quick report. Another use for record sets is to publish the URL to a bibliographic record set in the Polaris PowerPAC's portal page, dashboard, or Web site page as a quick way for patrons to access title lists such as summer reading lists. The owner of the record set determines which users can access and/or modify. For more information on searching for record sets from the Polaris PowerPAC, see "Searching Record Sets (Polaris PowerPAC)" in the *Polaris Public Access Administration Guide 4.1R2*.

In addition, if your organization has Polaris SimplyReports, you can specify criteria for the records in SimplyReports, and then send all the records to a new record set that will be available in the Polaris Staff Client. For more information, see SimplyReports online help.

You can create record sets from Find Tool results, from the Polaris Shortcut Bar, from a workform, or from another record set.

See the following topics:

Note:
Cataloging record sets can be created during automatic processes. For more information, see "Using Cataloging Record Sets" in the *Polaris Cataloging Guide 4.1R2*.

Tip:
When you create a record set from the Find Tool results or from another record set, a warning message appears if the number of records will exceed the number specified in the staff client profile **Find Tool/record set-to-record-set creation: Record set size warning threshold**.

This unit covers the following topics:

- "Create a record set from all the Find Tool results" on page 89
- "Create a record set from specific Find Tool results" on page 91
- "Create a record set from the Polaris Shortcut Bar" on page 92
- "Create a record set from the Patron Registration workform" on page 93
- "Add records to a record set" on page 94
- "Remove records from a record set" on page 95
- "Delete member records from the database" on page 95
- "Delete record sets from the Find Tool" on page 96
- "Delete a record set from the Record Set workform" on page 97

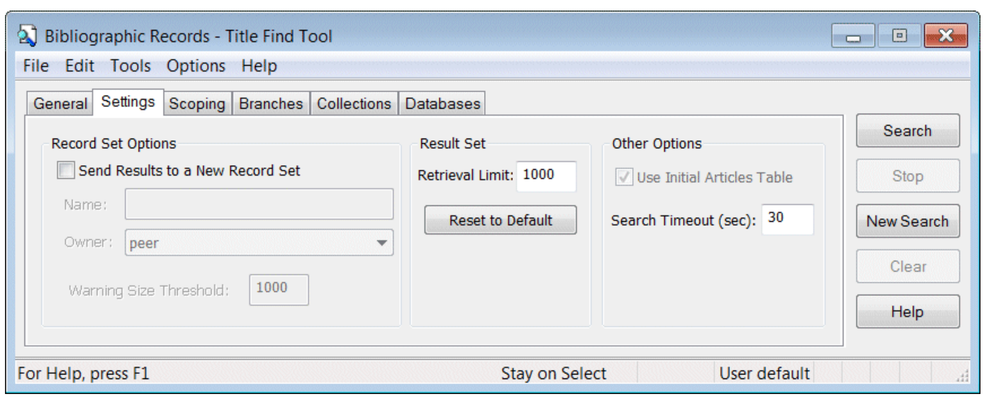
Create a record set from all the Find Tool results

Follow these steps to send all the records in the search results to a record set.

1. Open the Find Tool.
2. Enter the search criteria on the General tab of the Find Tool, but do not click **Search** yet.
3. Select the **Settings** tab.

   The Settings tabbed page appears.
4. Select **Send Results to a New Record Set**.

Tip:
If you do not need to see the Find Tool results list before creating the record set, select **Count only** on the General tab to make sure all the records that meet the criteria you set are included in the record set. If you do not select **Count only**, the number of records in the record set will be limited to the number in the **Retrieval Limit** box.



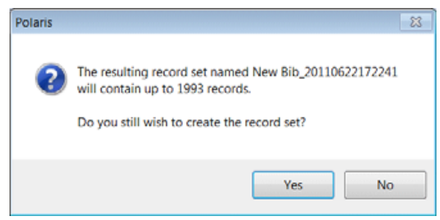
5. Type the name you want to give the record set in the **Name** box.

6. Select the record set's owner in the **Owner** box.

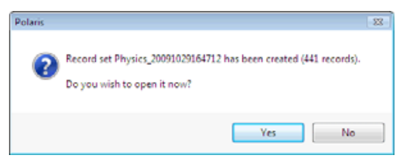
   Important:
   Only the owner can modify the record set. If the owner is an organization, all the organization's staff members can modify the record set (if they have the appropriate permissions). If you have the permission, **Use 'own' cataloging record sets: Allow**, you can create cataloging record sets that no other users can access, including your system administrator. When you create a new cataloging record set, your user name will be in the **Owner** box by default if you have this permission. To allow other users to access the record set, first select a different owner before saving the record set.

7. Click **Search**.

   If the number of records in the record set will exceed the limit set in Polaris Administration, a warning mess age appears. Click **Yes** to continue creating the record set or **No** to cancel creation of the record set.



   If the record set does not exceed the record limit, a message informs you that the record set was created and asks if you want to open it.



8. Click **Yes** to open the record set.

   The record set workform appears with the name you gave the record set and the date and time it was created.

Related Information

- "Changing Multiple Bibliographic Records" in the *Polaris Cataloging Guide 4.1R2*.
- "Changing Multiple Item Records" in the *Polaris Cataloging Guide 4.1R2*.

Create a record set from specific Find Tool results

Follow these steps if you want to choose which Find Tool results to add to a record set.

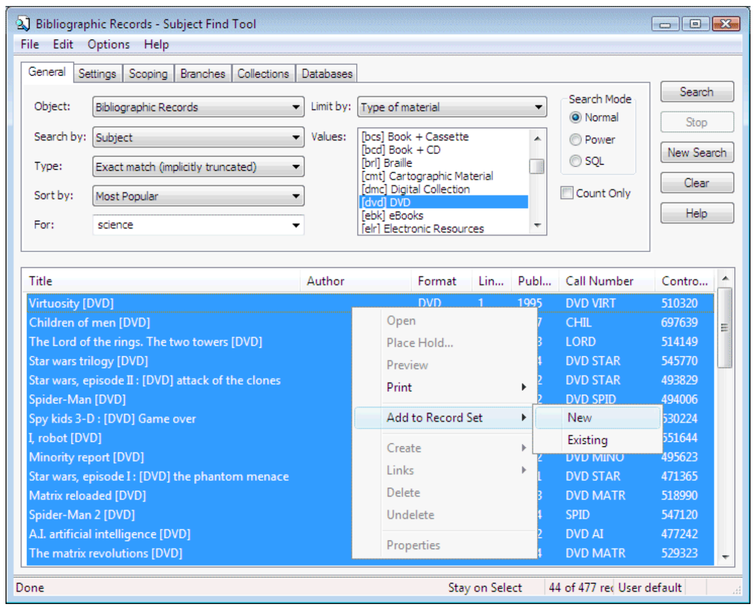
1. Open the Find Tool.
2. Enter the search criteria.
3. Click **Search**.

   The Find Tool results display.

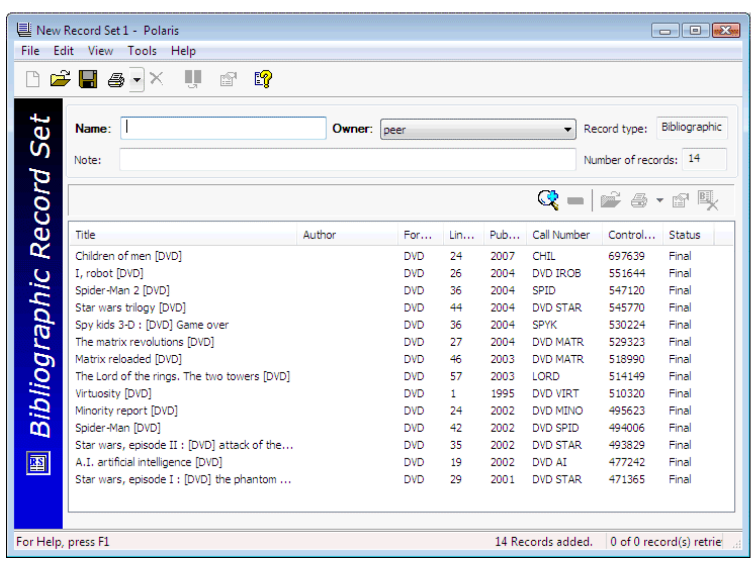
Tips:
Press **CTRL+SHIFT+A** to load all records that meet your search criteria. To select records listed one after the other in the list, click with the left mouse button on the first record you want to select, hold down the **SHIFT** key, and click on the last record you want to select. To select specific records, click on each record while holding down the **CTRL** key. To select all the records in the record set, press **CTRL+A**.

4. Select the results to add to the record set.

   Right-click and select **Add to Record Set, New**.



The Record Set workform appears containing the records you selected.



5. Type a name for the record set in the **Name** box.

6. If you want to change the record set's owner, select it in the **Owner** box.

   Important:
   Only the owner can modify the record set. If the owner is an organization, all the organization's staff members can modify the record set (if they have the appropriate permissions). If you have the permission, **Use 'own' cataloging record sets: Allow**, you can create record sets that no other users can access, including your system administrator. When you create a new record set, your user name will be in the **Owner** box by default if you have this permission. To allow other users to access the record set, first select a different owner before saving the record set.

7. If you want to include a note, type it in the **Note** box.

8. Select **File, Save**, press **CTRL+S** or click .

Create a record set from the Polaris Shortcut Bar

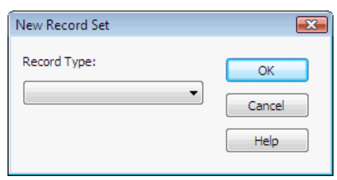
Follow these steps to create a new record set from the Polaris Shortcut Bar.

1. Select **File, New**, click or press **CTRL + N**.

   The New dialog box appears.

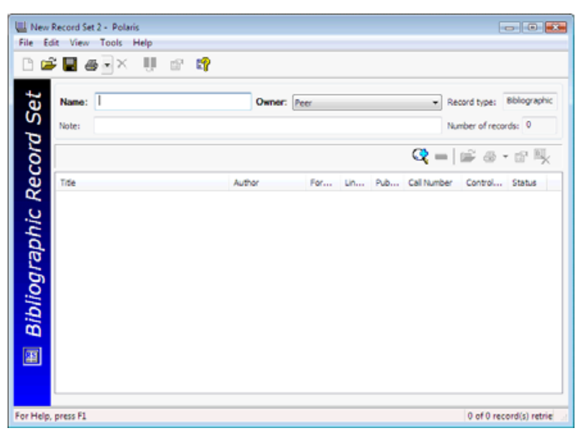
2. Select **Record Set** from the **Objects** list, and click **OK**.

   The New Record Set dialog box appears.



3. Select the record type in the **Record Type** box, and click **OK**.

   An empty New Record Set workform appears.



4. Type a name for the record set in the **Name** box.

5. Specify a person or library as the record set owner in the **Owner** box.

    Important:
    Only the owner can modify the record set. If the owner is an organization, only organization's staff members can modify the record set (if they have the appropriate permissions). If you have the permission, **Use 'own' cataloging record sets: Allow**, you can create record sets that no other users can access, including your system administrator. When you create a new record set, your user name will be in the **Owner** box by default if you have this permission. To allow other users to access the record set, first select a different owner before saving the record set.

6. (Optional) Type notes in the **Note** box.
7. Add records to the record set. See "Add records to a record set" on page 94.
8. Select **File, Save,** press **CTRL+S**, or click .

Create a record set from the Patron Registration workform

1-2-3

Follow these steps to create a record set from the Patron Registration workform.

1. Display the Patron Registration workform for the patron record you want to add to a record set.
2. Select **Tools, Add to Record Set, New** from the context menu.

    The Record Set workform appears with one patron record listed.

3. Type a name for the record set in the **Name** box.

    Note:
    Only the owner can modify the record set. If the owner is an organization, all the staff members of the organization can modify the record set (if they have the appropriate permissions).

4. If you want to change the record set's owner, select it in the **Owner** box.
5. If you want to include a note, type it in the **Note** box.
6. Add other patron records to the record set. See "Add records to a record set" on page 94.
7. Select **File, Save,** press **CTRL+S**, or click to save the record set.

Related Information

- **Bulk changing patron records using a record set** - See "Bulk-Changing Patron Records" in the *Polaris Patron Services Guide 4.1R2*.
- **Add multiple patron addresses to a mailing label set at once** - See "Creating Patron Mailing Labels" in the *Polaris Patron Services Guide 4.1R2*.

Add records to a record set

Follow these steps to add records to a new or existing record set.

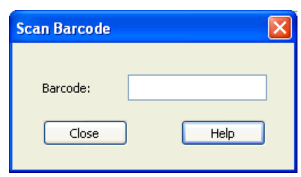
> **Note:**
> You can use the Find Tool to search for an existing record set by the record set name, owner, or creation date.

1. Open the Record Set workform for a new or existing record set.
2. Use one of the following methods to add the records:

> **Note:**
> Scanning a patron's barcode on the Patron Record Set workform adds the patron record to the record set, and scanning an item's barcode on the Item Record Set workform adds the item record to the record set. However, scanning an item record on the Bibliographic Record Set adds that item's linked bibliographic record to the record set.

- Select **Tools, Add**, press **CTRL+E**, or click . The Polaris Find Tool appears. Search for the record, and select it from the results list.
- Select **Tools, Add, Scan**, press **CTRL+K**, or click .

  The Scan Barcode dialog box appears, in which you scan the barcode (or type the barcode and press **ENTER**).



Repeat the previous step to add additional records.

3. If you scanned records, click **Close** on the Scan Barcode dialog box when you are done scanning.

   Record added appears in the status bar.

4. Select **File, Save,** press **CTRL+S**, or click  to save the record set.

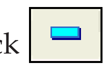
   After the record set is saved, the **Number of records** box displays the current number of records in the record set.

Remove records from a record set

When records are removed from a record set, they are not deleted from the database. Follow these steps to take a record out of a record set.

Tip: 
Click this button on the Shortcut Bar to search for a record set.

1. Display a Record Set workform with one of the following methods:
   - Use the Polaris Find Tool to search for and open an existing record set.
   - Right-click a record in the Find Tool's results list, and select **Links, Record sets** from the context menu (the record must be a member of a record set).
   - Select **Links, Existing, Record Sets** from the workform (the record must be a member of a record set).
2. Select the record(s) you want to remove in the Record list.

   Note:
   Use **CTRL**-click or **SHIFT**-click to select multiple records. To select all the records in the record set, select **Edit**, **Select All**, or press **CTRL+A**.
3. Select **Tools, Remove**, or press **CTRL+R**, or click .

   The records no longer appear in the Records list, but remain in the database as individual records.
4. Select **File, Save** to save the record set.

   The following message appears in the status bar: **The record set was saved successfully**, and the **Number of records** box shows the number of records in the record set.

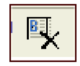
Delete member records from the database

You can delete a record from the database while it is a member of a record set, but it cannot be recovered (unless it is a cataloging record and your Polaris Administrator has set profiles to retain cataloging records, see "Delete a record" on page 85). Follow these steps to delete a record from the Polaris database while it is a member of a record set.

Important:
If you want to remove a record from the record set, but keep the record in the database, see "Remove records from a record set" on page 95.

1. Display the record set containing the record you want to delete in the Record Set workform.
2. Select the record or records you want to delete in the Record list.

Tips:
To select records listed one after the other in the list, click with the left mouse button on the first record you want to select, hold down the **SHIFT** key, and click the last record you want to select. To select specific records, click each record while holding down the **CTRL** key. To select all the records in the record set, press **CTRL+A**.

3. Select **Tools, Delete**, or click .

   A confirmation dialog box appears.

4. Click **Yes** to confirm that you want to delete the record.

   Note:
   If a record cannot be deleted, the delete error dialog box appears. Select from the available options on the dialog box. For information about the conditions that may prevent a patron record from being deleted, see "Blocks to Deleting Records" in the *Polaris Patron Services Guide 4.1R2*.

   The deleted record no longer appears in the Records list. A message in the status bar tells you how many records were deleted.

5. Select **File, Save** to save the record set.

   The following message appears in the status bar: **The record set was saved successfully**, and the **Number of records** box displays the correct number of records in the record set.

Related Information

- **Removing records from the record set without deleting them from the database** - See "Remove records from a record set" on page 95.
- **Deleting record sets without deleting the records** -
  - "Delete record sets from the Find Tool" on page 96
  - "Delete a record set from the Record Set workform" on page 97

Delete record sets from the Find Tool

You can select one or multiple record sets from the Find Tool results list and delete them. The records within the record sets are not deleted. Follow these steps to delete record sets from the Find Tool.

1. Search for the record sets you want to delete.

   The record sets are displayed in the Find Tool results list.

2. Right-click and select **Delete** from the context menu.

   The record sets are deleted, but the records that belonged to the record set remain in the database.

Delete a record set from the Record Set workform

When you delete a record set, the records within the record set remain in the database. A record set cannot be deleted if it is being used (open) by another user. Follow these steps to delete a record set from the Record Set workform.

1. Display the record set to be deleted in the Record Set workform.
2. Select **File, Delete**, press **CTRL+D**, or click on the toolbar.

   A confirmation dialog box appears.
3. Click **Yes** to confirm that you want to delete the record set.

   The Record Set workform closes. The record set is deleted, but member records remain in the database.

Using Polaris Standard Reports

To access the Polaris standard reports, select **Utilities, Reports and Notices** from the Polaris Shortcut Bar and select a subsystem folder. A report may be located in a subsystem's main folder or subfolder. Additionally, **Notices** may be located within a subsystem's main folder, containing applicable subfolders. For example, all acquisitions reports are located in the **Acquisitions** folder, but cataloging reports are located in one of the following subfolders within the **Cataloging** folder: **Authority, Bibliographic, Community,** or **Item**.

Note:
For information on setting up patron services notices, see "Managing Notification" in the *Polaris Patron Services Administration Guide 4.1R2*. For information on setting up claim and cancellation notices, see "Set claim/cancellation notice defaults" in the *Polaris Acquisitions Guide 4.1R2*.

The default output format for a report is a PDF file, or you can choose HTML 4.0, MHTML, Excel, or Comma Separated Values (CSV). Depending on the data in the report, the additional formats (such as Excel and HTML) may not produce the results you expect. You can print or e-mail a report from Adobe Reader.

In Polaris Administration, the settings in the Staff Client **Report Server** profile specify your report server, the organizations that you can select, and the number of entries in the report parameter lists. If your organization's setting is **Unrestricted**, you can run reports for all organizations in your library system. If your organization's setting is **Restrict Organization to Library Only**, you can run reports for your branch (the branch where you are logged in) and all other branches associated with your parent library. If your organization's setting is **Restrict organization to Branch Only**, you can run reports only for your branch (the branch where you are logged in). See "Specify a server for Reporting Services" in the *Polaris Administration Guide 4.1R2*.

Tip:
To generate, print, or customize reports, you must have the following permission in Polaris Administration: **Access Reports and Notices**.

This unit covers the following topics:

- "Generating, Sending & Customizing Reports" on page 99
- "Standard Polaris Reports List" on page 111

Generating, Sending & Customizing Reports

You can generate standard Polaris reports in various formats, print or e-mail them, and customize them for your library's needs.

See the following topics:

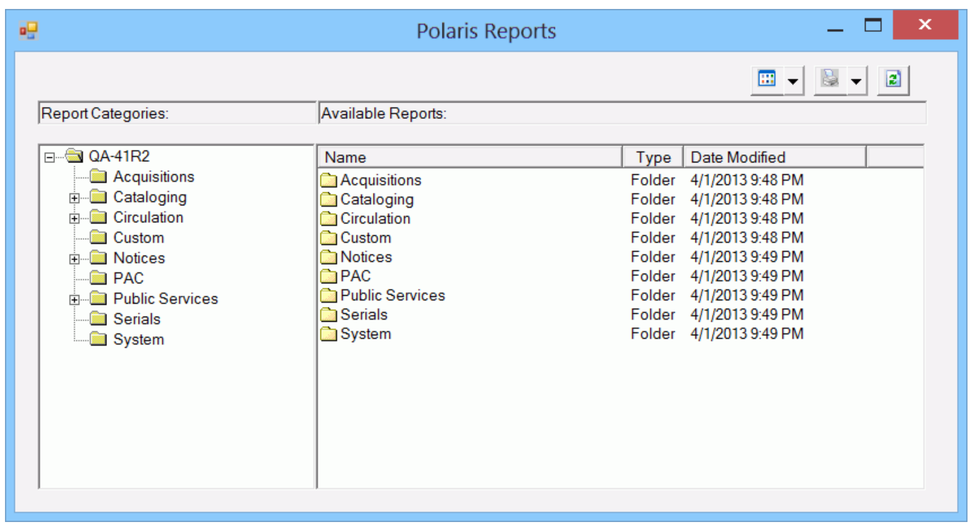
- "Generate a report" on page 99
- "E-mail, save, or print a report using the toolbar" on page 101
- "Customize a report" on page 102
- "Customize an internal report" on page 106

Generate a report

Follow these steps to generate a report.

1. Select **Utilities, Reports and Notices.**

   The Polaris Reports window appears.



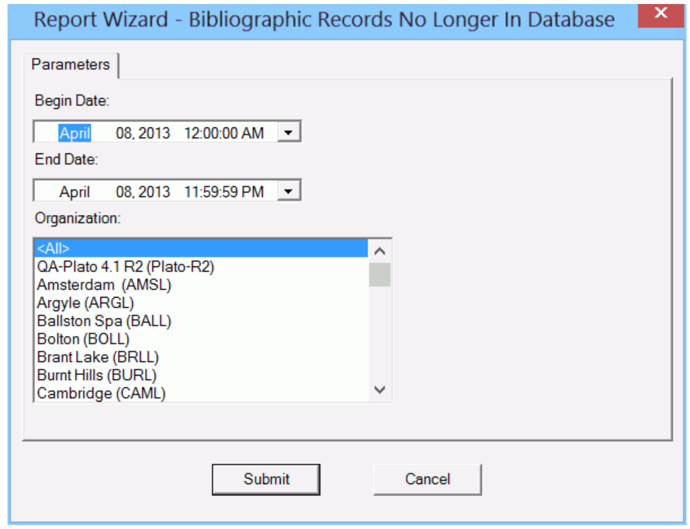
2. Select the subsystem folder for the type of report you want to generate.

   The reports related to the subsystem appear.

   Note:
   Some reports are grouped together under folders within the subsystem folders. Open the folder to select the report.

3. Double-click the report you want to generate.

   The Report Wizard dialog box appears.



Note:
Depending on the report type, you may need to select the organization or organizations, date ranges, or other parameters in the Report Wizard.The branches and libraries that appear in the **Organizations** box depend on the settings in the Staff Client **Report Server** profile in Polaris Administration. See "Specifying Report Servers" in the *Polaris Administration Guide 4.1R2*.

Tip:
If you are entering start and end dates, and you want to include data from today, make sure the **End** date you enter is tomorrow's date. If you enter today's date as the end date, the report may not include data from today.

4. Select the organization or organizations (or select **All** for all organizations) and other parameters, such as the start date and end date for the report.
5. If the Report Wizard has a Sort tab, click the tab, and select the sort option you want for the report.
6. Press **Enter** or click **Submit**.

   Note:
   To cancel the report, press **Esc** or click **Cancel**.

   The Report pdf appears in Adobe Reader unless you have chosen a different format. See "Report Output Types" on page 100.

7. Save, print, or e-mail the report. See "E-mail, save, or print a report using the toolbar" on page 101.

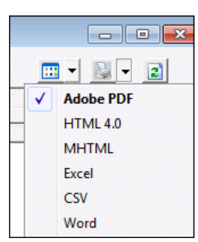
Tip:
The information for the report you just generated stays in the cache for approximately 30 minutes. If you run the same report again within 30 minutes, the information may be from the previous report.

Report Output Types

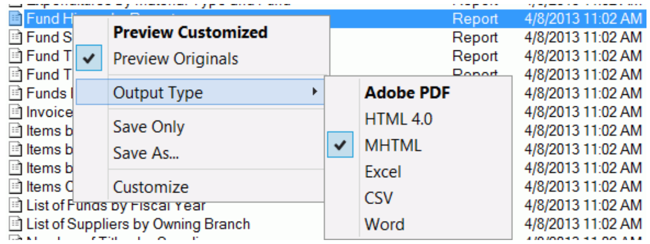
To generate the report in a format other than PDF, use either of these methods:

- Click the down arrow next to the printer button on the Polaris Reports window, and choose another format.

Tip:
Generating the report in HTML format will give you faster results, especially when you expect a long report.



- Select the report, right-click and select the format from the **Output type** sub-menu.



If you select HTML or MHTML, you view the report in a browser window. If you select Excel or Word, the appropriate application opens. If you select CSV, the report opens in CSV format.

E-mail, save, or print a report using the toolbar

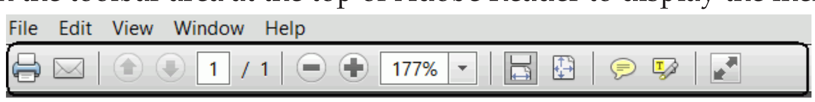
Follow these steps to e-mail, save, or print a report in pdf format.

Tip:
Once you set up the toolbar icons for e-mailing, saving, and printing a report, they appear the next time you open Adobe Reader.

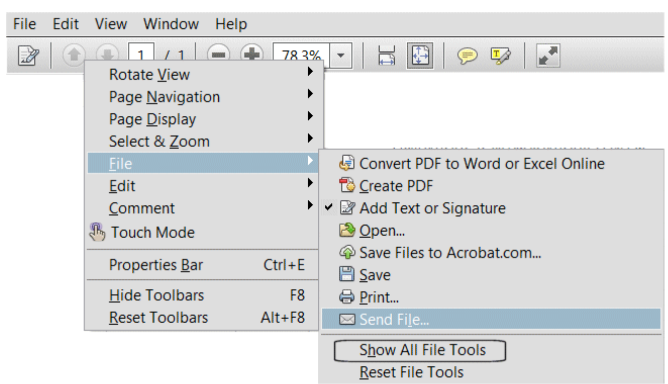
1. Generate a report. See "Generate a report" on page 99.

   The report pdf appears in Adobe Reader.

2. If the e-mail and print icons are not displayed in the toolbar, right-click in the toolbar area at the top of Adobe Reader to display the menu.

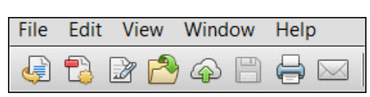


3. Select **File** from the menu to list the tools.
4. Select **Print**, **Send File**, and **Save**. Or, select **Show All File Tools**.



The selected file tools are displayed in the toolbar.

Tip:
If you want to save the report with a different name, select **File, Save as**.

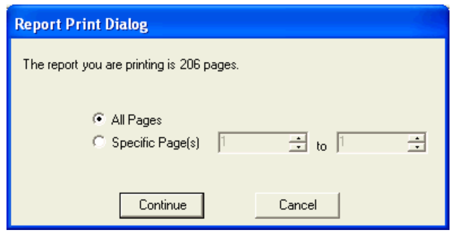


5. Select the appropriate icon to print, email, or save the report.

6. Close Adobe Reader.

Printing Long Reports

When the Report Print Dialog box indicates a report will be very long, you can print specific pages or cancel the report. Select **Specific Page(s)** and select the range of pages to print. Then, click **Continue** to continue printing or **Cancel** to cancel the print. If you click **Cancel**, you can choose to generate the report in HTML format for faster results. See "Report Output Types" on page 100.



Customize a report

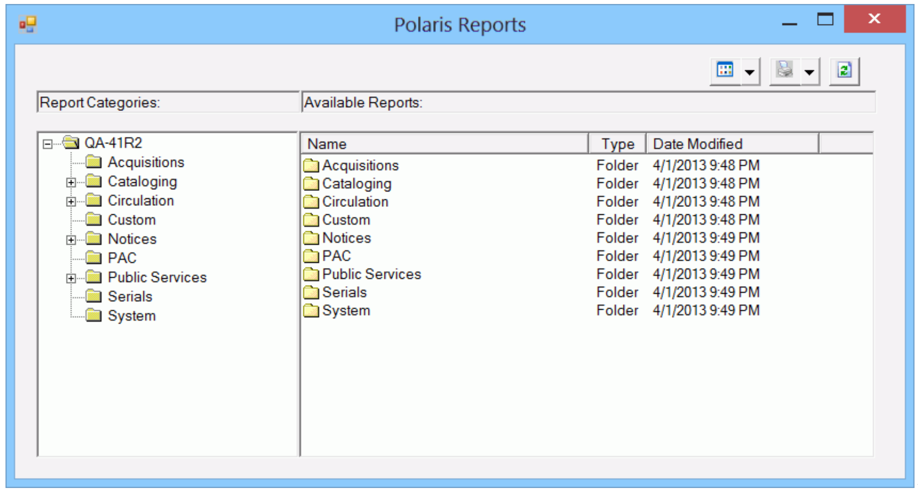
To customize reports, you must have Microsoft's Visual Studio installed. You must also have rights to customize the reports. See "Security for Reports" in the *Polaris Administration Guide 4.1R2*. If your organization has Polaris SimplyReports, and you have the required permissions, you can customize a report created in SimplyReports and make it available from the Polaris Shortcut Bar. For more information, see SimplyReports online Help. When you customize a report, it is saved in the Custom folder for your organization.

Follow these steps to generate a custom report.

> **Important:**
> If you save a custom report in a folder other than Custom, it will be overwritten when a new Polaris release is installed.

1. Select **Utilities, Reports and Notices**.

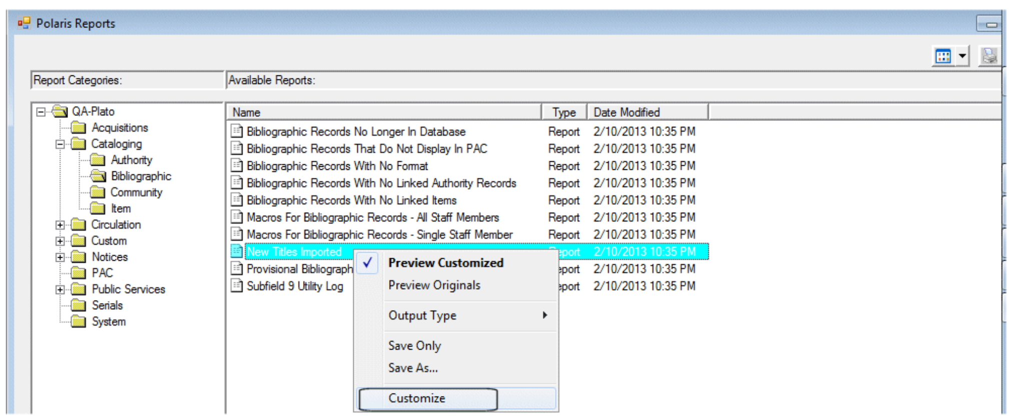
   The Polaris Reports window appears.



2. Select the subsystem folder for the type of report you want to customize.

The reports related to the subsystem appear.

3. Select the report you want to customize, right-click, and select **Customize** from the context menu.



A copy of the report is saved in the **Custom** folder on the reports server.

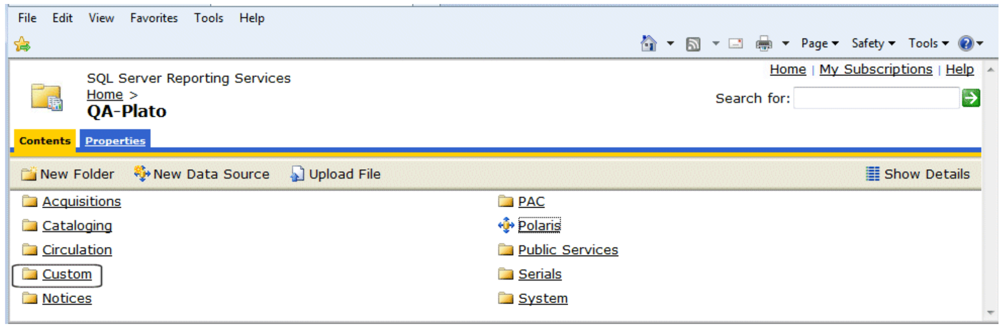
4. Follow these steps to save the copy to the workstation that has Visual Studio.Net:

a) Click the **Start** button. In the search box, type the address of the reports folder on the server with Polaris reports, and click **OK**.

> **Example:**
> If your reports server is *PolarisServer*, type **http://***PolarisServer***/reports.**

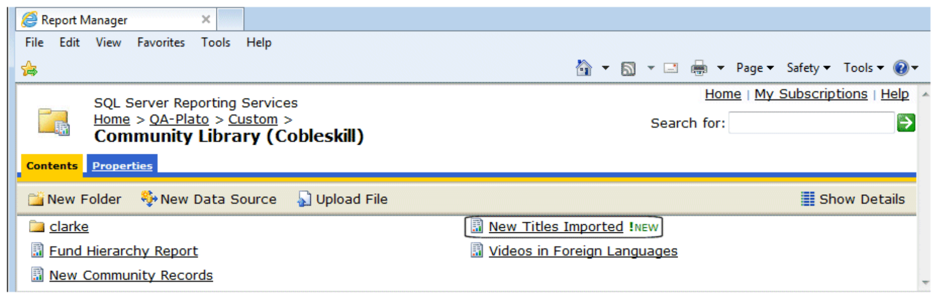
The Report Manager home page appears.

b) Click **Polaris**, and click **Custom** on the Polaris reports page.



The Custom page opens.

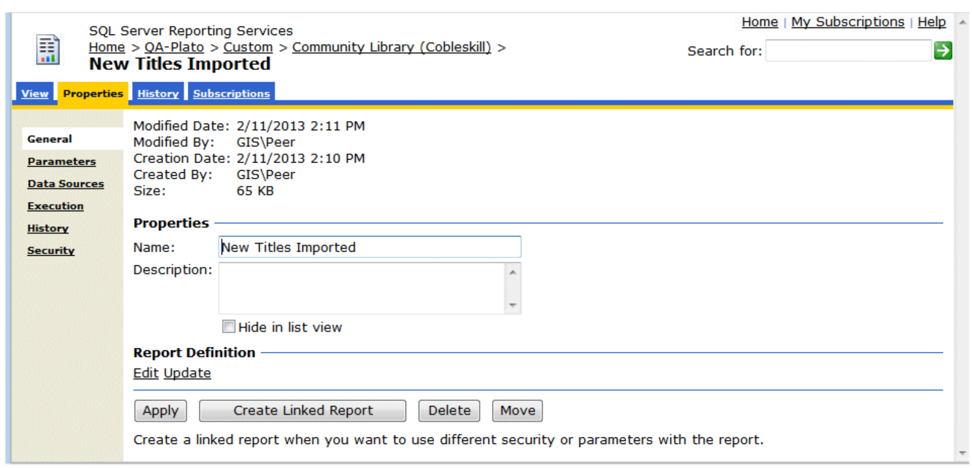
c) Select the report you want to edit.



The report you selected appears in the View tab.

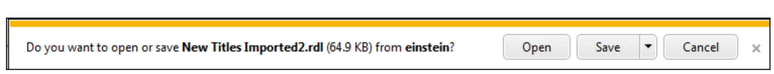
d) Select the **Properties** tab.

The Properties tabbed page appears.



e) Select **Edit** under **Report Definition**.

A message asks whether you want to open or save the report.

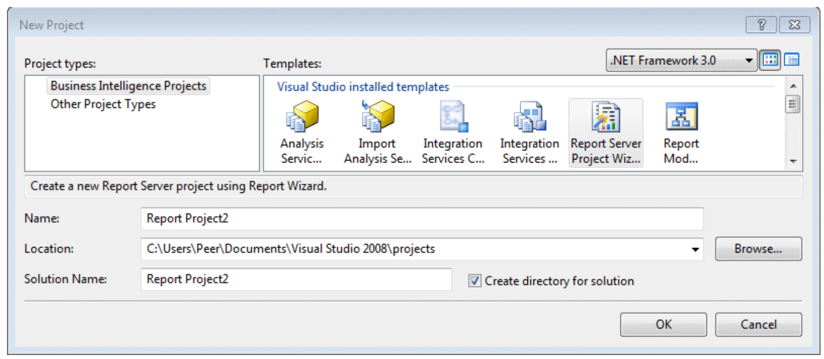


f) Click **Save.**

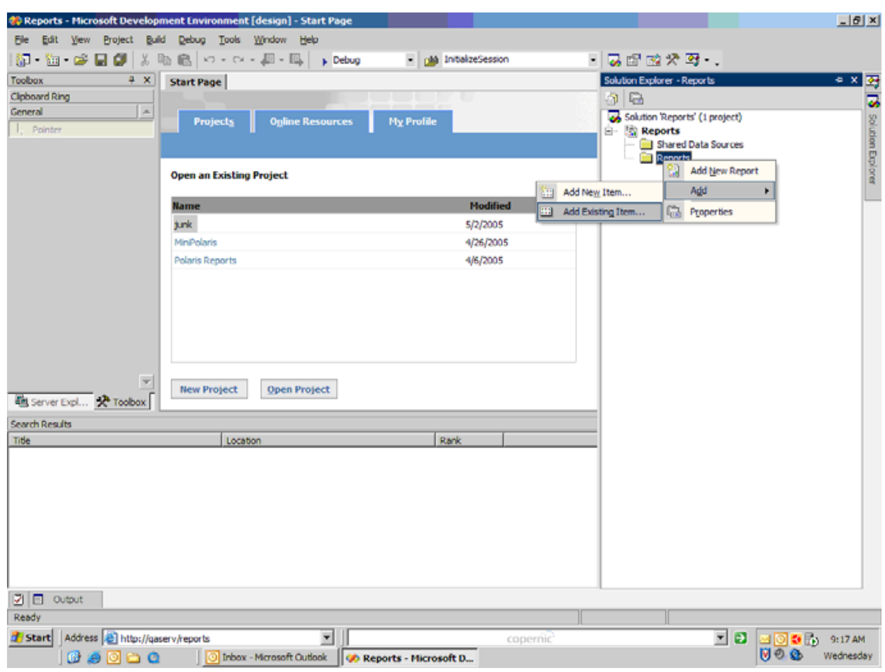
Another message informs you that the download is complete.

5. Save the report to a location accessible to VisualStudio.Net.
6. Select **Start** on the desktop, and select **Programs, Visual Studio.**

   Visual Studio opens.
7. Select **File, New Project**.



8. Select **Business Intelligence Project** in the Project Types list.
9. Set up a new Reports project.
10. Open the project, and add your report to the project.



11. Customize the report using any features available in the application.

    Note:
    Follow the instructions in your Microsoft manual or go to Microsoft's Web site for information on using VisualStudio to customize reports.

12. When you have finished customizing the report, save the customized version in the Custom folder on the report server.
13. Open the Custom folder, select the customized report, and select the **Properties** tab on the report page.
14. Click **Update** to update the report definition in the Polaris Reports Manager.

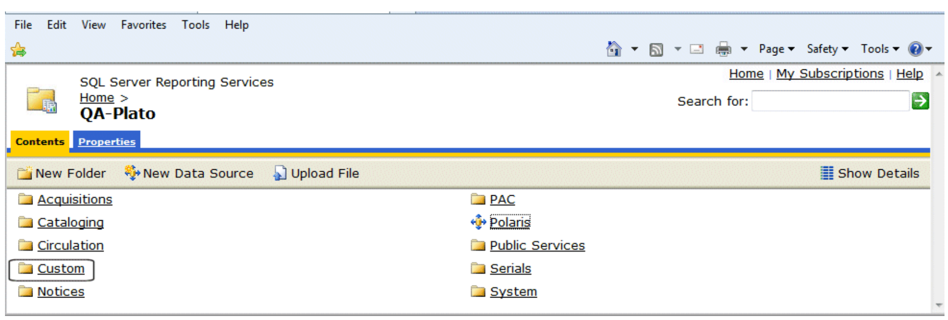
Customize an internal report

You can customize Polaris internal reports, such as purchase orders, using Reporting Services. Follow these steps to customize an internal report.

1. Depending on your Windows version, press the Windows logo key press **R**, or select **Start, Run.**
2. In the Run dialog box, type the address of the reports folder on the server with Polaris reports, and click **OK**.

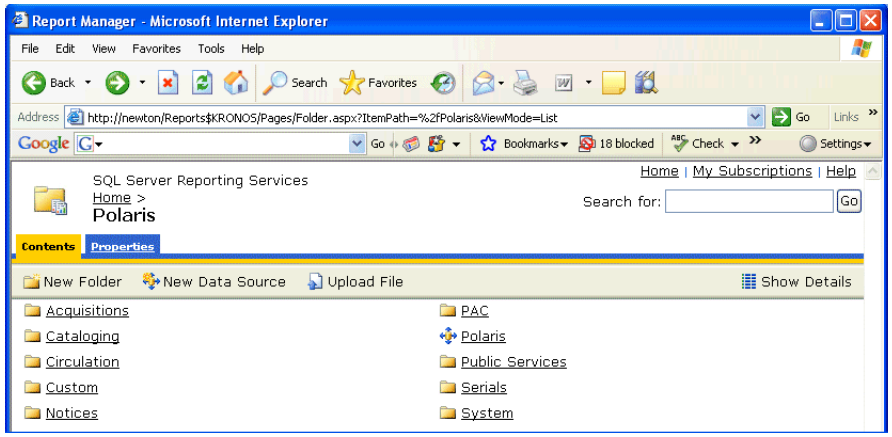
    Example:
    If your reports server is *PolarisServer*, type **http://*PolarisServer*/reports.**

    The Report Manager home page appears.



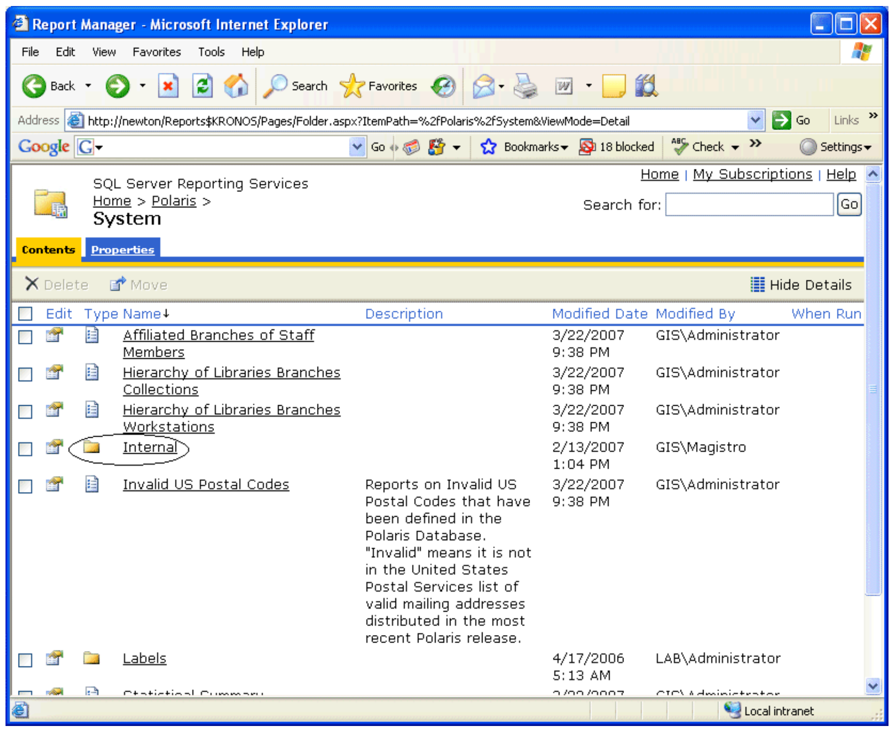
3. Click **Polaris**.

    The Polaris folder appears.



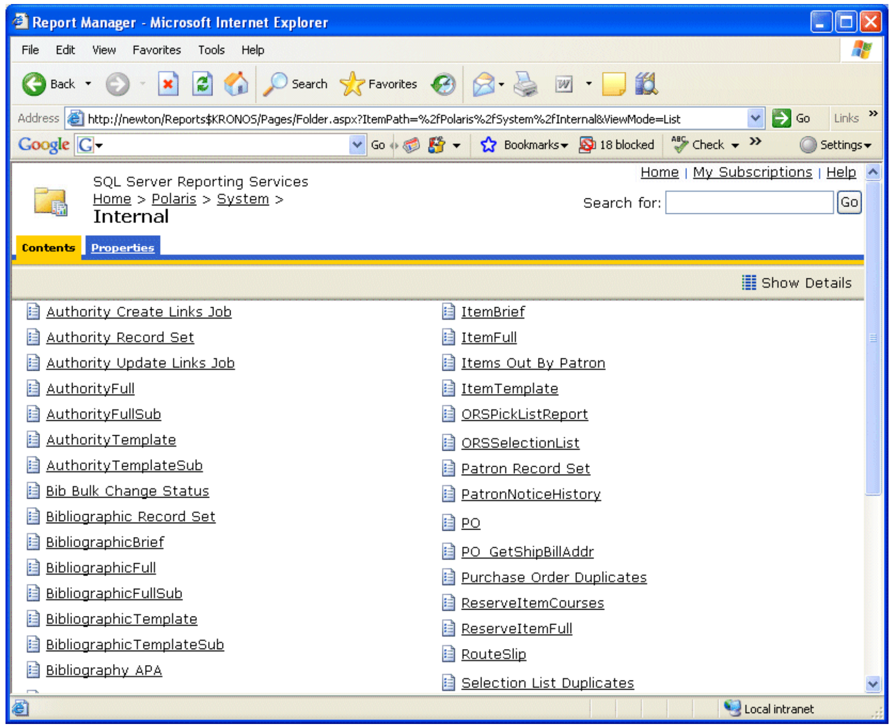
4. Select the **System** folder.

The System folder appears.



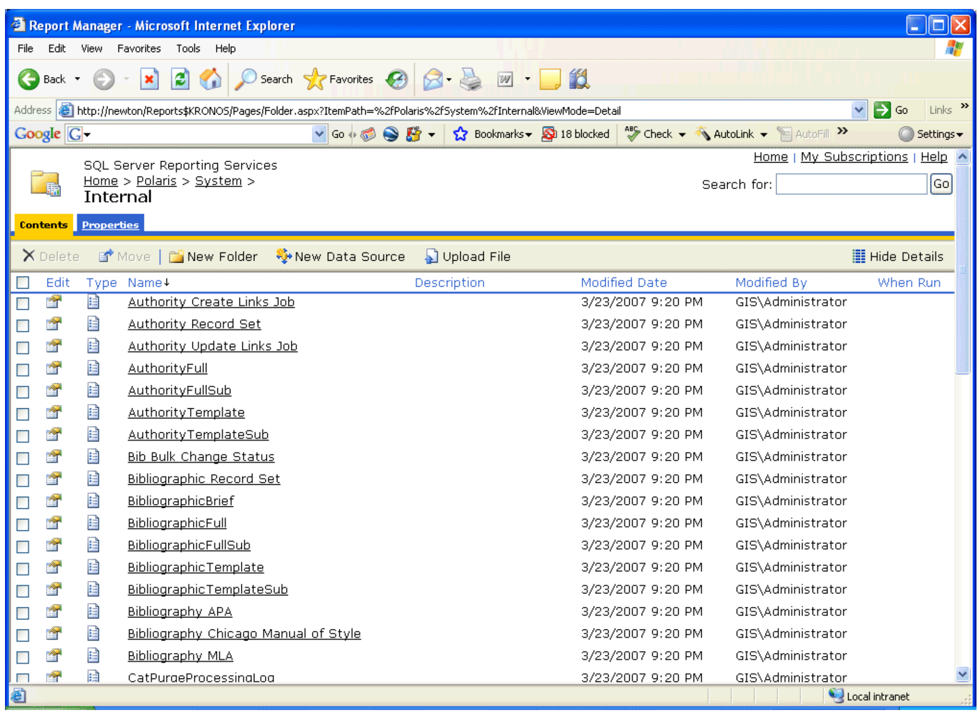
5. Select the **Internal** folder.

The Internal folder appears with a list of the internal reports that you can customize.



6. Click **Show Details**.

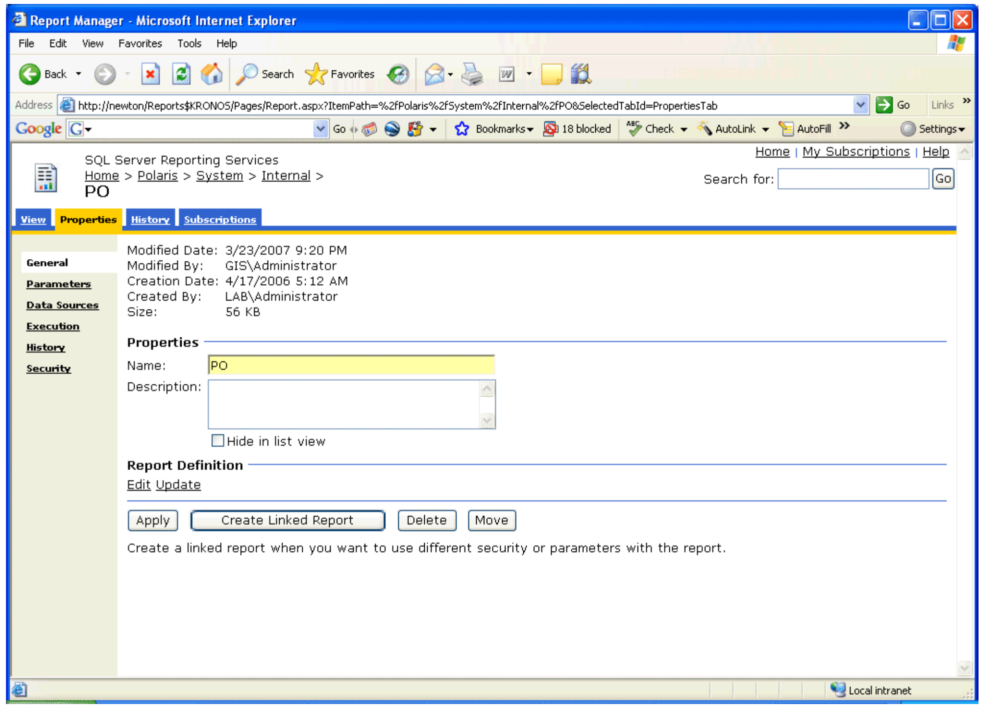
   The details view of the internal reports appears.



7. Select the internal report you want to modify.

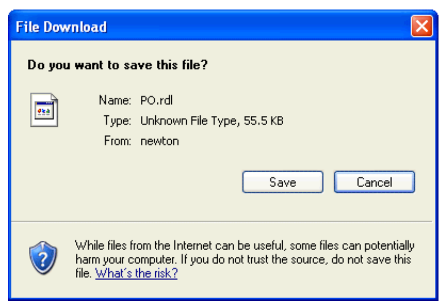
8. Click the Properties button .

   The Properties view appears.



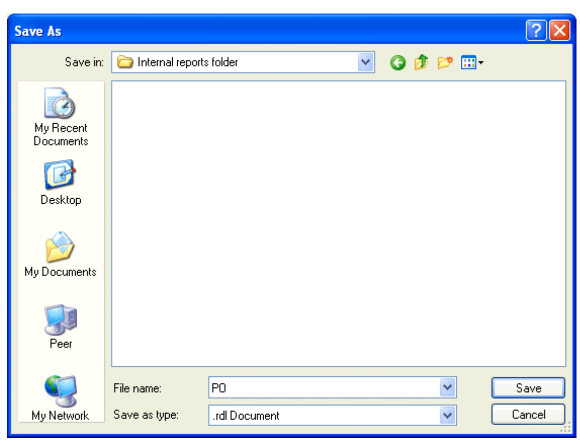
9. Click **Edit**.

   The File Download dialog box appears.



10. Click **Save**.

    The Save As dialog box appears.



11. Click **Save** to save the copy of the report anywhere, for example on your desktop.

Note:
This is just a temporary location until the report is edited and uploaded into Reporting Services.

12. Depending on your SQL version, click **Start** on the desktop, and select **Programs, Visual Studio.NET** or **SQL Business Intelligence Studio.**

    Visual Studio.Net or SQL Business Intelligence Studio opens.

13. Select **New Project**.
14. Select **Business Intelligence Project** in the Project Types list.
15. Set up a new Reports project.

Tip:
Follow the instructions in your Microsoft manual or go to Microsoft's Web site for information on using VisualStudio.NET and customizing reports.

16. Open the project, and add your report to the project.

Note:
This is a copy of the report on your desktop. Delete the version on your desktop to make sure you upload the edited report.

17. Customize the report, and upload it to Reporting Services to the following location:

Note:
If the folder does not exist, click **New folder** and create it: **Polaris/custom/all/system/internal** for system-wide customized internal reports or **Polaris/custom/***branch name***/system/internal** for branch-specific customized internal reports**.**

- To customize the internal report for your entire system, upload it to **Polaris/custom/all/system/internal**
- To customize the internal report for your branch, upload it to **Polaris/custom/***branch name***/system/internal**

18. After the report is uploaded, select **Datasource, Polaris, Shared Data Source**.

Tip:
If the report name includes underscores, replace them with spaces.

19. Click the **Apply** button.

Standard Polaris Reports List

To access Polaris standard reports, select **Utilities** from the Polaris Shortcut Bar. Then select **Reports and Notices** and select the appropriate folder. For more information on generating and printing reports, see "Using Polaris Standard Reports" on page 98.

Note:
The organizations that display in the Report Parameters dialog box depend on the setting in the Staff Client profile **Report Server** in Polaris Administration. See "Specifying Report Servers" in the *Polaris Administration Guide 4.1R2*.

See the following sections for information on reports by type:

- "Acquisitions Reports" on page 112
- "Cataloging Reports" on page 119
- "Circulation Reports" on page 124
- "Outbound Telephony Reports and Trouble-Shooting" on page 135
- "Outreach Services Reports" on page 136
- "PAC Reports" on page 138
- "Public Services Reports" on page 139
- "Serials Reports" on page 145
- "System Reports" on page 147

Acquisitions Reports

To access Acquisitions reports, select **Utilities** from the Polaris Shortcut Bar, and select **Reports and Notices**, **Acquisitions**.

- **Advanced Shipment Container Content** - Lists all items found in a specific package or container for which the supplier has sent an EDI ASN file. Type or scan the 18-digit SSCC tracking barcode in the Report Wizard window. The header shows the date shipped. The report is sorted by title, and it includes the following information: title; author; ISBN or UPC; purchase order number and suffix; purchase order line item ID; and the total quantity sent.
- **Advanced Shipment Containers Not Yet Received -** Lists all items found in a package/container for which the supplier has produced an ASN, but which has not yet been received through the ASN workform. To generate the report, enter the supplier's SAN (with or without hyphens) in the Report Wizard dialog box. The report is grouped by tracking barcode, and sorted by title, then purchase order number. It lists the tracking barcode, PO#/Suffix, Title/Author/ISBN (UPC), PO Line ID, Qty Sent, and the Date Shipped.
- **Advanced Shipment Notification Log** - The Advanced Shipment Notification log displays all titles received via ASN for a supplier and line item status date range. To generate the report, enter the **Supplier SAN** (with or without the hyphen), the **Line item status start date**, the **Line item status end date**, and press **Enter** or click **Submit**. The line item status date is the date the line item's status was updated to **Received** (all segments were received via ASN).

  The report lists purchase order line items that have segments received via ASN within the time period (including the start and end dates) for the specified supplier. It includes the following columns of information sorted by purchase order number, then title, then carton tracking number: **PO # / Suffix; Title / Author / ISBN (UPC); Tracking Barcode; POLI ID; Ord** - Total quantity ordered from the purchase order line items; **Sent** - Total quantity shipped by the supplier; **Rec** - Total quantity of all received purchase order line item segments; **ASN Rec** - Total quantity of purchase order line item segments received using the Receive ASN Shipments workform; **Note** - If the shipped quantity was adjusted, a note appears in this column. The report is printed in landscape page orientation.
- **Average Days On Order by Supplier and Material Type** - Shows how long suppliers take to fulfill orders. For each supplier, it shows the material type, the date ordered, the date received, and the destination library.
- **Average Material Cost by Supplier** - Compare suppliers by the type of material purchased. It shows the average price of invoiced items for each supplier, according to material type.
- **Canceled Titles by Supplier** - Each canceled title is listed with its ISBN/ISSN, quantity, amount (price), purchase order number, and line number.

- **Check In Shelf-Ready Materials** - For each branch listed, the report contains the following information:
  - **Purchase order line item segment receipt information:** Purchase order number and suffix; Title and author; Purchase order line ID number and Segment ID number; Fund; Quantity ordered/ Quantity received
  - **Comments**: If the line item segment was split because fewer copies were received than were ordered, a note appears in this section.
  - **Item check in information:** The date and time that the item was checked in using the Receive Shipment workform; the workstation name where the check in was done; the user name of the staff member doing the check in; item's barcode, title, author, ISBN/ UPC, item ID, assigned branch abbreviation
- **Claims Ready for Cancellation** - Lists items that should be cancelled because the maximum number of claims have been generated, and the item still has not been received. If your library has chosen to automatically cancel items after the claim cycle, the items will not appear on this report.
- **Currency Exchange Rates** - For each library organization selected, the report shows the foreign currency, the exchange rate, the last modified date, and the user who last modified the exchange rate for that organization and foreign currency.

  Note:
  For information on updating the currency exchange rate, see "Update the currency exchange rate for a foreign currency" in the *Polaris Acquisitions Guide 4.1R2*.

- **Electronic Invoice** - Specify the date range and the supplier SAN to see the EDI invoices. For each invoice, the report lists the invoice date, the invoice number, the purchase order number, the currency (if a currency other than the base currency was used), the date shipped, and the library account's SAN ID. Under the invoice information are the details for each purchase order line item, including the purchase order line ID, the ISBN, the title, the quantity, the discount and retail prices, the line item's purchase order number, and the discount percentage.
- **Electronic PO Acknowledgment -** An electronic purchase order acknowledgment (POA) is the supplier's response to an electronic purchase order that the library sent. A Polaris utility scans the supplier's FTP server for acknowledgments and invoices. If a purchase order has been sent and an acknowledgment is on the supplier's server, the utility downloads the file to the *C:\Polaris Reports\EDINew directory* (or another directory your library has specified to store these files). The information in the downloaded file is used to create this report.

  Use this report to identify the status of titles electronically transmitted in a purchase order. The acknowledgment status codes in the report vary according to supplier. You can also refer to the report to manually adjust a purchase order in Polaris to reflect the current status of on-order titles. Each purchase order confirmed in the report begins a new page, and the information on the page is grouped by line item status. The report's page orientation is landscape. To run the report, select a branch (or select All) from the Organization list, enter the start date, end date, and the supplier's SAN without a hyphen. The supplier's SAN is in the Supplier record.

- **Encumbrances and Expenditures by Supplier** - Use this report to inform materials suppliers of how much money has been spent (expenditures) and how much money the library plans to spend (encumbrances) for a fiscal year. The report lists suppliers by SAN, and suppliers that share the same SAN are grouped together and listed in alphabetical order. If no SAN is found in the supplier record, the supplier displays individually on the report. The encumbrances and expenditures amounts are sub-totalled for each supplier account, and then totalled for the supplier group.

  Note:
  If your library supports more than one fiscal year hierarchy for the same collection, the report should be run for each fiscal year hierarchy.

  Suppliers are listed on the report if they are linked to:

  - Purchase order line items for which amounts have been encumbered in funds linked to the selected fiscal year.
  - Invoice line items for which amounts have been expended from funds linked to the selected fiscal year.

  To run the report, select a single branch or all branches (you cannot select multiple branches) under Parameters. The fiscal year records for the selected branch (or all branches) are listed. Then, select a fiscal year from the list, and press **Enter** or click **Submit**.

- **Expenditures by Fund and Material Type** - Use this report to see expenditures grouped by funds (linked to the selected fiscal year) that were used to pay for items (items linked to invoice line item segments).

  To run the report, first select a branch, multiple branches or all branches. If your library's acquisitions tasks are done centrally, select multiple branches or all branches. When multiple branches are selected, the funds are sub-totaled without branch grouping. If your library's acquisitions tasks are done decentrally, select a single branch to see the fund expenditures for that branch. Next, select the fiscal year. Only one fiscal year can be selected for each report. If the branch uses multiple fiscal years, a separate report must be run for each fiscal period.

  Each fund grouping displays the fund's name and alternative name in a heading. Under the fund heading, the report lists the following information in columns from left to right as follows:

  - **Material type** - The material types are sorted alphabetically within the fund group. (This is the item record's current Material Type, not the linked bibliographic record's Type of Material (TOM).) Items are counted unless they have been permanently deleted from the database.
  - **Purchased** - The number of items of each material type that were paid for using the listed fund. The total in the **Purchased** column shows the total number of items of all material types purchased using the listed fund.

    - **Check-Outs** - The number of check out transactions for each material type. The total in the **Check-Outs** column shows the total number of check outs for items of all material types purchased using the listed fund.
    - **Amount paid** - The dollar amount paid for the items by material type. The total in the **Amount paid** column is the total for items of all material types paid for using the listed fund.

- **Expenditures by Material Type and Fund** - Use this report to see expenditures grouped by material type and then sorted by fund within the material type grouping. To run the report, first select a branch, multiple branches or all branches. If your library's acquisitions tasks are done centrally, select multiple branches or all branches. When multiple branches are selected, the funds are sub-totaled without branch grouping. If your library's acquisitions tasks are done decentrally, select a single branch to see the fund expenditures for that branch. Next, select the fiscal year. Only one fiscal year can be selected for each report. If the branch uses multiple fiscal years, a separate report must be run for each fiscal period.

  Each material type grouping displays the material type heading. Under the material type heading, the report lists the following information in columns from left to right as follows:
    - **Fund** - The funds are sorted alphabetically within the material type group.
    - **Purchased** - The number of items of this material type that were paid for using the fund. The total in the **Purchased** column shows the total number of items with this material type paid for by any of the listed funds.
    - **Check-Outs** - The number of check out transactions for each fund. The total in the **Check-Outs** column shows the total number of check outs for items with this material type purchased using any of the listed funds.
    - **Amount paid** - The dollar amount paid for the items by fund. The total in the **Amount paid** column is the total for items with this material type that were paid using any of the listed funds.

- **Fund Hierarchy Report** - Lists the funds for the selected fiscal year in a hierarchical view (similar to the Fund Explorer view) with sub-funds listed under top-level funds. The top of the report displays the fiscal year's total amount budgeted, encumbered, expended, available and the total percentage used. If your library orders centrally, you can select the fiscal year for the central processing organization, and the report will display all the top-level funds linked to the selected fiscal year with the subfunds under them. If your library orders decentrally, you can select the fiscal year for a branch, and all the top-level funds linked to the fiscal year will be listed with their subfunds under them. For each top-level fund listed, the following totals are displayed: **Total Allocated, Total Encumbered, Total Spent, Total Unspent, Unspent = Total Allocated minus Spent.** The totals include all the amounts for the subfunds added together.

- **Fund Summary Report** - Lists the fund activity for the selected fiscal year. The top of the report displays the fiscal year's total amount budgeted, encumbered, expended, available and the total percentage used. If ordering is done centrally, the user selects the fiscal year for the central processing organization, and all the funds linked to the fiscal year are listed. If ordering is done decentrally, the user selects the fiscal year, and the funds are grouped by branch. The funds are listed with the totals for each individual fund.
- **Fund Transaction Comparisons** - Lists any discrepancies between the amount displayed in the fund balances in the Fund workform and amounts that include manual fund adjustments to encumbrances or expenditures.
- **Fund Transaction History** - Lists the entire transaction history for a fund.
- **Funds by Group Name** - Lists the library's fund activity for a specified date range by fund group name. Enter a part or whole fund name, or a portion of a word within a fund name. To see the activity for the current fiscal year, enter the exact start and end dates for the current fiscal year. The fund activity is available only for open fiscal years.
- **Invoice Title, Status and Funds** - Lists funds according to the invoice line item segment status.
- **Items by Approval Plan** - Lists items purchased using approval plans within a specified date range, including the material type, unit price, and number of copies for each title ordered under an approval plan.
- **Items by Blanket Plan** - Lists items purchased using blanket plans within a specified date range. It lists the material type, unit price, and number of copies for each title ordered under a blanket plan.
- **Items by Donor Fund** - Lists items purchased with donor funds within a specified date range, including the material type, unit price, and number of copies for each title ordered under a donor fund.
- **Items Ordered by Deposit Account Fund** - Lists items purchased with deposit account funds within a specified date range, including the material type, unit price, and number of copies for each title ordered under a deposit account fund.
- **List of Funds by Fiscal Year** - Lists the fiscal year and fund hierarchy for each library for all open fiscal years and funds. It includes the total amount allocated; the total currently encumbered and expended; the free balance; and the total amount remaining for each fund listed. The Report Parameters window displays the fiscal years according to the selected Organization(s).
- **List of Suppliers by Owning Branch** - The supplier information includes the supplier SAN (Standard Address Number), library account number, order address, payment address, and claim address.
- **Number of Titles by Supplier** - The number of titles that were ordered from a supplier over a specified period of time.
- **Outstanding Claims by Supplier** - Lists unresolved claims made for titles that were ordered but not received.

- **Outstanding Orders** - Lists purchase orders that are pending or have not been paid. It is useful to run this report to see the outstanding orders before running the Fiscal Year Rollover Utility. For each purchase order listed, the report shows the purchase order number, order type, ordering library, and the total amount of the purchase order. For each title ordered, the report shows the number of copies ordered for each destination/collection.

  To run the report, select the organization for which you want to list the outstanding orders, and select the start and end dates to define a date range. You can limit the report output further by selecting a fiscal year.

Tip:
For more information on generating and printing reports, see "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*.

- **PO Title Status and Fund** - Use this report to see the status of purchase orders. It lists fund encumbrances and disencumbrances, according to the purchase order line item segment statuses (canceled, on order, pending, received) and payment statuses (open, paid, or prepaid). In the Report Wizard dialog box, select the organization, payment status, and purchase order status. Then, specify the payment status start and end dates, and the purchase order status start and end dates.
- **Preliminary Level Bibliographic Records** - Identifies preliminary bibliographic records created in Acquisitions, so these records can be fully cataloged. When bibliographic information is entered in the **Description** fields of a Purchase Order Line Item (either manually or using Titles to Go), a preliminary bibliographic record is created with an encoding level of 5 (partial or preliminary) in the Leader position 17. The report identifies any bibliographic record with Leader position 17=5, and other details like Title, ISBN, and the number of the linked purchase order. The purchase order must have been released for it to appear in this report. If there is invoice data, it is included in the report.
- **Shelf Ready Items Not Received in Acquisitions** - Use this report to see purchase order line items that have not been updated to Received but the linked shelf-ready items have been checked in. The report lists any purchase order line item segment with a status of Pending, Cancelled, Closed, Currently Received or Received that has linked Items with a circulation status other than On-Order. For more information, see "Check in new shelf-ready items" in the *Polaris Patron Services Guide 4.1R2*.
- **Supplier Performance Report**- Use this report to see the number of items ordered and received; the fill rate; and the number of items canceled and claimed. Select the library or branch for which you want to see the supplier data, and select the date range.
- **Uncataloged Titles with Holds** - Use this report to expedite the cataloging of received items that have hold requests. It identifies titles that had no hold requests at the time they were received, but then hold requests were made later on these received items. The report shows the bibliographic record ID number, the title, author, format, received date, and the number of holds. The report is sorted in descending order by the purchase order line item's receipt date (most recent first), then by title in ascending order. An uncataloged title appears in the report if all items linked to the purchase order line item have a status of **In-Process** or **On-Order**, and at least one item has a status of **In-Process.** This status means

that at least one copy of the title in the purchase order line item has been received. Also, the hold requests must have a status of **Active** to appear on the report.

Note:
The Holds Purchase Alert Circulation report is useful in making purchasing decisions because it lists titles that are requested frequently, but have too few items to meet the demand. To generate the report, select the Utilities menu from the Polaris Shortcut Bar. Then select Reports and Notices, Circulation, Holds, Holds Purchase Alert. For more information, see "PAC Reports" on page 138.

Cataloging Reports

To access Cataloging reports, select **Utilities** from the Polaris Shortcut Bar, and select **Reports and Notices, Cataloging**. If your library has a license for Polaris Community Profiles, standard Community reports are available. For more information on Community reports, see "Community Reports & Notice" in the *Polaris Community Profiles Guide 4.1R2*.

Authority Reports

- **Authority Records where 4xx matches 1xx** - Identifies authority records where a *See* reference (4xx field) in one record matches a heading (1xx field) in another record in the database. It also lists situations where the same authority record contains a 1xx and 4xx that match because of normalization. For example, one field contains the heading using "and" while the other field contains the same heading using "&".
- **Authority Records with No Linked Bibs** - Identifies authority records that are not linked to any bibliographic record. They may have links to other authority records.
- **Macros for Authority Records - All Staff Members** - Identifies the macros created by all staff members who work with authority records. For each macro, the report specifies the macro name, shortcut keys, description of the macro's task, creation date, and staff member who added the macro.
- **Macros for Authority Records - Single Staff Member** - Identifies the macros added by a specific staff member who works with authority records. Select the staff member's name. For each macro, the report specifies the macro name, shortcut keys, description of the macro's task, creation date, and staff member who added the macro. Generate this report if you want a printed copy of your macros.
- **Problem Authority Headings** - Identifies possible duplicate authority headings where the normalized text is the heading of more than one authority record. It lists the normalized heading that matched, the authority record IDs, the actual heading text, and the thesaurus of the authority record.
- **Unlinked Authority Records** - Identifies all headings not used by any bibliographic record or as a cross-reference for other headings. You can also create a record set of all unlinked authority records and delete the records or open them from the record set, see "Create a record set of unlinked records" in the *Polaris Cataloging Guide 4.1R2*.

Bibliographic Reports

- **Bibliographic Records No Longer In Database** - Identifies bibliographic records that were purged from the database during a specified period of time. The OCLC Control Number column contains values from the 035 bibliographic tag and the "other system control number" (OCLC control number).
- **Bibliographic Records That Do Not Display in PAC** - Identifies titles that do not display when you search the public catalog. For each of these titles, the **Display in PAC** check box is not selected on the Bibliographic Record workform.
- **Bibliographic Records With No Format -** Identifies bibliographic records without a Type of Material (TOM) code assigned to them. It lists the bibliographic control number, title, and record owner for each bibliographic record that does not have a TOM associated with it. For more information on TOM codes, see "Type of Material Codes (TOMs)" in the *Polaris Cataloging Guide 4.1R2*.
- **Bibliographic Records With No Linked Authority Records** - Identifies bibliographic records that need authority records found or created for them. You can also create a record set of all unlinked authority records and delete the records or open them from the record set. See "Create a record set of unlinked records" in the *Polaris Cataloging Guide 4.1R2*.
- **Bibliographic Records With No Linked Items** - Identifies bibliographic records for which there are no linked item records. Select the bibliographic record modification date range and the organizations. Set the modification start date far in the past and use today's date for the end date so that all bibliographic records without linked items are included in the report.
- **Integrated Ebooks With All Copies Expired** - Identifies ebook bibliographic records where all the linked item records have a status of Withdrawn. In the Report Wizard window, select the vendor account from a drop-down list of all integrated ebook vendors. The report columns display the bib ID, title, author, the number of resource entities, and the name of the vendor account with all copies expired.
- **Macros for Bibliographic Records - All Staff Members** - Identifies the macros create by all staff members who work with bibliographic records. For each macro, the report specifies the macro name, shortcut keys, description of the macro's purpose, creation date, and staff member who added the macro.
- **Macros for Bibliographic Records - Single Staff Member** - Identifies the macros created by a single staff member who works with bibliographic records. Select the staff member's name. For each macro, the report specifies the macro name, shortcut keys, description of the macro's purpose, creation date, and staff member who added the macro. Generate this report to see a printed copy of your macros.
- **New Titles Imported** - Identifies the titles that have been added to your collection during a specified time period.

- **Provisional Bibliographic Records** - Identifies all bibliographic records with a status of provisional. A provisional record is an incomplete record that does not appear in the public catalog and cannot be used at check-out.
- **Subfield 9 utility log** - Identifies records where tags used in automatic processing (to create item records or purchase order/selection list line item segments) were deleted automatically by the $9 Cleanup Utility. On the Parameters tab, select the **Begin date** and **End date**. On the Sorting Options tab, select the sort option, and click the right arrow. The report columns will be sorted in the order in which they appear in the list on the right side of the Sorting Options tab. Then, select **Ascending** or **Descending**, and press **Enter** or click **Submit**.

  For each date listed, the report indicates whether the utility was enabled or not enabled. If the utility did not run that day, **Subfield 9 utility not enabled** appears without any processing information.

  If the utility was run that day, **Subfield 9 utility enabled** appears along with the settings in the profile at the time the utility was run: **Candidate tags will be removed that contain a date earlier than** *(number) (days, months, or years)* **ago**. The following details of the processing are included: start time, end time, number of bibliographic records checked, and the number of tags deleted. See “Setting Utility to Delete Bib Tags Marked with Subfield 9” in the *Polaris Cataloging Guide 4.1R2*.

Community Reports

Standard Community reports are available to libraries with a license for Polaris Community Profiles. For more information on Community and Community reports, see “Community Reports & Notice” in the *Polaris Community Profiles Guide 4.1R2*.

- **New Community Records** - The report shows the community records created after a specified date for a selected branch or for all branches.
- **Updated Community Records** - The report shows the community records updated after a specified date for a selected branch or for all branches.

Item Reports

For Item reports, except for the In-Transit Items report, you can select all organizations, multiple organizations, or a single organization. If you select specific organizations, the report includes item record information only for items owned by the selected organizations.

- **Call Number List** - Item record-level listing of call numbers to be used by catalogers who need to assign call numbers. The report is sorted by classification (ignoring prefix) so you can see the detail of already assigned call numbers and determine where to insert the call number you are constructing.

- **Claimed Items** - Use this report to track missing items that patrons have claimed they returned or never checked out. The Claimed Items report lists all items that have a circulation status of Claim returned or Claim never had, and identifies the last patron known to have borrowed the item.
- **Collection Disposition by Material Type** - You can select the branches to include in the report and group the data by branch or collection. The report shows the number and percentage of items currently on the shelf (or otherwise considered available), items out (unavailable but accounted for), or not accounted for (lost, missing). It shows a sum total for each branch and a grand total for all branches selected. If the report is grouped by collection, it is broken down by collection and shows the totals for each collection for all selected branches. The count is broken out by the material type within the collection.
- **Collection Material Type Analysis** - This report is available from both the Cataloging and Circulation report menus. For the selected organizations, or for the whole library system, the report shows items grouped by collection, with a breakdown of material types within the collection. For each collection/material type combination, the report displays the number of items of each material type in the collection, as well as the percentage of the total number of items in the system that this collection/material type combination represents. At the bottom of each collection group, the report also shows the total number of items of all material types for each collection, and the percentage of the total number of items that this collection represents.

  Note:
  Only final item records are included in the Collection Material Type Analysis reports. Items without barcodes and on-order items are excluded from the report.
- **Collection Value by Organization** - Use this report to list the monetary value of the collections for your organization. Select the organization or organizations for which you want to see the value of each of the collections.
- **In-Transit Items** - Item records with a circulation status of In-Transit or Transferred on a date you select. The items are grouped by the "sent from" branch—the branch listed in the In-Transit/Transferred **From** field on the item record workform. This report can help you identify items that were sent to another library but may be delayed or lost in transit.

Tip:
See "Taking an Item Inventory" in the *Polaris Patron Services Guide 4.1R2*.

- **Inventory Exception - Incorrect Status** - Lists items that had a status other than In during inventory. You specify a call number range and a cut-off date. Set the cut-off date to the day before the inventory date. You can filter the report by organization.
- **Inventory Exception - Misshelved** - Lists items with a status of In that should have been in the inventory sequence but were not. You specify a call number range and a cut-off date. Set the cut-off date to the date you started the inventory. You can filter the report by organization.
- **Inventory Shelflist**- Items inventoried using the Update InventoryDate view on the Check In workform. You specify the call number range to include in the report. Run this report after taking an inventory.

- **Item Records by Funding Source and Stat Code -** This report lists items added within a certain time frame grouped by fund and then by statistical code. You select the organization or organizations, the begin date, and the end date. If your library uses Polaris Acquisitions, the fund used to pay for the items appears next to Funding Source. Under the funding source is the statistical code for the items.
- **Item Records That Do Not Display In PAC** - Use this report to identify items that do not display in the public access catalog. You can select the organizations, collections, and material types for this report.
- **Item Records Without Barcodes** - Use this report to identify items without barcodes for the selected organizations. You can select the organizations, collections, and material types for this report.
- **Item Status** - Use this report to identify the number of items belonging to the selected organizations that have a certain circulation or hold status. The report is not intended to be an inventory of all items on the shelves. The following item statuses are included in this report:
  - Bindery
  - Claim Never Had
  - Claim Returned
  - Held
  - In
  - In-process
  - In-repair
  - In-transit
  - Lost
  - Missing
  - On-order
  - Out
  - Returned - ILL
  - Transferred
  - Unavailable
  - Withdrawn
- **Lost and Missing Items** - Use this report to list all items with a status of **Lost** and all items with a status of **Missing** for the selected organizations. The lost and missing items are listed by assigned branch and the details include the call number, barcode, title, patron's name and phone number, and the last transaction date.

Note:
The Statistical Summary Report under the System folder provides detailed information about activity for the selected organization or organizations. See "System Reports" on page 147.

Circulation Reports

Circulation reports help you track circulation, overdue items, overdue patrons, and delinquent patrons. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Circulation** in the Polaris Reports window.

- **Circulation by Collection Material Type Analysis** - This report shows a count of circulations by material type within each system-defined collection for a time period you designate. It gathers statistics from the transaction file and will include circulated items that have since been deleted. The report counts checkouts and renewals as separate transactions; if an item is checked out multiple times, each checkout is counted. The report also displays the percentage of total items that each collection/material type combination represents. You can filter the report by one or more branches. The branches included are the circulated items' assigned branches.

  Note:
  The Cataloging Item report Collection Material Type Analysis provides the collection/material type information without circulation statistics.

  The Cataloging Item report Collection Disposition by Material Type shows the number and percentage of items currently on the shelf (or otherwise considered available), items out (unavailable but accounted for), or not accounted for (lost, missing).

  For more information about these and other Cataloging reports, see "Outreach Services Reports" on page 136.

- **Circulation by Item's Assigned Branch** - For a specified date range, reports the number of items from the reporting (item) branch that have been checked out and renewed at other branches, as well as the reporting branch. You can see how many items have been shipped from the reporting branch to each loaning branch, and the total circulation for the reporting branch's items. The report is sorted by organization, loaning branch, and item material type. You can filter this report by organization (item's assigned branch).
- **Circulation by Item's Loaning Branch** - For a specified date range, reports the number of items from all the branches that have been checked out and renewed at the reporting (loaning) branch. The report also includes total items and total transactions. The report is sorted by organization, item's assigned branch, and item material type. You can filter this report by organization (loaning branch).
- **Circulation by Postal Code** - For a specified date range and organization, reports checkout transactions by postal code. The results are grouped by branch then country type (USA, Canada, Non-USA/Non-Canada, and No Postal Code). Details include the Postal Code, City, State, Number of Checkouts, Unique Patrons, and Unique Items followed by Totals and Grand Totals.
- **Circulation by Workstation** - For a specified date range, reports the number of items that have been checked out and renewed at specified workstations. The report is sorted by organization, workstation, and item statistical class (item stat code), and includes totals by item stat code, totals for each workstation, and totals for each organization. You

can filter this report by organization (workstation's parent branch). The branch responsible for the checkout is the branch associated with a renewal. The report separates renewals done from PAC and lists them under System.

Note:
The report is based on workstation ID, so if a workstation is reassigned to a new organization the report will include transactions for both the old and new locations. This may also happen if a "floating" staff member at the workstation logs on to one branch, does transactions, then logs on to a different branch from the same workstation.

- **Delinquent Patrons** - Identifies patrons (name, phone, barcode) who have system blocks, free-text blocks, or library-defined blocks on their records. You can filter this report by organization (patron's registered branch).
- **Expired Reserve Items** - Identifies items with a status of On Reserve, but for which the reserve period has expired. You may find this report especially useful at the end of an academic term. After you run the report, you can take the reported items off reserve, pull them from the shelves, and return them to the regular collection or otherwise dispose of them. You can filter this report by organization, and sort it by call number, title, and course name.
- **Fiscal Year Turnover Rate** - This report offers similar information to the Turnover Rate report, but you can specify a fiscal year and that year's starting month. The report then compares that year's turnover rate information with the current year's statistics.

  Important:
  Because this report gathers up to two years of data, it may take several minutes to complete.
- **Floating Items by Home Branch** -A statistical report that counts how many items from the home branch have floated to other branches. You can select one or more home branches and set a date range. The report includes the following information:
  - **Home branch**
  - **Date range**
  - **Collection** - Listed if an item from that collection has floated; includes the total number of items from that collection that have floated.
  - **Material type** - Listed if an item of that material type has floated; includes the number of items of that material type that have floated.
  - **Float to branches** - Lists each branch that items have floated to and the number of unique items that have floated to that branch. (The same item may float to a branch more than one time; the report counts an item only once.) If the same item floats to more than one branch, it is counted once for each branch.
  - **Total number of items that have floated** - Unique items only. The same item may float to different branches or float and return. It is counted only once.

- **Floating Items by Assigned Branch** - A statistical report that counts how many items from other branches have been checked into the receiving branch. You can select one or more receiving branches and set a date range. The printed report includes the following information:
  - **Receiving branch**
  - **Date range**
  - **Collection** - Listed if an item has been received into that collection; includes the total number of items that have been received into the collection.
  - **Material type** - Listed for any floating items that have been received; includes the number of items of that material type that have been received.
  - **Previous branch** (the last assigned branch of an item) - Lists each branch and the number of items received from that branch.
  - **Home branch** - Lists each home branch and the number of items received from that branch.
  - **Total number of items received** - The number of unique items. If a particular item floated out to another branch and then floated back at a later time, the item is counted only once.
- **Floating Items Setup** - A summary report for the home branch showing the branch's floating settings. You can select one or more branches. If a branch has not enabled floating collections but has defined values, the report prints the values. If a branch has not enabled floating collections and has not defined any values (collections, material types and so forth) the report is blank. This report includes the following information for each selected home branch:
  - All collections selected for floating
  - All material types selected for floating
  - All branches selected for receiving
  - On-shelf item limit for receiving branches
  - Total item limit for receiving branches
  - No matching collection allowed (yes/no)
  - Blank collection allowed (yes/no)
  - Floating enabled (yes/no)
- **Hourly Circulation Report** - Counts in-library check-out and renewal transactions for a selected date range by day of the week and by hour. (Renewals from Polaris PowerPAC and Mobile PAC are not included.) You select one, several, or all branches in the system and specify a date range. The report will include transactions from the beginning of the first day through and including the end of the final day. The report is divided into sections by selected branch, and sorted within each branch section by day, then by hour; a grand total for all selected branches is included. Report output columns include:
  - **Day of week and hour of day** - The report breaks out each hour of the day in which transactions occurred starting from 12:00 a.m. It repeats each day with an hourly unit during which transactions

occurred. The report lists only the hours with transactions. If no circulation transactions occurred for an hourly period, that period does not appear in the report; if no circulation transactions occurred for an entire day, that day is listed in a single line with 0 total check-outs.

- **Total circulation** - Total transactions for each branch.

- **In-House Use** - Reports the number of items used in a specified organization, sorted by material type. These counts are taken from the Year-to-date in-house usage counter and Lifetime in-house usage counter in the item records. The Year-to-date counter is a count of everything checked in, through InHouse mode, since the last time the site did an item record fiscal year-end rollover. The Lifetime counter is a continuous counter. Both counters follow the site's year-end rollover schedule.
- **Item Circulation by Collection** - For a specified date range, reports the number of items by collection that have been circulated, the number of check-out transactions, and the number of renewal transactions. The report is sorted by organization (item's assigned branch) and collection. You can filter this report by organization.

  Note:
  This report includes on-the-fly and QuickCirc items. A similar report, constructed in Polaris SimplyReports, also includes these ephemeral items in the count but does not assign them a collection code.
- **Item Circulation by Item Statistical Code** - For a specified date range, reports the number of items by statistical code that have been circulated, the number of check-out transactions, and the number of renewal transactions. Check-out transactions include those made in the staff client, offline/bookmobile, Polaris ExpressCheck, and SIP self-check. Renewals include these sources as well as renewals from PAC. The report is sorted by organization and statistical code. You can filter this report by organization.
- **Item Circulation Statistics** - For a specified date range, reports the number of items by material type that have been circulated, the number of check-out transactions, and the number of renewal transactions. The report is sorted by organization and material type. You can filter this report by organization.
- **Long Overdue Items** - Lists items that are currently long overdue; includes assigned branch, call number, title, item barcode, check-out date, due date, date of last notice, patron, and patron barcode for each item. The report is sorted by organization and call number. You can filter this report by organization.
- **Overdue Items** - Lists items that are currently overdue and long overdue; includes assigned branch, call number, title (with issue designation for serials), item barcode, due date, patron and patron's branch, and patron's telephone number for each item. This report helps you confirm that the reported items are not on the shelf before sending overdue notices. The report is sorted by organization and call number. You can filter this report by organization.

- **Overdue Patrons** - Identifies patrons *from the reporting library* who currently have overdue or long overdue items, including detailed information about the patron and the items. The report is sorted by organization and patron name. You can filter this report by organization.

  Note:
  The Overdue Items report identifies patrons from other libraries who have overdue items.

- **Overdue Reserve Items** - Lists reserve items with a status of On Reserve or Permanent Reserve that are checked out and overdue. You can use this report to contact patrons with overdue reserve items. It includes the title, material type and barcode, due date, course, and the borrowing patron's telephone number and registered branch. You can filter the report by reserve item branch, and sort it by branch, call number, course name, due date, or title.

- **Patron Circulation Statistics** - For a specified date range, reports the number of circulation transactions (check-outs and renewals), according to patron code. This report measures circulation activity, *not* the number of items circulated. The report is sorted by branch name, in alphabetical order. You can filter this report by organization.

- **Patron Code Statistics** - For a specified date range, reports the number of patrons that have done check-outs and renewals, according to patron code and statistical class code. The report is sorted by organization, patron code, and statistical class. You can filter this report by organization.

- **Patron Cross Borrowing** - For a specified date range, reports the number of borrowers by patron code who were registered at a library other than the transacting library; includes the number of circulation transactions (check-outs and renewals) done by each patron. The report is sorted by organization (transacting library), patron library, and the number of circulation transactions (highest to lowest). You can filter the report by organization (transacting library).

- **Patron Lost Items by Owning Branch** - Lists lost items assigned to a specific branch, broken down by the registered branches of the patrons who lost the items. You can set a date range and filter the report by organization. To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Circulation** in the Polaris Reports dialog box.

- **Receipt Delivery Failure** - Lists the patron barcode, patron name, carrier name, delivery address, subject, and failure date for receipts that failed to be delivered to patrons.

- **Remove Patron ID Report** - When you enable patron ID purging, you can run a report to track the number of patron IDs purged during a time period you specify. Select **Utilities, Reports and Notices** from the Polaris Shortcut bar, select **Circulation** in the Polaris Reports dialog box, and double-click **Remove Patron ID from circ transactions process log.** You set transaction start and end date parameters for this report. The report includes Organization (transacting organization), Transaction Start Date (starting date of the purged transactions), Transaction End Date (ending date of the purged transactions), a count of the patron IDs removed from transactions for the specified period, a count of the patron IDs removed from item record histories for the specified period, and total IDs removed. (If the same patron ID occurs more than once in an item record history, each occurrence is counted.)

- **Reserve Item Records** - Lists all reserve item records by assigned branch, regardless of the reserve status; includes call number, barcode, title, material type, course information, reserve start/end date, and reserve status. You can filter this report by organization, and sort it by reserve status, title, call number, and course name.
- **Reserve Shelf List** - Lists reserve items currently on reserve (status of On Reserve or Permanent Reserve). You can use this report as a shelf list to check all items that should be currently reserved at the library. The report includes the circulation status of each item, as well as other item and course information. You can filter this report by organization, and sort it by call number, title, and course name. If an item is on reserve for more than one course, the report lists the item more than once.**Tip:** You can send the Reserve Statistics by Course report as a notice to the primary and alternate instructors linked to the active courses. See “Sending Course Reserve Notices” in the *Polaris Patron Services Guide 4.1R2*.
- **Reserve Statistics by Course** - Lists reserve items currently on reserve (status of On Reserve or Permanent Reserve) for a course with a status of Active, and the number of times each item has been checked out. For example, this report is useful if an instructor asks whether items on reserve for a particular course are circulating. You run the report for a selected course/section number or multiple course/section numbers at a particular branch. Items that circulate while on reserve also increment the year-to-date circulation counter in the primary item record. Reserve circulations are included in the standard circulation statistical reports.

  Note:
  The turnover rate is the number of items circulated divided by the total number of items owned. Two reports calculate turnover rate by collection or item statistical code, for a selected branch or multiple branches. These reports can help you determine, for example, how heavily a collection is used in relation to the size of the collection:

- **Top Circulating Titles by Collection** - Lists the top circulated titles, organized by selected branch and collection, for a specified date range. You select one, several, or all branches in the system and specify a date range, collection, and number of titles to show. The branches are items’ assigned branches. The report will count check-out and renewal transactions for the date range from the beginning of the first day through and including the end of the final day. The report is divided in to sections by items’ assigned branch, and sorted within each branch section by collection name and then by titles according to circulation count (high to low). The columns include the following information:
  - **Collection**
  - **Titles within collection**
  - **Count of circulations for each title** - Each checkout and each renewal is counted for each title regardless of check-out branch or patron’s branch. The titles with the highest circulation numbers

appear in the report. If there are fewer than the specified number of circulated titles in a collection, the reports lists all the titles that have circulation counts. If some titles have the same count, the report lists each, up to the specified number of titles. If a collection has no circulating titles, it is not listed in the report.

- **Turnover Rate** - This report counts all item check-out and renewals where the item's assigned branch matches a selected branch or branches and the transaction date is within the selected date range. You specify whether to report by collection (the default) or by item statistical code. For each selected branch, the report lists each collection or item statistical code that has had circulation, the total items in the collection or statistical code, the number of circulations for each collection or statistical code, and the corresponding turnover rate (circulated items/ total items) expressed as a decimal figure, and the totals of these figures for each branch. If the report includes more than one branch, combined totals for the selected branches are also included.

  Notes:

  The item count is based on the number of items in the assigned branch's holdings on the date the report is run.

  Check-out and renewal transactions are counted without regard to the transacting patron. That is, if the same patron checks out the same item 12 times, 12 transactions are counted.

  The patron's registered branch is not considered in any way.

  If an item is put in transit to fill a hold at another branch and is checked out from that branch, the transaction is counted.

- **Uncirculated Items** - Identifies items with little or no circulation since their creation date, to help you remove them from the collection. You specify the item record creation date and circulation thresholds. The report lists all items created before the specified date with a record status of Final that have the specified number or fewer circulations. The default number is 0; that is, no circulations. The report includes the total number of circulations and the last circulation date for reference, and is sorted by organization and call number. You can filter this report by organization.

- **Statistical Summary** - To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **System** in the Polaris Reports dialog box. See "System Reports" on page 147.

Holds Processing Reports

Reports related to holds are part of the regular holds processing workflow. They identify a branch's hold requests to fill, requests awaiting pickup, unclaimed requests, titles that have a high volume of holds, expired requests, and other useful information. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Circulation, Holds** in the Polaris Reports dialog box.

- **Expired Requests** - Lists expired requests with item and patron information. You can filter this report by organization.

- **Held Checklist** - Lists the held items that are awaiting pickup by patrons; includes item and patron information, sorted by organization and call number. You may find it useful to run this report daily. You can filter this report by organization.
- **Holds alert reports** - These reports list titles where the number of Active and Pending requests is equal to or greater than a selected number of requests, and count the number of items linked to those titles that might fill the requests. The linked items count includes items with a Final record status, and any circulation status except Claim Never Had, Claim Returned, Lost, Missing, Withdrawn, or Unavailable. You can select a pickup branch or branches to filter the **Holds alert report by branch**. You can select a library or libraries to filter the **Holds alert report by library**; in this case, the report includes requests where the pickup branch belongs to one of the selected libraries. Report output columns include the bib record ID, title, author, type of material (format), ISBN, local holds count, local items count, system holds count, and system items count.

  Note:
  These reports are based on current holds data (all current Active and Pending requests), not transaction data. They do not report the number of requests that have been placed in the past, only the requests that are in the system when the reports are run.

- **Holds Purchase Alert** - Lists bibliographic records with hold requests on them, the number of requests, and the number of items that can fill the request. This report provides the library with an indication of which titles are most frequently requested and have too few items to meet the demand, and is useful for making purchasing decisions. Using the report parameters, you can do the following:
  - Set the levels for the number of holds on a bibliographic record and the number of items attached to a bibliographic record in the report. The report returns results based on the ratio of number of holds to number of items.
  - Include or exclude items that are not holdable (Lost, Missing, Withdrawn, Unavailable and non-holdable) by selecting **Yes** or **No** next to **Include non-holdable items**. The default is **No** - no non-holdable items will be included.
  - Filter the report by TOM by selecting one or multiple TOM filters. When TOM filters have been applied, only bibliographic records with the selected primary TOMs are included. For example, if you want to see Blu ray discs for which there are at least 10 holds and only 1 item, enter **10** in the **Number of Holds** box and **1** in the **Number of Items** box, and select **Blu ray Disc** in the **Type of Material** box.
  - Group the report by TOM, or leave it ungrouped.

  Note:
  The report includes the UPC code (if any) for bibliographic records with no ISBN to help you track non-print records.

- **Hold Requests To Fill** - The RTF report, an essential part of the daily holds routing process. This report identifies pending hold requests currently in the request routing sequence. You can sort the report by call number, collection, format, and title, and filter it by organization. You use this report to view items at your library with a status of In that could fill the requests. For each request, check in and send the item to the pick-up branch, or deny the request. See “Daily Request Processing” in the *Polaris Patron Services Guide 4.1R2*.

> **Note:**
> You can also print the Hold Requests To Fill report from the Request Manager workform (**File, Print Hold to Fill**). However, you cannot sort information. See “Fill hold requests for Requests-To-Fill” in the *Polaris Patron Services Guide 4.1R2*.

- **Holds Fiscal Year Analysis** - Shows the system-wide number of patron-placed hold requests per month, staff-placed hold requests per month, total hold requests for the year to date, and total hold requests filled, beginning with today’s date and going back to the month you specify. The report also includes the percentage of increase or decrease for each category compared to the same month in the previous year, and shows the grand totals for successive past years as available data permits. The report gathers the data from the holds transaction files. For reporting purposes, hold requests “placed” includes all requests that acquired a status of Inactive, Active, or Pending. Reactivated requests are not counted.
- **Local Hold Request and Item Counts by Branch** - Lists Active and Pending requests for each branch where the branch is the pick-up library. The **Number of Local Holds** column shows the requests. The **Number of Local Copies** column shows the number of items owned by the branch, including items with a status of In, Out, Held, Transferred, In Transit, On Order, In Repair, and In Process. Items designated as Not Holdable are also included in the count. This column lists **0** for a title if the pickup branch does not own any eligible items, or if the title does not have any linked items. You can filter this report by organization.
- **Pending Holds Count** - Counts pending requests per day for a selected pick-up branch or branches, and can help you gauge the amount of staff time spent on finding and pulling items that fill requests. You specify a date range and select an organization or organizations (the pick-up branches for the hold requests). The report lists all the holds requests that changed to a status of Pending during the selected date range for the selected pick-up libraries. If the same request went Pending more than once during the specified time period, it is counted only once. The report is organized by branch and lists one line per day during the time period with the total number of pending requests for that day. If the count for a day is 0, that day is not listed. For example, a selected date range of 30 days could include up to 30 lines for a branch, with a count of requests for each day. The reports also includes the total number of requests for each selected branch and the grand total for all selected branches.
- **Request Time to Fill** - Shows how many days it took to fill hold requests during a specified time period, from the date the request was placed to the date the item was placed on the hold shelf. The report is organized in 10-day increment columns. That is, you see how many requests were filled in 10 days or less, how many were filled in 11-20 days, and so forth. A percentage of the total requests filled is also provided for each 10-day increment, as well as an overall average days-to-fill figure. (Note

that the percentages for each 10-day column may not total exactly 100% due to rounding.) The report is grouped by pick-up branch, and you can filter the report by pick-up branch.

Note:
The report does not include requests that took more than two years to fill.

- **Unclaimed Checklist** - Lists unclaimed requests with item and patron information. You can filter this report by organization.

Note:
To access the Statistical Summary report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **System.** See "System Reports" on page 147.

Interlibrary Loan Reports

Interlibrary loan reports help you notify patrons when their ILL items have arrived, and track ILL statistics. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **ILL** in the Polaris Reports dialog box.

- **ILL Held Items** - Lists all the held items obtained through interlibrary loan that are awaiting pickup by patrons; includes information about the items and patrons. You may find it useful to run this report daily, so you can contact the patrons waiting for the items. The report is sorted by organization (pick-up library) and ILL Request ID number. You can filter the report by organization (pick-up library).
- **ILL Request Statistics** - For a specified date range, identifies how many interlibrary loan requests have been created for each patron code. The report is sorted by organization (pick-up library) and patron code. You can filter the report by organization (pick-up library).
- **ILL Request Statistics by Workstation** - Tracks how many interlibrary loan requests were placed at each workstation during a specified time period. The report is sorted by organization (pick-up library) and workstation. You can filter the report by pick-up organization.

Borrow by Mail Reports

The following reports help you track Borrow by Mail requests. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Patron Services, Borrow by Mail** in the Polaris Reports dialog box.

- **Borrow by Mail Circulation Summary** - A summary of Borrow by Mail circulation (number of check-outs), including material type, the number of items checked out, the number of patrons transacting, and the total number of check-out transactions. Each patron is counted once, regardless of the number of items checked out to that patron, and renewals are not included. You can filter the report by organization (all branches designated as Borrow by Mail processing centers) and specify a date range.

- **Borrow by Mail Holds Summary** - A summary of Borrow by Mail requests, including the number of requests created, requests filled (requests become held), requests checked out, requests unclaimed, and requests cancelled. You can filter the report by pickup organization (processing center) and specify a date range.

Floating Collections Reports

The following reports help you manage floating collections. To access these reports, select **Utilities, Reports and Notices, Circulation**.

Run these reports immediately after the inventory:

- **Inventory Exception Incorrect Status** - Lists items that had a status other than In during inventory. You specify a call number range and a cut-off date. Set the cut-off date to the day before the inventory date. You can filter the report by organization.
- **Inventory Exception Misshelved** - Lists items with a status of In that should have been in the inventory sequence but were not. You specify a call number range and a cut-off date. Set the cut-off date to the date you started the inventory. You can filter the report by organization.

Outbound Telephony Reports and Trouble-Shooting

Polaris provides the following reports to help you trouble-shoot problems with Telephony. Select **Utilities, Reports and Notices, Notices** to access these reports:

- **Telephony Delivery Failure Report** - Lists failed telephone notices with their failure reasons. You can filter this report by date and reporting branch. It includes the patron's barcode, patron's branch, patron's name and telephone number, the failure reason, and the failure date.
- **Telephony Summary Report** - Summarizes the number of calls made for each notice with their statuses, including failure reasons, in a specified date range. The report is organized by patron branch.

Important:
Inspect this report regularly. In this report, Unknown connection type indicates that a busy signal was received. A sudden spike in the number of busy signals received may indicate telephony board problems.

Outreach Services Reports

The following reports can help you organize and track outreach services processing. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Outreach Services** in the Polaris Reports dialog box.

Pick List Reports

Outreach Services Pick List by Date of Next Service - After you generate pick lists for your outreach services patrons, this report lists detailed item information for each patron due for outreach services deliveries within a specified time period. You can filter the report by patron's branch and date range, and sort it by a number of fields, such as title, call number, patron name, delivery mode and route.

Outreach Services Pick List by Delivery Option - This report lists detailed item information for each patron due for outreach services deliveries by a specified delivery option. You can filter the report by patron's branch and delivery option, and sort it by a number of fields.

Outreach Services Pick List by Route - This report lists detailed item information for each patron due for outreach services deliveries on a specified delivery route. You can filter the report by patron's branch and delivery route, and sort it by a number of fields.

Usage Reports

All ORS Patrons - This report lists all enabled ORS patrons (active and inactive), grouped by branch. It includes the patron's name, ORS status, notes, last service date, next delivery date, route, and mode of delivery. You can filter the report by patron's branch.

Item Circulation Statistics for ORS - This report shows the number of items checked out to ORS patrons within a specified time period. Items are grouped by material type and organization. The report includes the number of items by material type, checkouts, renewals, and total transactions. You can filter the report by branch.

Patron Circulation Statistics for ORS - This report lists the number of items checked out and renewed to ORS patrons, grouped by patron code, within a specified time period. You can filter the report by branch.

Reader Ratings Reports

Note:
Rating average calculations do not include titles with a rating of 0.

ORS Rated titles - This report includes titles where the title appears on a reading history linked to an ORS patron, the patron's registered branch is a selected branch, the title has an average rating that matches the selected ratings, and at least one item attached to the title appears in the selected patron reading histories and has a rating date within the selected range. You can filter the report by branches, ratings, and rating date range, and opt to combine branch totals or report each branch separately. The report lists title, author, format (bibliographic format), patrons (the number of patron records where the title appears), number of ratings, average rating, total number of items for the branch, total number of patrons for the branch, and grand totals for items and patrons when multiple branches are selected.

Note:
You can sort this report by author, format, number of ratings, or title. You must select a sort option to run the report.

ORS Rated titles by patron - This report includes all titles where the patron is an ORS patron, the patron's registered branch is a selected branch, the title has an average rating that matches the selected ratings, and at least one item attached to the title appears in the selected patron reading histories and has a rating date within the selected range. You can filter the report by branches, ratings, and rating date range. The report lists patron name, titles grouped alphabetically by rating, author, format, number of ratings, and average rating.

Note:
You can sort this report by format, patron name, or title. You must select a sort option to run the report.

ORS titles not rated - This report shows the number of titles with no rating checked out to ORS patrons for a specified date range. You can filter the report by patron's registered branch, and sort it by author, format, title, or total check-outs.

Note:
You must select a sort option to run the report.

PAC Reports

To access PAC reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **PAC** in the Polaris Reports dialog box.

E-Source Reports

The **E-Source** report lists the subscription databases you have set up for searching from the PAC e-sources page, organized by branch. Information about each e-source includes the name, description, connection URL, message, categories/subcategories, restriction data, and connection data. You can filter the report by organization. For the purposes of custom reports, you can choose to log the transaction when a patron accesses an e-source target:

- **Transaction** - E-Source Access
- **Transaction code** - 2201
- **Transaction subtypes**
  - 239 - Remote User flag
  - 240 - Selected Language ID
  - 241 - Name of e-source selected to view
  - 7 - Patron Code (if patron logged on)
  - 123 - Patron Assigned Branch (if patron logged on)
  - 33 - Patron Statistical Code (if patron logged on)

For information about logging transactions, see "Collecting Transaction Statistics" in the *Polaris Administration Guide 4.1R2*.

Public Services Reports

To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Patron Services**.

Patron Services Reports

The following reports can help you gather statistics about the patrons registered in your system and at specific branches.

- **Associated Patron Groups Report** - Lists all patron records that are linked in associations (whether or not these are blocking relationships). You can select one, many, or all patron registration branches. The report lists all patron records from the selected branches that have one or more associated patron records, and lists the associated records for each patron. Each patron's full name, patron code, and barcode is included. Patrons are listed in alphabetic order by last name.
- **Expired Patrons** - Lists information about patrons whose registration has expired before a specified date. The report is sorted by organization and expiration date. You can filter this report by organization.
- **Inactive Patrons** - Lists information about patrons registered during a specified date range whose accounts show no activity since the end date of the range. The report includes the patron's last activity date. The report is sorted by organization, last activity date, and patron name. You can filter this report by organization. The Last Activity Date field in the patron record is updated in these circumstances:
  - **Staff client** - Item check-out; renewal; quick-circ item check-out; when a claim is made on an item
  - **PAC** - Log-in to patron account; placing and modifying hold and ILL requests; online renewal; patron information updates; payments; access to remote databases that require log-in
  - **Polaris ExpressCheck, SIP self-check units** - Check-out and renewal; patron account access; payments
  - **Time and print management applications** - Log-in
  - **Inbound telephony** - Account information access; item renewal
- **Patron Library Assigned Blocks** - Lists patron records with library-assigned blocks. You can select one, many, or all organizations, and select one, many, or all library-assigned blocks. The list of block available for selection depends on the organizations you have selected. The report lists currently blocked patron records according to your selections, and totals the number of unique patrons. That is, if a patron has more than one block, that patron is counted only once for the total.
- **Patron Register** - Reports the total number of patrons, by patron code, who were registered during a specified time period. The report is sorted by organization and patron code. You can filter this report by organization.

- **Patrons Registered by Zip Code** - Reports the total number of patrons who were registered, according to postal code, during a specified time period. The report is sorted by organization and Zip code. You can filter this report by organization.
- **Patrons Without Addresses** - Identifies and lists information about patrons registered before a specified date whose accounts do not include an address. The report is sorted by organization and patron name. You can filter this report by organization.
- **Patrons with Messages Report** - This report provides a snapshot of read and unread messages currently in patron accounts where the patron's registered branch matches the selected branch or branches and where the patron record has at least one message, read or unread. The report includes patron names, message text, whether the message is read, the date the message was created, and the creator.
- **Verify Patron Data** - Lists patrons who are currently blocked because they have self-registered or they have made account changes through the PAC. The report is sorted by organization and patron name. You can filter this report by organization.
- **Statistical Summary** - To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **System**. See "System Reports" on page 147.

Patron Financial Reports

To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Patron Financial** in the Polaris Reports dialog box. The following reports can assist you in processing and evaluating patron financial transactions:

> **Note:**
> For information on reports regarding patron credit card payments, see "E-Commerce Credit Card Reports" on page 143.

- **Billed Patrons** - Identifies patrons who have received a billing notice. The report includes basic item information and the amount owed by each patron, sorted by organization name and patron name. You can filter the report by organization.
- **Collection Agency Detail** - Reports all patron accounts submitted to collection that show account activity within a specified date range. It shows who has been reported during that time period, even though a patron's standing with regard to the collection agency may have changed after that time period. You can also run it for a time period ending at the current date to get a picture of any patron's current standing with regard to the collection agency. The report lists details of the account activity for each patron, grouped by organization. Organizations and amounts are based on the library's settings for reporting level (system, library, or branch) and reporting branch (item's branch, patron's branch, or loaning branch) set in Polaris Administration. See "Set up collection agency processing" in the *Polaris Patron Services Administration Guide 4.1R2*.

Examples:

Reporting level is Branch - Patrons with activity based on reporting branch (by patron's branch, item's branch, or loaning branch). That is, if the reporting branch is loaning branch, then a report for the branch will include all patrons reported because they checked the item out at the branch.

Reporting level is **Library** - Patrons who have had activity based on reporting branch (by patron's branch, item's branch, or loaning branch). That is, if the reporting branch is loaning branch, then a report for Library will include all patrons reported on behalf of the Library's associated branches because they checked the items out at those branches.

Reporting level is **System** - Patrons with activity during the specified period, regardless of how they were reported (by patron's branch, item's branch, or loaning branch).

- **Collection Agency Summary** - Identifies all patrons who have been reported to a collection agency and the amounts they owe, grouped by organization.
- **Daily Cash Drawer** - Reports the financial transactions completed on a workstation, including the time of each transaction and the operator. The report includes totals for each type of transaction (Payment, Charge, and Waive), totals for all cash taken in and paid out, and the net balance for the specified time period. You may want to coordinate this report with the times that various staff members use a particular workstation for patron accounting transactions.
- **Donations - Credit Card Payments** - PayPal® Payflow Pro®, Payflow Link, or Comprise™ SmartPAY™ . Lists donation payments, including details such as the amount, the purpose, whether the donor wants a printed acknowledgement and, if so, the donor's address; includes credits and voided transactions. You can filter this report by a date range and by organization. The report includes subtotals by organization. The organization is the branch the donor has designated to receive the gift. Use this report to distribute donations to the appropriate organizations. Run the report at the system level to view voided transactions.

Note:

Printed acknowledgements are not automatically generated. Using the information on the report, you can create and send your own acknowledgements.

Note:

The **Donations - Credit Card Payments** report records payments made through Payflow Link, but do not reflect credit or void transactions.

- **Financial Transaction Summary by Fee Reason -** Reports patron financial transactions, organized by transaction (fee) reason, for a selected transaction date range. You can select one, many, or all branches (transacting organizations). If the transaction is a payment, waive, or refund, the transaction is included even if the initial charge was prior to the date range. You can also choose to include or exclude credit card transactions. The detail section of the report lists transactions grouped by transaction reason (such as overdue item) and the total payments for that reason. Transaction details include the date, amount, payment method, operator, and patron barcode, and are sorted by transaction date/time. The summary section of the report lists the totals for all branches included in the report, with the total amounts for each transaction reason.A separate summary reports the total of all debit transactions. These include refunds from payments, refunds from deposits, and credits from deposits. (Individual debit transactions are not included in the report detail.) A separate summary for waive transactions is also included. The following patron financial transactions are included:

- **Charges** - A charge may be created manually by staff, created automatically by a process such as an overdue or hold request, or created by a third-party device.
- **Payments** - A payment may be made by staff in the staff client, by the patron from PAC, or via a third-party device.
- **Waives** - Waives may be created manually, or automatically when a lost item is returned. A total of all waives is included in a separate summary at the end of the report, but individual waive transactions are not included in the detail section of the report.
- **Refunds** - Cash or check refunds. These are summarized at the end of the report but are not included in the detail section of the report.
- **Credits** - Amounts are credited to a patron account under certain circumstances, such as when a lost and paid for item is recovered. Staff members with appropriate permission can manually create a credit.

Note:
Deposits and deposit returns are not included in the reported patron financial transactions.

- **Financial Transaction Summary by Payment Type** - This report is similar to the Financial Transaction Summary by Fee Reason report, but lists only payment transactions. All payment methods are included. The detail section of the report lists the transaction date, transaction reason, item barcode and title if applicable, operator, workstation, patron barcode, and amount. This section is grouped by payment method and sorted by transaction date/time. The summary section of the report includes the total for each payment method, the total for all payment methods per branch, and grand totals for all selected branches.
- **Fines and Fees** - Lists fines and fees transactions according to transaction type (such as payments, waives, refunds, and charges), during a specified time period. The report provides detailed information on each transaction, including the transaction date, reason, and amount; the item barcode and title; the computer workstation and operator; the patron barcode; and totals for each transaction type and library. Charges are listed on the report according to the governing library for fine calculation. Payments, credits, and waives are listed according to the library where the transaction took place. You can filter this report by organization, including the system organization. If you prefer a summary, run the Fines and Fees Summary report.
- **Fines and Fees Summary** - For a specified date range, reports the total amounts for fines and fees transactions (for example, payments, waives, refunds, and charges), according to transaction type. You can filter this report by organization, including the system organization.

- **Fines by Amount** - This report provides basic information about patrons with account charges in a specified range of amounts. You select one, several, or all branches in the system and specify a fine amount range. The branches are patrons' branches; for the fine amount range, valid **From** and **To** values are $0.00 up to $9,999,999.99. The **To** value must be greater than the **From** value. (The amount includes all charges, not just fines.) The report lists all patrons by selected registered branch who have any outstanding unpaid charges within the specified fine range. The report is divided into sections by registered branch. Within each branch section, the report is sorted by patron last name and amount. Totals of all amounts owed for each branch are included, as well as the grand total of amounts owed for all selected branches. Includes the following information for each patron:
    - **Patron barcode**
    - **Patron name** - Last, First Middle, Suffix
    - **Patron code**
    - **E-mail address**
    - **Postal address**
    - **Phone** - Lists all phone numbers and carriers, if appropriate
    - **Charges** - The total amount of charges owed.
- **Waived Fines** - Reports all waived fines during a specified period, including the staff member and computer workstation responsible for each waive transaction. The report groups the auto-waived fines (fines that are automatically waived at check-in, if any) and regularly waived fines (fines manually waived by staff members). It also includes an auto-waive total, waive total, and grand total for each patron, as well as a total for each organization. The report is sorted by organization, patron name, and transaction type (auto-waive and waive). You can filter this report by organization.

E-Commerce Credit Card Reports

These reports help you track credit card transactions. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Patron Financial** in the Polaris Reports dialog box.

- **Fines and Fees - Credit Card Payments** - PayPal Payflow Pro, Payflow Link, or Comprise SmartPAY. Lists payments for charges, including details such as each patron's total payment credit transaction ID, as well as individual charges and processing fees, the items associated with charges, and the patron barcode. Declined transactions, credits, and voided transactions are also listed. You can filter this report by a date range and by organization. The report includes subtotals by organization. The organization is the organization associated with individual charges on the patron's account.

Note:
The **Fines and Fees - Credit Card Payments** report records payments made through Payflow Link, but do not reflect credit or void transactions.

- **Hosted Credit Card Payments** - Payflow Link, Payments Gateway, or Comprise SmartPAY. Tracks credit card payments in the patron account made through the hosted gateway. You can set a date range and select one, several, or all organizations, and set a sort order by patron barcode, StoreOrder ID, or transaction date. The organization is the patron's registered branch for fines and fees payments, or the receiving branch for donations.

  Note:
  If your library accepts credit card payments through a hosted gateway for reasons other than patron fines and fees or donations, such as gift shop purchases, those payments do not appear on the Polaris Hosted Credit Card Payments report. However, the transactions are available in the hosted gateway's reports.

- **Refunds to Credit Card Payments** - Payflow Link, Payments Gateway, or Comprise SmartPAY. Helps you track refunds to credit card payments that have been made in the Polaris patron account. Use this report to reconcile refund transactions made in Polaris with transactions in hosted gateways. You can set a date range and select one, several, or all organizations.

Active Network (Class) POS Reports

These reports help you reconcile Class POS transactions in Polaris. On the Polaris Shortcut Bar, select **Utilities, Reports and Notices, Public Services, Patron Financial**, **Active Network POS**.

- **Daily Cash Balance Detail** - For Class POS customers. Reports payments by payment type per the POS detail during a specified date range. The report includes only those POS payments taken in Polaris.
- **Daily Cash Drawer POS** - For Class POS customers. A copy of the Daily Cash Drawer report that includes the POS Transaction ID for payment transactions.
- **Non POS Payments** - For Class POS customers. For a specified date range, this report lists all payments made in Polaris that did not go through the POS system.
- **Sales Summary Report** - For Class POS customers. This report is comparable to a similar CLASS report that summarizes all payments, refunds, and adjustments by reason for a specified date range. You can select organization (including the system organization), workstation, and user parameters.

Serials Reports

To access Serials reports, select **Utilities** from the Polaris Shortcut Bar, and select **Reports and Notices, Serials**.

Tip:
There may be other unreceived issues or parts with a status of Never Published or Not Available. You can search for the issues or parts using the Find Tool, select **Status** in the **Limit by** box, and select the statuses.

- **Issues or Parts not Received** - Lists the issues or parts that were not received as expected. Only the issues with a status of Expected, Pending Claim or Claimed are listed in this report.
- **List of Subscriptions by Publisher -** Lists the subscriptions your library is receiving, according to the publisher in the linked bibliographic record's 260 tag, $b. To generate the report, you specify a subscription record status (open, canceled, or all), an expiration date or date range, and the publisher's name.
- **List of Subscriptions by Subject -** Lists the subscriptions your library is receiving, according to the subject in the linked bibliographic record's 6XX tag. To generate the report, you specify a subscription record status (open, canceled, or both), an expiration date or date range, and the subject. You can include multiple subjects separated by **#**.
- **List of Subscriptions by Supplier** - Lists the subscriptions your library is receiving, according to the supplier linked to the subscription record. To generate the report, you specify a subscription record status (open, canceled, or both), an expiration date or date range, and the supplier's name. You can select multiple suppliers.
- **Monthly Check In Statistics** - The number of issues a library has received during a specified time period.
- **Renewal Reminder** - Identifies the subscriptions due to be renewed within a specified time period. You can compare this report with the paper renewal list that the supplier sends to confirm that the library and the supplier have the same information about the subscriptions. Select one or more organizations (or select All), select the subscription start date and expiration date range, and the supplier or suppliers. The report lists the titles (grouped by organization and supplier) that are up for renewal. It also shows the total cost for each subscription and the total cost by supplier.
- **Serial Holdings Records by Branch** - Lists the serial holdings records for a specific branch.
- **Subscription Cost Analysis** - Provides a graphical representation of a subscription's cost for the years that your library has tracked the cost in Polaris. You can set the report to show a single subscription or multiple subscriptions. You can also print the report from the Subscription Record workform (**File, Print, Subscription Cost Analysis**) to report on that specific subscription record.
- **Subscription Expenditure Prediction -** Projects a library's expenditures, based on a specified percentage increase. The report applies only to subscriptions with a status of open. You can also print the report for a specific subscription from the Subscription Record workform (**File, Print, Subscription Expenditure Prediction**).

- **Titles Not Automatically Renewed -** Identifies subscriptions that were not automatically renewed, so they can be renewed manually. Select one or more organizations and one or more suppliers. The report lists the subscriptions by supplier, the status of the subscription, the fund that was used to pay for the subscription, the price, and the number of active and fulfilled.

System Reports

To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **System** in the Polaris Reports dialog box.

- **Statistical Summary** - Detailed information about system activity, including new charges, money collected, refunds, amounts waived, and outstanding fines. To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **System** in the Polaris Reports dialog box.
- The **Hierarchy of Library, Branches, & Collections** report lists all the collections assigned to each branch in the system, organized by system, library, and branch. You can filter the report by organization. To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **System** in the Polaris Reports dialog box.

Invalid Postal Codes Report

You can run the Polaris System report **Invalid Postal Codes** to identify the invalid postal codes (both U.S. and Canadian) currently in use, and the patron, fund, and supplier records that are using the invalid codes.

Staff and Workstation Reports

The following reports identify the staff members and workstations registered in Polaris.

- **Affiliated Branches of Staff Members** - Lists the staff members associated with each branch, organized by system, library, and branch. You can filter this report by organization.
- **Hierarchy of Libraries, Branches & Workstations** - Lists the workstations assigned to each branch in the system, organized by system, library, and branch, including the computer names and workstation display names. You can filter this report by organization.

Basic Shortcut Keys

This appendix contains charts with the basic Polaris keyboard shortcuts. The cards are designed to be photocopied, trimmed, and put into transparent sleeves that attach to the computer monitor. You can order these sleeves from vendors such as Axzo Press at the following Web site:

http://www.axzopress.com/Products/Products_FlipCARDS.aspx

- “Polaris Keyboard Shortcuts” on page 149
- “Shortcut Bar: Menu Access Keys” on page 149
- “Find Tool Access Keys” on page 149
- “Workforms: Menu Access Keys” on page 149
- “Workforms: Shortcuts” on page 149

Polaris Keyboard Shortcuts

Select all	CTRL+A
Copy	CTRL+C
Delete	CTRL+D
Log on, log off	CTRL+L
New	CTRL+N
Open	CTRL+O
Print current view	CTRL+P
Print list view	CTRL+SHIFT+P
Reports	CTRL+R
Save	CTRL+S
Paste	CTRL+V
Launch browser	CTRL+W
Cut	CTRL+X
Redo	CTRL+Y
Undo	CTRL+Z
Clear	DELETE
Topic or workform help	F1
Open Check-in workform	F2
Open Check-out workform	F3
Refresh	F5
Find patron (status)	F6
Find patron (registration	F7
Properties	F8
Find bibliographic records	F12
Find items	CTRL+ALT+F9

Shortcut Bar: Menu Access Keys

File	ALT+F
Acquisitions	ALT+A
Serials	ALT+S
Cataloging	ALT+C
Patron Services	ALT+P
Circulation	ALT+R
Administration	ALT+M
Utilities	ALT+U
Window	ALT+W
Help	ALT+H

Find Tool Access Keys

Object box	ALT+O
By box	ALT+B
Type box	ALT+Y
For box	ALT+F
Search button	ALT+S
Stop button	ALT+T
New Search button	ALT+N
Help button	ALT+H
Retrieve all records in search results	CTRL+SHIFT+A
Display context menu	SHIFT+F10

Workforms: Menu Access Keys

File	ALT+F
Edit	ALT+E
View	ALT+V
Links	ALT+L
Tools	ALT+T
Help	ALT+H

Workforms: Shortcuts

Workform Help	F1
Print (current view)	CTRL+P
Print (list view)	CTRL+SHIFT+P
Display context menu	SHIFT+F10
Expand tree	SHIFT+ALT+* (numeric keypad)
Collapse tree	SHIFT+ALT+- (numeric keypad)
Move among open workforms	ALT+TAB
Switch views in a workform	CTRL+TAB
Close workform	ALT+F4
Save record	CTRL+S
Delete record	CTRL+D
Properties	F8

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