Polaris® Administration Guide

POLARIS
LIBRARY SYSTEMS
Count on us.

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Contents

About This Guide

This guide contains information about Polaris® Administration settings that control basic Polaris operations. It is intended for Polaris administrators and anyone responsible for setting up, customizing, and maintaining Polaris for the library system.

Polaris Administration Topics

Important:
For information about developments that may have occurred after this information was published, go to **www.polaristown.com**.

Getting Started in Administration Polaris Administration hierarchy; administration records; the Administration Explorer; object locks.

Editing Parameters, Profiles, and Tables Basic procedures for working with parameters, profiles, policy tables, and database tables in Polaris Administration; setting staff client profiles. Setting visual cues for staff client log-in server; automatic staff client log-in.

Setting Up Organizations Creating and editing system, library, and branch records; setting up resource groups for remote resource access; setting up addresses, postal codes, contacts, and dates closed; viewing licenses.

Working with Collections Setting up and editing collection records; associating collections with branches; deleting collections; collections report.

Setting Up Workstation and Staff Member Records Setting up and editing workstation and staff member records; identifying in-house computers; staff and workstation reports.

Granting Permissions Setting up Polaris security and permissions; using permission groups to manage permissions; setting permissions specifically related to Polaris Administration.

Setting Up Server Records Registering local and remote servers in Polaris; setting server parameters; telephony servers; Polaris and MuseGlobal federated searching; making databases available as staff client search targets; offering the Polaris database as a search target.

Specifying Report Servers Server and URL settings for SQL Server Reporting Services; Windows authentication for reports access.

Ensuring Locale and Time Consistency Enabling automatic checking for consistency in date and currency formats, as well as the time recorded for logs and transactions.

Setting Search Tool Characteristics	Settings that affect the general behavior of the Polaris Find Tool and public catalog search functions, including search databases, leading articles for browse searches, languages for scoping, Find Tool filtering and defaults.
Setting Preferred Workform Views	Setting opening views for the Bibliographic, Item, and Patron Status workforms.
Collecting Transaction Statistics	Selecting which Polaris actions to include in the log file; Polaris transactions database queries; Statistical Summary report; *Library Journal* circulation statistics.
Defining Barcode Formats	Setting barcode formats for item and patron records; significant digits in patron barcodes; saving records with invalid barcodes.
Setting a Default Web Page	Enabling the Web Browser option on the Polaris Shortcut Bar, and specifying the default Web page that opens when the option is selected.
Defining Online Documentation	Determining which documents are available from the Help menu.
System Administration Permissions Reference	List of System Administration permissions with summary descriptions.
Setting Up Computype Label Printers	Setting up Computype label printers; finding and entering printer commands.
Find Tool Permissions Reference	List of Find Tool permissions with summary descriptions.
Polaris Permission Groups - Default Permissions Reference	List of the default permission groups and their initial permissions.
Staff Client Profiles Reference	List of Staff Client profiles with summary descriptions.
Administration Tables Reference	List of policy, database, and notification tables with summary descriptions.
Record Ownership Fields Reference	List of the Polaris record fields that identify record ownership, useful when setting permissions.
Polaris SQL Jobs Reference	Summary of the SQL jobs that handle Polaris automatic processing operations.
Administration Shortcut Keys	List of shortcut keys formatted for convenient printing and clipping.

Related Resources

- *Polaris Installation Guide*

  Contains information about installing and updating Polaris servers, staff client software, and public access software.

- Polaris Administration Guides

  This guide is part of a Polaris Administration document set. The set also includes the following guides:

  - *Polaris Patron Services Administration Guide* - Contains information about setting up patron services and circulation functions, and granting permissions to your front desk staff and supervisors.
  - *Polaris Public Access Administration Guide* - Contains information about setting up and customizing Polaris® PowerPAC™, Polaris® PowerPAC™ Children's Edition, and Polaris® Mobile PAC™.
  - *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.

- *Polaris Basics Guide*

  Contains basic Polaris information, including procedures to start Polaris tasks, find, create, and display records, and run reports. This guide also discusses how to use Polaris documentation, including online Help.

- *Polaris Online Help*

  Polaris online Help is accessible from the Help menu on the Polaris Shortcut Bar or any Polaris workform, or by pressing **F1** with a Polaris window active.

- 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.

Getting Started in Administration

Polaris is a Microsoft Windows-based client-server application. Staff members use staff client software, while the server stores, retrieves, and protects data.

Library staff and administrators use the staff client to do administrative, technical services, and patron services tasks.

Your patrons may use one or a combination of the following Web-based applications:

- Polaris® PowerPAC™ provides Web-based access to library searches and services from remote computers, and from computers in the library.
- Polaris® PowerPAC™ Children’s Edition is the Web-based application designed specifically for children’s use.
- Polaris® Mobile PAC™ is the Web-based public access catalog that has been optimized for mobile devices. It provides simplified access to many of the features that are available in Polaris PowerPAC.

Your Polaris system may also include Polaris ExpressCheck client workstations for self-check and patron account access, Polaris Inventory Manager software and hardware, and other related products.

Polaris Administration settings determine how data is categorized, used, and stored, and what functions are available in the staff client software and the PAC.

Note:
Certain Polaris features are available by specific contract to your library. If your Polaris installation does not include a specific feature, the Polaris Administration controls for the feature may not be available.

See the following topics:

- “Polaris Administration Records” on page 5
- “Accessing Administration Records” on page 7
- “Managing Record Locks” on page 12

Polaris Administration Records

In Polaris Administration, these organizational levels create the basic structure (hierarchy) of your system:

- **System** - The system level is at the top of the Polaris hierarchy. It represents a single library or group of libraries that use one Polaris system. Only one system-level administration record is defined for each Polaris installation.
- **Library** - In Polaris, organizations at the library level can represent any of the following entities:
  - A single, functional repository (branch) in the system

    Important:
    If you create a library level consisting of a single functional repository, you also need to create a branch level for that facility.
  - Multiple branches, with the library itself being a functional branch in the system
  - Multiple branches, but the library organization itself is not a functional repository (branch) in the system

  Each organization at the library level is represented by its own record.
- **Branch** - A branch is part of a library, usually in a separate physical location or repository, consisting of one or more collections. Each branch you identify must be associated with a parent at the library level. Each branch is represented by its own record.

Staff member and workstation records are associated with specific organizations in your Polaris system. They take many settings from the organization with which they are associated. By setting permissions, you control what each staff member is allowed to do, and what tasks can be done on a staff or public workstation. You can place staff members, workstations, and even entire organizations into permission groups, and then give all the members of the group a set of permissions.

In addition, server records contain information about the computers that control Polaris, store the catalog database, and handle Internet traffic.

See the following topic:

- "Polaris Administration Settings" on page 6

Polaris Administration Settings

You set up and customize Polaris using the following types of settings:

- **Permissions** control access to functionality within Polaris (who can do which tasks).
- **Parameters** define guidelines for the way Polaris operates.
- **Profiles** represent library policies that apply to specific functionality, such as what information is displayed by default in a selection list or which controls are displayed on the client user interface.
- **Policy tables** define the operating policies, such as fine amounts, material types, and patron codes.
- **Database tables** define the way Polaris works for processes such as authority control and bibliographic indexing.

Some settings are shared by all organizations in Polaris, while other settings can be independent. For example, you can make most settings that control functions available in the PAC at the branch level, without affecting the PAC functions are offered at other branches. With certain exceptions, each organization at a level in the Polaris system administration hierarchy can set its controls without affecting the settings for the higher levels. (Certain settings are available *only* at a specific level.)

Accessing Administration Records

You can work with most administration records by using either of the following methods: by accessing the record in the Administration Explorer, or by opening the appropriate workform for a specific record.

Note:
Procedures covered in Polaris Administration topics use the Administration Explorer method, unless you must specifically open the record workform.

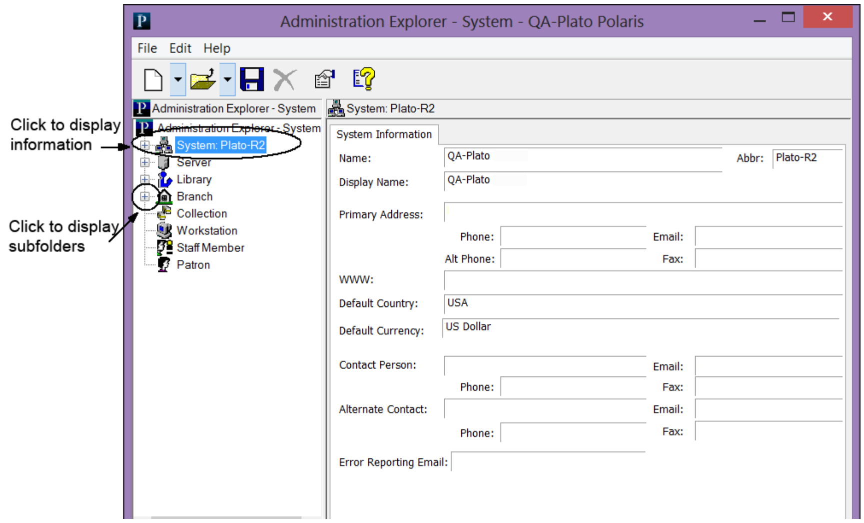
See the following topics:

- "Administration Explorer" on page 7
- "Administration Record Workforms" on page 8
- "Use the Administration Explorer" on page 8
- "Find an administration record" on page 10

Administration Explorer

The Administration Explorer is a hierarchical list of administration records available from the Administration menu on the Polaris Shortcut Bar. You use the Explorer to navigate among organizations, staff members, and workstations and select a record to modify.

The Administration Explorer is divided into two views. The left part of the Explorer displays a list of administration levels and tables in a tree view. Plus signs (+) on the tree indicate that the administration level has linked or associated data. You can click a plus sign to display the subfolders for the administration level. The right part of the Administration Explorer displays the values and settings related to a selection in the tree view. For example, if you select the system organization in the tree view at the left, general information about the system organization is displayed on the right.



Administration Record Workforms

You can also use the Polaris Find Tool to search for and open an administration record. The record opens in a workform specific to the record type. You can open multiple workforms at the same time and navigate among them. Most of the settings available for a record in the Administration Explorer are also available from the workform. See “Find an administration record” on page 10.

Use the Administration Explorer

1-2-3

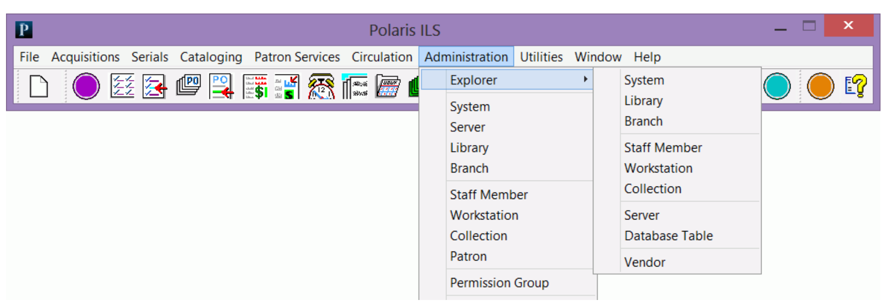
Follow these steps to display the Administration Explorer.

1. Log on to the Polaris staff client.
2. Select **Administration** from the Polaris Shortcut Bar to display the Administration menu.
3. Select **Explorer** from the Administration menu.

   The Explorer submenu appears.

Tip:

On the toolbar, click [icon] then click [icon] to display the Administration Explorer.

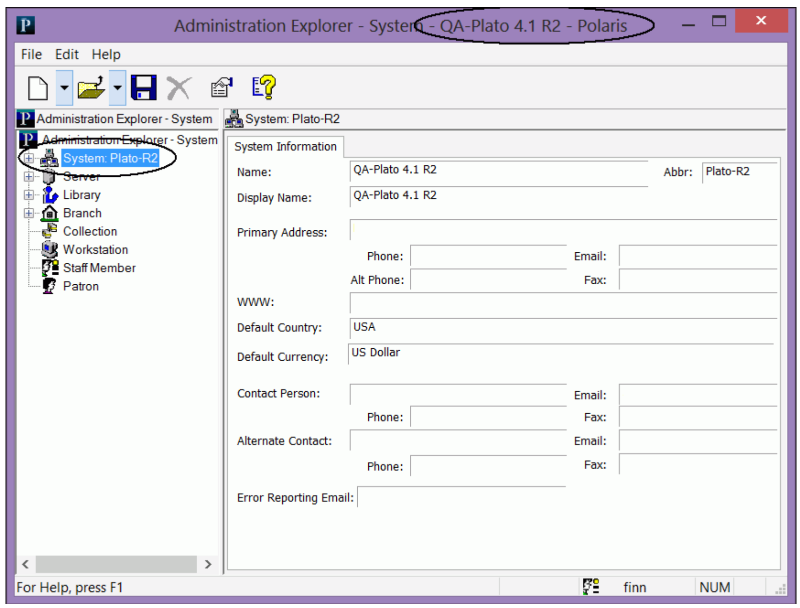


4. Select the type of record to display in the tree view of the Administration Explorer:

Tip:
If you open the Explorer at the **System** level, you use the Polaris Find Tool to select and add records to display in the tree view for staff members, workstations, and collections. For an example of this procedure, see “List staff members in the Explorer” on page 98.

- **System** - Shows all Polaris administration levels in the tree view.
- **Library** - Shows the library organizations in the tree view, along with the branches associated with each library.
- **Branch** - Shows the branch organizations in the tree view. Click **+** next to a branch, and then click **+** next to **Collection**, **Workstation**, or **Staff Member** to list the records associated with the branch.
- **Staff Member** - Click **Search** to find and list staff members.
- **Workstation** - Click **Search** to find and list workstations.
- **Collection** - Click **Search** to find and list collections.
- **Server** - Shows the servers registered in Polaris.
- **Database Table** - Shows the System, Library, and Branch levels. Click **+** next to a level to display the types of tables available at that level.

The Administration Explorer appears. The title bar of the Explorer displays the level you selected.



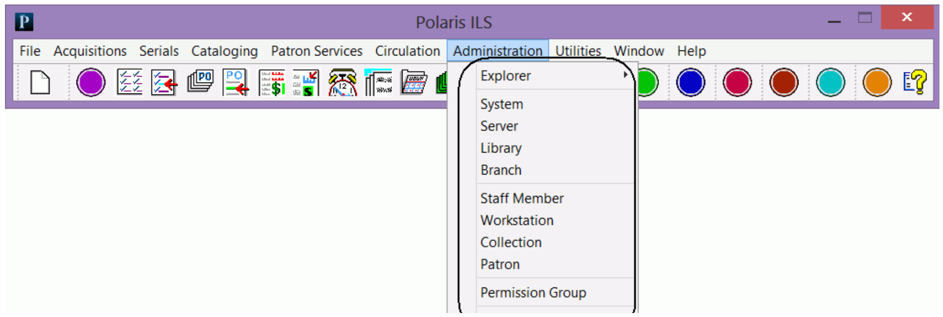
Tip:
You can view organization ID values in Polaris Administration. In the Administration Explorer, right-click an organization and select **Properties** from the context menu. Select the About tab on the Properties dialog box. **Polaris system ID number** identifies the organization ID.

5. Work with administration records using any of these methods:
   - Click the plus sign (+) by an object in the tree view, or double-click the object, to expand the object and display associated items. When you select an item, the details view of the Explorer displays information about the selected item.
   - Right-click an organization, collection, workstation, or staff member, and select **Edit** from the context menu to display an administration record in a workform.
   - Use the Polaris Find Tool to search for and display an administration record in a workform. See “Find an administration record” on page 10.
6. To quit working with the Explorer, click **File**, **Close** on the Explorer menu bar.

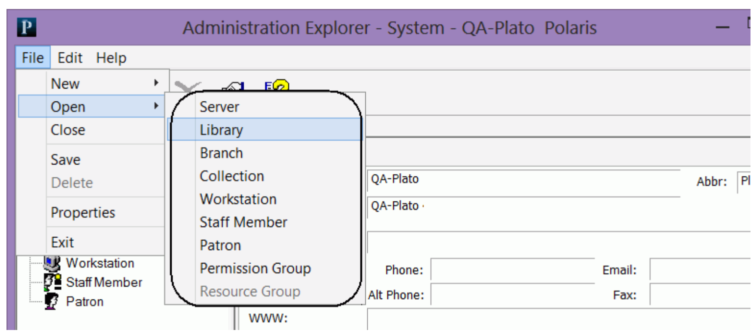
Find an administration record

Follow these steps to use the Polaris Find Tool to find and open an administration record in a workform.

1. Open the Polaris Find Tool using one of these methods:
   - From the Polaris Shortcut Bar, select **Administration** to display the Administration menu. The Administration menu displays administration record options.

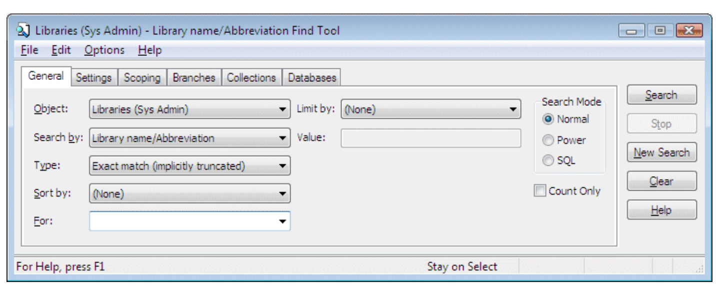


   - If the Administration Explorer is open, select **File**, **Open** on the Administration Explorer menu bar. The Open submenu displays administration record options.



2. Select the administration record type you want to find.

   The Polaris Find Tool appears. The selected administration record type is displayed in the **Object** box.



3. In the **For** box, type the partial or complete search text that describes the records you want to view.

4. If you want to focus the search, select a limiter in the **Limit by** box, and set a value for the limiter in the **Value** box.

5. If you want your search results to be sorted, select the **Sort Results** check box.

6. Click **Search** to begin the search, or press **ENTER**.

   Your results appear in the results list at the bottom of the Find Tool window. To load all the results in a large list, press **CTRL+SHIFT+A**.

7. Do one of the following actions to work with an item in the results list:
   - Double-click a line item to open the record.
   - Right-click an item in the results list to see the record's properties, add the record to a group, or do other tasks without opening the record.

Related Information

- **More about the Find Tool** - See "Finding Polaris Records" in the *Polaris Basics Guide 4.1R2*.
- **Patron records** - You can also find and open patron records from the Administration menu or the Administration Explorer menu bar, as well as by selecting **Patron Services, Patron Records** from the Polaris Shortcut Bar. See "Patron Services Records" in the *Polaris Patron Services Guide 4.1R2* and "Finding Patron Records" in the *Polaris Patron Services Guide 4.1R2* for more information.
- **Creating administration records** - You register new servers, libraries, branches, collections, workstations, staff members, and permission groups in Polaris by creating new administration records. For specific procedures, see the following topics:
  - "Working with Libraries" on page 46
  - "Working with Branches" on page 50
  - "Working with Collections" on page 75
  - "Setting Up Workstations" on page 85
  - "Setting Up Staff Records" on page 95
  - "Managing Permissions with Permission Groups" on page 118
  - "Registering Polaris Servers" on page 152

Managing Record Locks

When a Polaris record is open, an entry is automatically made in the Object Locks table so that no one else can change the record. When the record is closed, the entry is automatically removed from the Object Locks table. Occasionally a record remains locked when it does not close correctly, as may happen when there has been a computer problem. In this case, you can unlock the record and make it available for use by deleting the appropriate entry from the Object Locks table. See "Remove a record lock manually" on page 12.

Object locks are automatically removed in certain situations:

- If the staff client has closed unexpectedly and the user logs back in, that user can resume working with the objects that he or she had opened when the staff client closed unexpectedly. The object locks are automatically cleared from the Object Locks table.
- A system process automatically clears any object locks remaining in the Object Locks table when MS SQL Server has stopped and is restarted. When clients reconnect to the restarted server, all object locks are cleared.

Note:
Polaris blocks staff members with the same login from accessing the same record at the same time. The record is locked when the first user opens it.

See the following topic:

- "Remove a record lock manually" on page 12

Remove a record lock manually

Follow these steps to remove a lock on a record that did not close correctly.

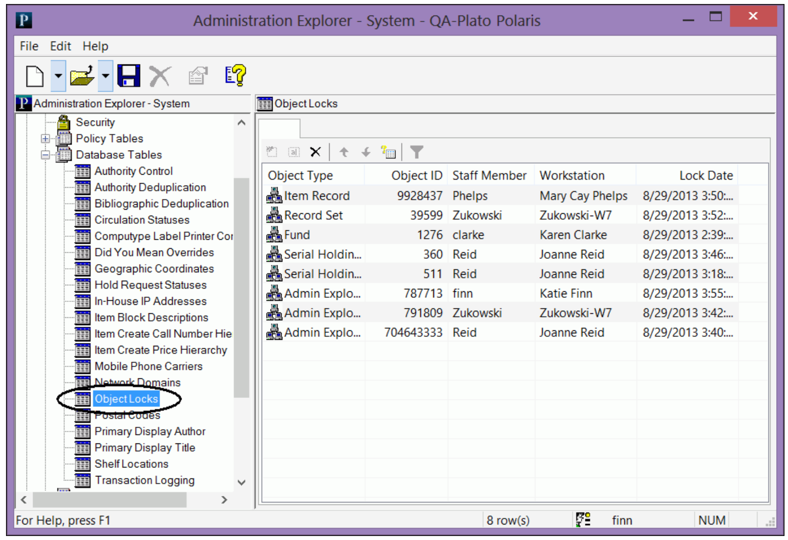
Important:
Do not use this procedure for records that are actually in use.

1. In the Administration Explorer tree view, expand an organization (system, library, or branch), and expand **Database Tables** under the organization.

   Note:
   The Objects Locks table is available only in the Administration Explorer (not from an organization workform). Changes affect all organizations.

2. Select **Object Locks** under **Database Tables**.

   A list of record lock entries appears in the details view. The entries are sorted by record type. (Click the **Staff Member** column heading to sort the entries by user name.)



3. Select the entry to unlock, and click ✕ to remove the record lock entry.
The record lock entry is removed from the Object Locks table.

Editing Parameters, Profiles, and Tables

Polaris parameter and profile settings, as well as policy and database tables, control how Polaris functions. Most settings are established during Polaris implementation and installation. You can modify most of them as needed through Polaris Administration workforms and the Administration Explorer.

Some organization levels have specific settings not shared with any other level, while other settings are shared. For example, a branch may have its own unique settings for many functions, but inherit other settings from the library and system levels. Polaris uses settings from the lowest organizational level in which they are defined. If a setting is not defined at the lowest organization level (branch), Polaris looks for it at the next highest level (library). If a setting is not found at the library level, the setting defined at the system level is used. Certain parameters and profiles can be set only at a specific organizational level. Some settings can be made at the workstation or staff member level, and these apply only to the workstation or staff member.

For some settings, especially those dealing with cataloging policies, the libraries and branches in your system need to agree on the policies to be implemented because they apply to all organizations. Others must be set individually for every organization in Polaris.

> **Note:**
> Polaris Administration settings also control organization security and permissions. See “Granting Permissions” on page 106.

See the following topics:

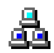
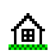
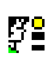
- “Setting Parameters and Profiles” on page 15
- “Working with Tables” on page 24
- “Setting Staff Client Profiles” on page 33
- “Visual Cues for Staff Client Log-On Server” on page 35
- “Automatic Staff Client Log-On” on page 38

Setting Parameters and Profiles

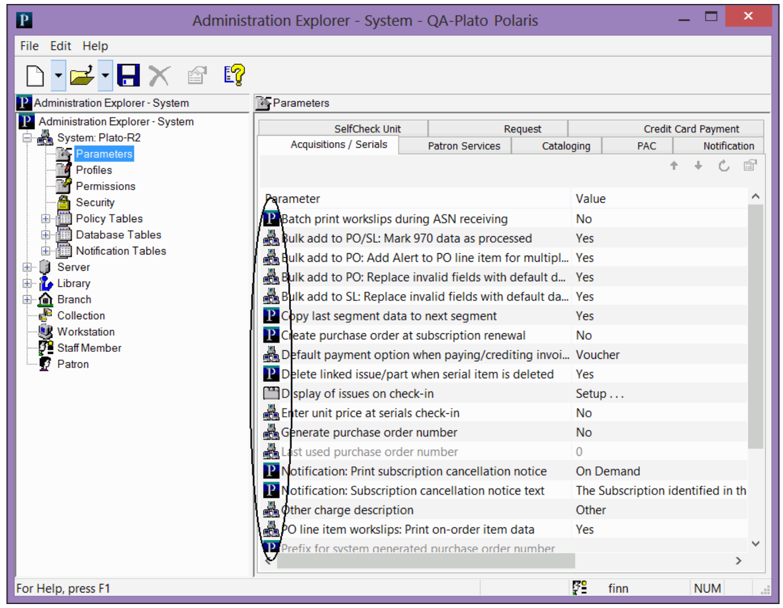
Parameter and profile settings customize the Polaris staff and public access applications for the specific organizations, workstations, and staff members in your system. You can set parameters and profiles by any of the following methods:

- Going to the organizational level and entering a setting
- Giving (transmitting) a setting to multiple lower organizations, workstations, and staff members
- Taking (inheriting) the setting from the next level above

You can identify the level at which a parameter or profile has been set by a small icon in the Administration Explorer or on a workform:

-  – Setting has not been changed since Polaris was installed.
-  – Setting belongs to the system organization level. All organizations use the setting unless it is changed at a lower level. If the icon is displayed for settings opened at the library and branch level, then the setting is shared by all other organizations in the Polaris installation. *If the setting is changed at the library or branch level, the change applies to the whole system.*
-  - Setting belongs to the server level. All organizations use the setting.
-  - Setting belongs to the library organization level. If the icon is displayed for settings opened at the branch level, then the setting is shared by all branches in the library.
-  - Setting belongs to the branch organization level. Each branch in the Polaris installation can have its own setting, different from other branches.
-  - Setting belongs to the workstation. Each workstation can have its own setting, different from other workstations at the same branch.
-  - Setting belongs to the staff member. Each staff member record can have its own setting, different from other staff members at the same branch.

The illustration shows a portion of the Acquisitions/Serials tabbed page for system-level Parameters in the Administration Explorer.



Parameters are guidelines for the way Polaris operates. They are set at the system, library and branch levels. Some parameters can be set at more than one level. They are organized in the following categories:

- **Acquisitions/Serials**
- **Patron Services**
- **Cataloging**
- **PAC**
- **Notification** (mail, e-mail, and telephone notification)
- **SelfCheck Unit** (SIP units and Polaris ExpressCheck)
- **Request** (holds and ILL)
- **Credit Card Payment**

Profiles represent library policies in the operation of Polaris, and define what is displayed in the staff client and PAC user interfaces. They apply to system, library, branch, workstation, and staff levels. Some profiles can be set at more than one level. They are organized in the following categories:

- **Acquisitions/Serials**
- **Patron Services**
- **Cataloging**
- **PAC** (Polaris PowerPAC, Polaris Mobile PAC)
- **PowerPAC** (Polaris PowerPAC; certain settings affect Mobile PAC)
- **Community** (Polaris Community Profiles)
- **Children's PAC** (Polaris PowerPAC Children's Edition)
- **Staff Client**
- **Mobile PAC** (Polaris Mobile PAC)

See the following topics:

- "Set parameters or profiles from the Explorer" on page 17
- "Set parameters and profiles from a workform" on page 19
- "Transmit a parameter or profile" on page 21
- "Inherit a setting" on page 22
- "Restore an inherited setting" on page 23

Set parameters or profiles from the Explorer

Follow these steps to set parameters or profiles using the Administration Explorer.

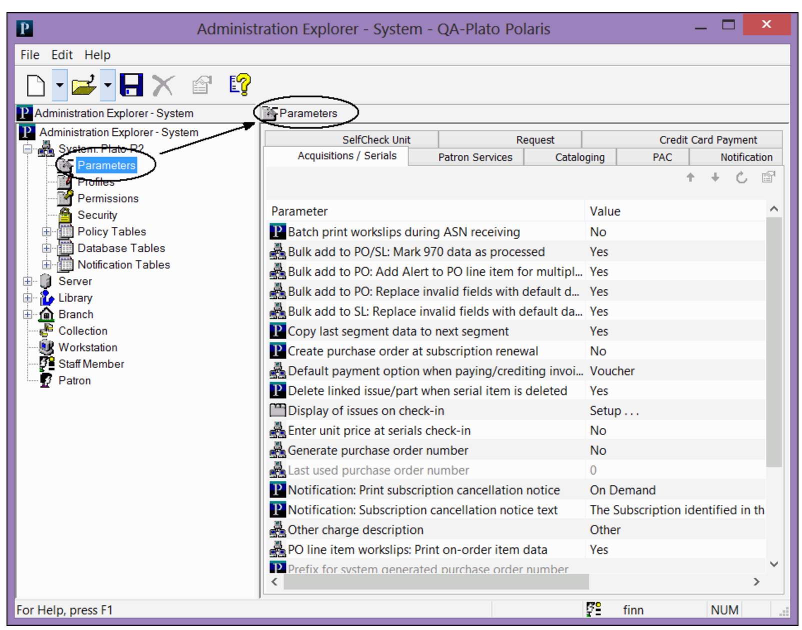
> **Note:**
> To set parameters and profiles, you need the permissions **Modify parameters: Allow** and **Modify profiles: Allow**. See "Granting Permissions" on page 106.

1. In the Administration Explorer tree view, open the organization, workstation, or staff member folder.

    > **Note:**
    > For more information about listing workstations and staff members in the Explorer, see "List workstations in the Explorer" on page 89 and "List staff members in the Explorer" on page 98.

2. Select (highlight) **Parameters** or **Profiles** in the list under the expanded folder.

    The **Parameters** or **Profiles** tabs are displayed in the details view of the Explorer.



3. Click the tab for the category that contains the setting you want to change.

The tabbed page for the category is displayed.

4. Double-click the setting you want to change.

   The field or a dialog box opens.

5. Change the setting by typing new values or selecting options.

Tip:
To reset the field to the last saved value, press **ESC**.

6. To close a field, do one of the following actions:
   - Select another parameter or profile in the tree view of the Explorer.
   - Press **ENTER**.

7. To close a dialog box, click **OK**.

8. Select **File, Save** to save your changes.

   Record(s) saved appears in the status bar.

   Note:
   Some changes require you to exit Polaris and log back in to see the effects of your changes in the staff client application.

Related Information

- **Give settings to a lower level** - See “Transmit a parameter or profile” on page 21.
- **Get a setting from a higher level** - See “Inherit a setting” on page 22.
- **Specific settings** - For details about specific settings, see the online Help index or the following topics:
  - **Acquisitions/Serials** - See “Acquisitions Administration” in the *Polaris Acquisitions Guide 4.1R2*.
  - **Patron Services** - See the *Polaris Patron Services Administration Guide 4.1R2*.
  - **Cataloging** - See the “Cataloging Administration” in the *Polaris Cataloging Guide 4.1R2*.
  - **Notification, SelfCheck Unit, Requests, Credit Card Payment** - See the *Polaris Patron Services Administration Guide 4.1R2*.
  - **Staff Client** - See “Staff Client Profiles Reference” on page 254.
  - **PAC settings** - See the *Polaris Public Access Administration Guide 4.1R2*.

Set parameters and profiles from a workform

Follow these steps to set parameters and profiles from an administration record workform.

1. Use one of the following methods to open the Polaris Find Tool:
   - Select **Administration**, ***Record Type*** on the Polaris Shortcut Bar. For example, to search for a branch record, select **Administration**, **Branch**.
   - If the Administration Explorer is open, select **File**, **Open** on the Administration Explorer menu bar, and specify the record type to find.

   The Polaris Find Tool opens.
2. Search for the administration record.
3. Right-click the record in the results list, and select **Open** from the context menu.

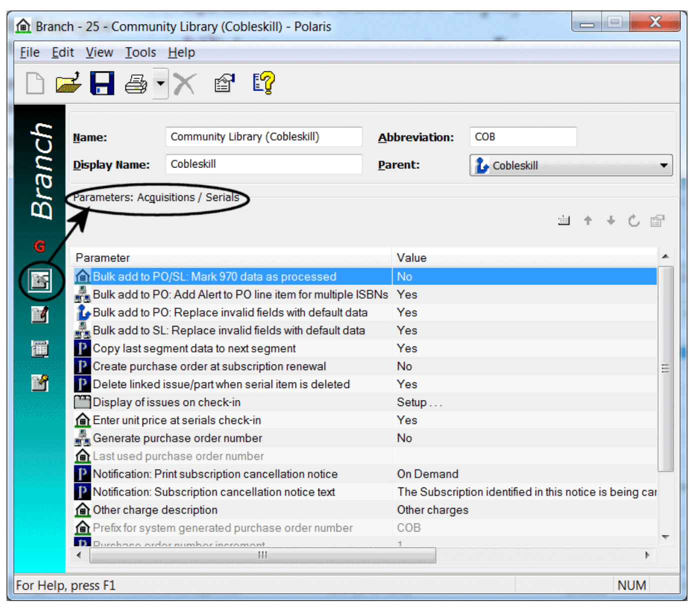
   The appropriate workform appears.
4. To display parameters, follow these steps:

   a) Select **View**, **Parameters** to display the Parameters menu.

   b) Select a parameters category.

   The parameters for the selected category display in the Parameters view of the workform.

Tip:
You can click **CTRL+G** to cycle through the workform views, or click the Parameters icon to display the Parameters list in the workform. Then click above the list, and select a parameters category.



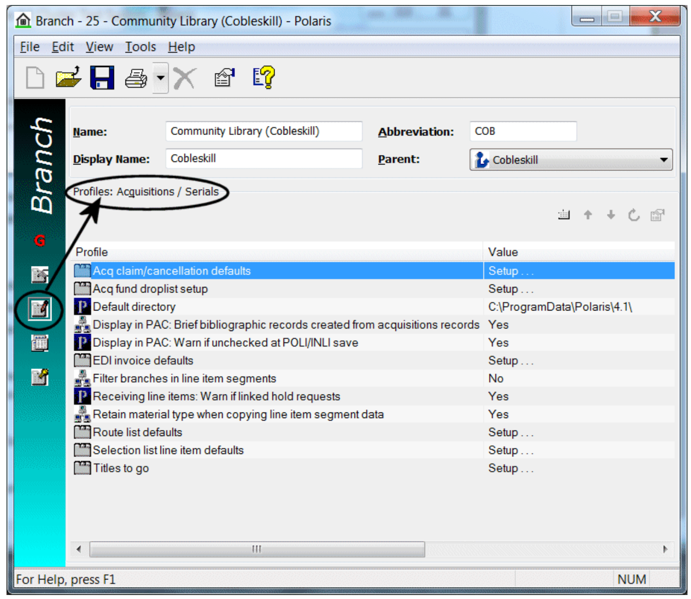
Tip:
You can click **CTRL+G** to cycle through the workform views, or click the Profiles icon to display the Profiles list in the workform. Then click above the list, and select a profiles category.

5. To display profiles, follow these steps:

a) Select **View, Profiles** to display the Profiles menu.

b) Select a profiles category.

The Profiles view of the workform displays the category's profiles.



6. Double-click the setting you want to change.

The field or a dialog box opens.

7. Change the setting by typing new values or selecting options.

Tip:
To reset the field to the last saved value, press **ESC**.

8. To close a field, do one of the following actions:

- Select another parameter or profile.
- Press **ENTER**.

9. To close a dialog box, click **OK**.

10. Select **File, Save** to save the changes.

Record(s) saved appears in the status bar.

Note:
To see the effects of your changes in the staff client application, exit the staff client application and log back in.

Transmit a parameter or profile

Follow these steps to give selected parameter or profile settings to lower levels. For example, you can transmit a setting from the library level to all the library's associated branches.

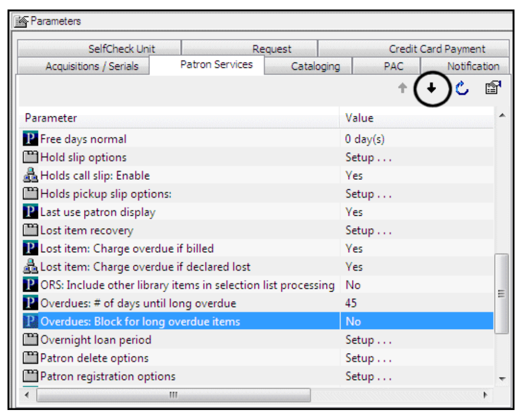
Note:
You cannot transmit a setting from the organization workform.

1. In the Administration Explorer tree view, expand the organization from which you want to transmit the setting.
2. Select (highlight) **Parameters** or **Profiles** in the list under the expanded organization.

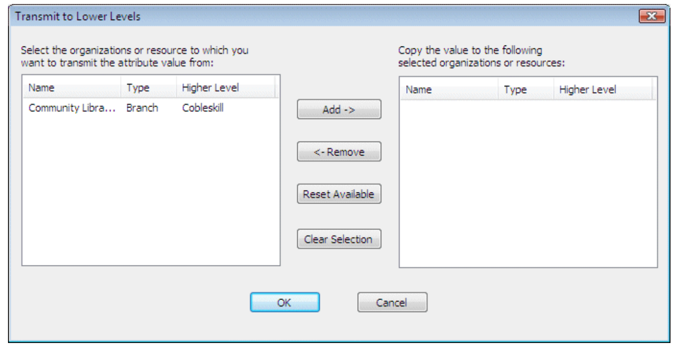
   The **Parameters** or **Profiles** tabs are displayed in the details view of the Explorer.
3. Click the tab for the category that contains the setting you want to transmit.

   The tabbed page for the category is displayed.
4. Select the parameter or profile you want to transmit to subordinate levels.
5. Click on the list tool bar, or press **CTRL+T**.

   Note:
   Certain settings cannot be transmitted. The arrow button is unavailable when these settings are selected.



The Transmit to Lower Levels dialog box appears.



6. In the selection (left) list, select the organizations, workstations, and staff members to which you want to transmit the setting.
7. Click **Add** to move the selections to the copy (right) list, and click **OK**.

   The dialog box closes.
8. Select **File, Save**.

Inherit a setting

Follow these steps to have a record take a setting from the next higher organization level.

> **Note:**
> You cannot inherit a setting from the organization, staff member, or workstation workform.

1. In the Administration Explorer tree view, expand the organization, workstation, or staff member that should inherit the setting.

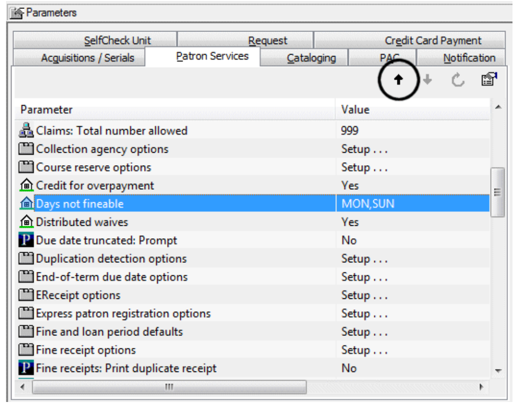
   > **Note:**
   > For more information about listing workstations and staff members in the Explorer, see "List workstations in the Explorer" on page 89 and "List staff members in the Explorer" on page 98.

2. Select (highlight) **Parameters** or **Profiles** in the list under the expanded folder.

   The **Parameters** or **Profiles** tabs are displayed in the details view of the Explorer.
3. Click the tab for the category that contains the setting you want the record to inherit.

   The tabbed page for the category is displayed.
4. Select the parameter or profile you want the record to inherit from the higher level setting.
5. Click on the list tool bar, or press **CTRL+I**.

   > **Note:**
   > Certain settings cannot be inherited. The arrow button is unavailable when these settings are selected.



The setting changes to that of the next higher organization.

6. Select **File**, **Save**.

Restore an inherited setting

Follow these steps to reset a parameter or profile to settings inherited from a higher organizational level.

> **Note:**
> This function is available only for certain parameters and profiles.

1. In the Administration Explorer tree view, expand the organization, workstation, or staff member.

> **Note:**
> For more information about listing workstations and staff members in the Explorer, see “List workstations in the Explorer” on page 89 and “List staff members in the Explorer” on page 98.

2. Select (highlight) **Parameters** or **Profiles** in the list under the expanded folder.

   The **Parameters** or **Profiles** tabs are displayed in the details view of the Explorer.

3. Click the tab for the category that contains the setting you want to reset.

   The tabbed page for the category is displayed.

4. Select the parameter or profile you want to reset.

5. Click  on the list tool bar, or press **CTRL+R**.

   The original setting is restored.

6. Select **File**, **Save**.

Working with Tables

Policy tables, database tables, and notification tables control specific operating polices, database characteristics, and certain telephone notification settings. Table settings cannot be transmitted or inherited. For some tables, the settings apply system-wide, while other table settings must be defined specifically for each organization.

See the following topics:

- “Administration Tables Displayed at the System Level” on page 24
- “Policy Tables” on page 25
- “Database Tables” on page 26
- “Notification Table” on page 26
- “Work with tables from the Administration Explorer” on page 27
- “Work with policy tables on an organization workform” on page 28
- “Add a table entry” on page 30
- “Change a table entry” on page 30
- “Reorder table entries” on page 31
- “Delete a table entry” on page 32

Administration Tables Displayed at the System Level

If a Polaris Administration table has too many rows to display at the system level (more than 5000), a message shows the number of rows and indicates if entries can be added at the system level. For the tables that allow bulk entries at the system level (where the same description is used across multiple branches), you can access the table at the system level and add entries even if the rows exceed the limit. For tables that do not allow bulk entries, you cannot access the table or add entries at the system level if the number of rows exceeds the limit.

The following message appears when you open the Item Statistical Class Codes policy table, the Patron Statistical Class Codes policy table, or the Shelf Locations database table at the system level and the table has more than 5000 rows:

This table is too large to display at the System level (16241rows). You can insert new rows here. They will be saved and display at the Library and Branch level.

You can add entries to these tables for duplicate descriptions across multiple organizations. You can also modify entries for all three tables and delete entries from the Shelf Locations database table at the system level.

When you add or modify entries at the system level, duplicate detection is performed, and a message shows the number of duplicates and the number of successful entries/modifications:

xx duplicate were found

xx rows were inserted/modified successfully.

The duplicates have been removed/replaced

If the table has 50 rows or more or many branches, you may notice a delay while duplicate detection processing takes place. Tables that may be susceptible to this delay include:

- Shelf Location
- Patron Statistical Codes
- Fine Codes
- Dates Closed
- School/Divisions
- Course Terms
- Course Names

If you attempt to access one of the following tables that do not allow bulk entries at the system level, and that table exceeds 5000 rows, the message displays only the first sentence, **This table is too large to display at the System level (21400 rows)**.

- Fines policy table
- Loan Periods policy table
- Holds Routing Sequences Primary policy table
- Holds Routing Sequences Secondary policy table
- Floating: To Branch policy table
- Floating: Material Types policy table
- Floating: Material Type Limits policy table
- Outreach: Included Branches policy table

Policy Tables

Policy tables specify the operating policies of organizations in the system. Some policy tables work together to form organization-specific policies.

Example:
The Patron Codes policy table at the system level defines patron classifications, such as Adult or Staff. The Fine Codes table defines various fine descriptions for an organization, such as Standard Fine Rate and Music CDs, without specifying actual rates. The Fines table establishes the actual organization-specific fine rates based on combinations of Patron Codes and Fine Codes.

Some policy tables can be opened from the Administration Explorer or from an organization workform. Other policy tables are available only from the Administration Explorer or only on an organization workform.

All tables can be opened at the system level. As a general rule, if a table contains no organization ID or name, then the table is used by all organizations. These tables display the same entries at the system, library, and branch levels. If the table contains an organization ID or name, the library or branch can have its own unique entries.

You must have the permission **Access tables: Allow** for your organization level to change a specific policy table. Only one person at a time can open a policy table.

Database Tables

Database tables help define how certain aspects of the Polaris catalog database work, such as authority control and bibliographic indexing, as well as what settings are available in certain fields and drop-down boxes in the Polaris staff client. Some tables are set at implementation and cannot be altered. Other tables can be edited.

Database tables are available from the Administration Explorer at the system, library, and branch levels. Changes to these tables at any level apply to all organizations. To modify a database table, you must have specific permission for the table.

If you need to change a table that cannot be modified from Polaris Administration, either contact Polaris Customer Support or use the SQL Analyzer to directly change the database table. Tables that cannot be modified from Polaris Administration require a complete reindex of the entire database if they are changed.

Important:
Polaris Library Systems is not responsible for your use of the SQL Analyzer to change Polaris database tables.

Notification Table

Entries in the Dates Not to Call notification table define the specific dates the phone notification server does not call patrons, such as Christmas and New Year's Day, for systems that use Polaris telephone notification. It is available from the Administration Explorer at the system level only, and the settings apply to the whole system. To modify this table, you must have specific permission for the table. For more information about this table, see "Delivering Notices by Phone (Outbound Telephony)" in the *Polaris Telephony Administration Guide 4.1*.

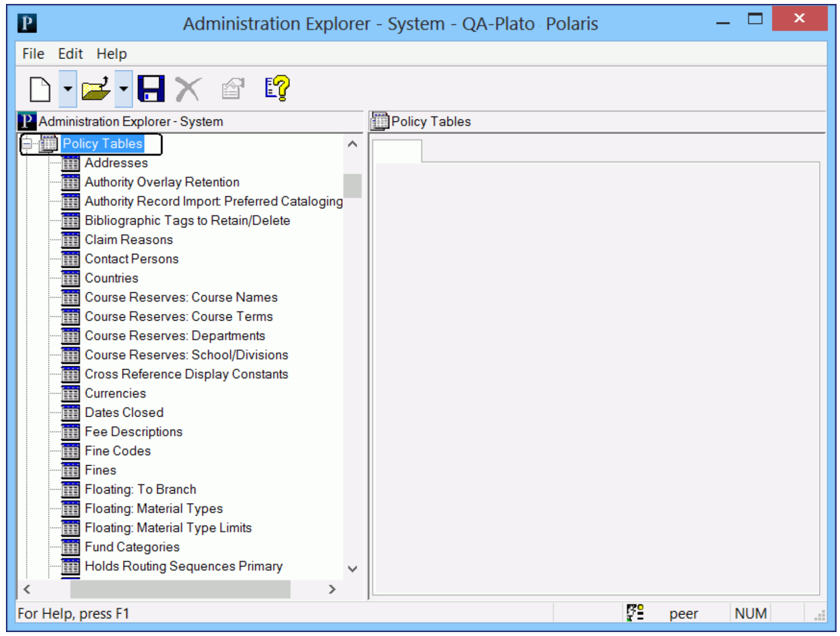
Work with tables from the Administration Explorer

Follow these steps to work with tables from the Administration Explorer.

1. In the Administration Explorer tree view, expand the organization.

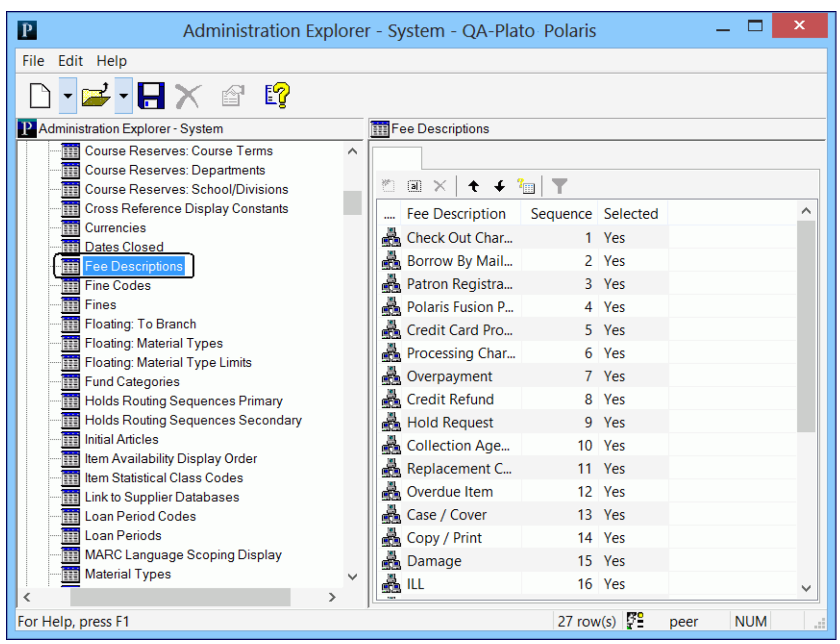
   Note:
   Notification tables are available only at the system level.

2. Expand **Policy Tables**, **Database Tables**, or **Notification Tables**.



3. Select (highlight) the table with which you want to work.

   The table appears in the details view of the Explorer.



To sort the table, click the appropriate column heading. Click the same heading a second time to reverse the sort order.

4. Change the table as needed:
   - "Add a table entry" on page 30
   - "Change a table entry" on page 30
   - "Reorder table entries" on page 31
   - "Delete a table entry" on page 32

   Note:
   All editing options may not be available for a specific table, and some tables cannot be modified in Polaris Administration.

5. Select **File**, **Save**.

   Note:
   It may be necessary to exit the Polaris staff client application and log back in to see the effects of some table changes.

Related Information

For information about specific tables, see "Administration Tables Reference" on page 260.

Work with policy tables on an organization workform

Follow these steps to access policy tables from an administration record workform.

Note:
You cannot access Database or Notification tables from a workform. Use the Administration Explorer to work with these tables. See "Work with tables from the Administration Explorer" on page 27.

1. Use one of the following methods to open the Polaris Find Tool:
   - Select **Administration**, ***Record Type*** on the Polaris Shortcut Bar. For example, to search for a branch record, select **Administration**, **Branch**.
   - If the Administration Explorer is open, select **File**, **Open** on the Administration Explorer menu bar, and specify the record type to find.

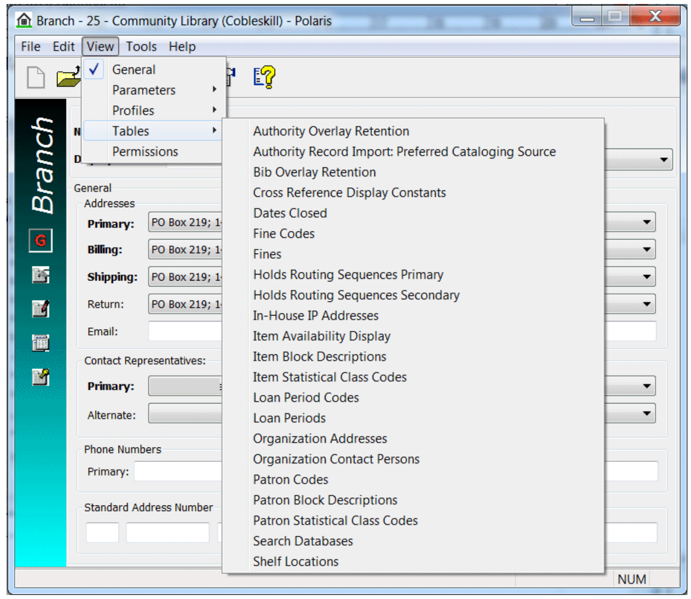
   The Polaris Find Tool opens.

2. Search for the administration record.
3. Right-click the record in the results list, and select **Open** from the context menu.

   The appropriate workform appears.

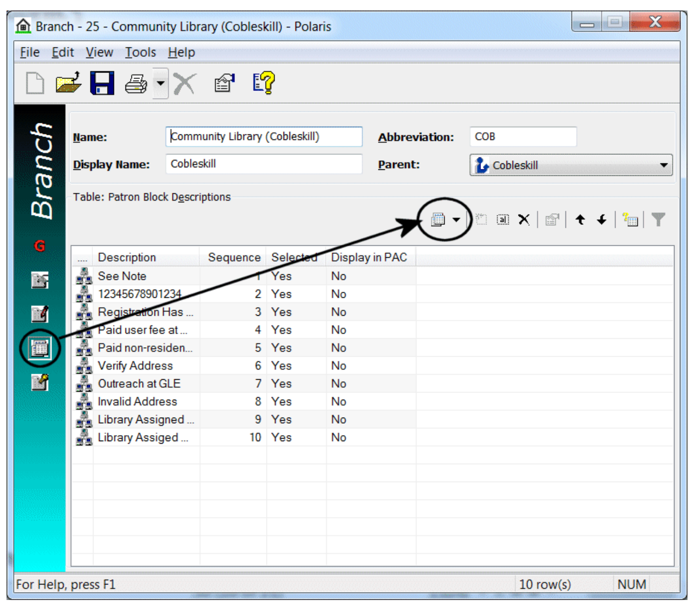
Tip:
Click to display the Tables list in the workform. Then click above the list, and select a table.

4. Select **View, Tables** to display the Tables menu.



5. Select a table from the Tables menu.

   The entries in the selected table display in the Table view of the workform.



6. Change the table as needed, and select **File, Save**.

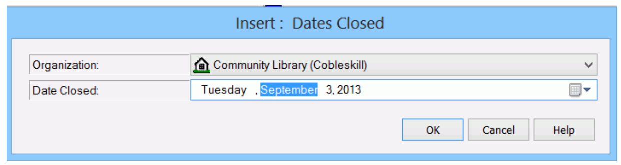
   Note:
   All editing options may not be available for a specific table.

Add a table entry

Follow these steps to add a new entry to a table.

Note:
Some tables cannot be modified in Polaris Administration. Notification tables are available at the system level only.

1. In the Administration Explorer, display the table at or above the organization level for the organization that needs the new entry.
2. Click  to display the Insert dialog box.



3. If the entry is specifically assigned to a branch, select the branch name in the **Organization** list.

   Note:
   If the table is opened at the branch level, only the branch name appears in the **Organization** list.

4. Type information in the other boxes as needed.
5. Click **OK**.

   The Insert dialog box closes and the new entry is listed in the policy table for the selected organization. **Modification Pending** appears in the status bar.

6. Select **File, Save**.

Change a table entry

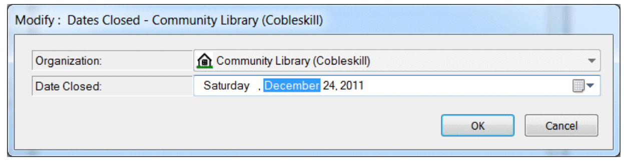
Follow these steps to change an entry in a table.

Note:
Some tables cannot be modified in Polaris Administration. For others, you can modify only some of the table fields. Notification tables are available at the system level only.

1. In the Administration Explorer, display the appropriate table at or above the organization level for the organization that needs the entry changed.
2. Select (highlight) the entry you want to change.
3. Click  to display the Modify dialog box.

   The dialog box title bar identifies the table. Table elements that cannot be changed are unavailable.

Tip:
To return to the table without changing the entry, click **Cancel** on the Modify dialog box.



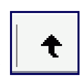
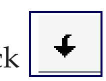
4. Change the available settings as needed.
5. Click **OK**.

   The Modify dialog box closes. The modified information is displayed in the table.

   Modification pending appears in the status bar.
6. Select **File**, **Save**.

Reorder table entries

For certain tables, the order in which entries appear in the table affects the operations controlled by the table. For example, the position of entries in the Holds Routing Sequences table determines the order in which hold requests are sent from one branch to the next. Follow these steps to reorder the entries in these tables.

1. In the Administration Explorer, display the appropriate table for the organization that needs the entry reordered.
2. Select (highlight) the entry you want to reposition.
3. Change the position of the entry using the following table toolbar buttons:
   - To move an entry up in the list, click .
   - To move an entry down in the list, click .

   Note:
   If the buttons are unavailable, you cannot change the order of the entries in the table.

   The order number value changes for the entry as you position the entry. **Modification pending** appears in the status bar.
4. Select **File**, **Save**.

Delete a table entry

You can delete a table entry only if no other Polaris record uses the entry. Follow these steps to remove an entry from a table.

Note:
Some tables cannot be modified in Polaris Administration. Notification tables are available at the system level only.

1. In the Administration Explorer, display the appropriate table at or above the organization level for the organization that needs the entry deleted.
2. Select (highlight) the table entry you want to delete.
3. Click to delete the highlighted entry.

   The **Deletion cannot be reversed, are you sure?** message box appears.
4. Click **Yes** to confirm that you want to delete the entry.

   The entry is removed from the table entries.
5. Select **File, Save**.

Setting Staff Client Profiles

Staff client profiles include settings for the following functions:

- **Cues to distinguish log-on servers** - See "Visual Cues for Staff Client Log-On Server" on page 35
- **Log-on with Windows Active Directory credentials** - See "Automatic Staff Client Log-On" on page 38
- **Automatic locale/time consistency checks** - See "Ensuring Locale and Time Consistency" on page 191.
- **Default settings for the Polaris Find Tool** - See "Setting Find Tool Profiles" on page 199.
- **Preferred Item Record and Patron Status workform views** - See "Setting Preferred Workform Views" on page 203.
- **Definitions for item and patron barcodes** - See "Defining Barcode Formats" on page 217.
- **Label printing defaults** - See "Setting Up Labels" in the *Polaris Cataloging Guide 4.1R2*.
- **Receipt printer settings** - See "Set receipt printer control codes" in the *Polaris Patron Services Administration Guide 4.1R2*
- **Location of online documentation** - See "Defining Online Documentation" on page 228.
- **Starting and stopping security history** - See "Managing Organization Security" on page 114.
- **Specifying servers for reporting services** - See "Specifying Report Servers" on page 185.

In general, you can set staff client profiles at the system, library, branch, workstation, and staff member levels, although certain staff client profiles are not available at all levels. Settings for organization levels define the default profile settings for subordinate organizations, workstations, and staff members. Each level can have a different setting. If a staff client profile is not set at a particular level, the setting from the level above it is used. You can set staff client profiles from the Administration Explorer or from an administration workform.

See the following topic:

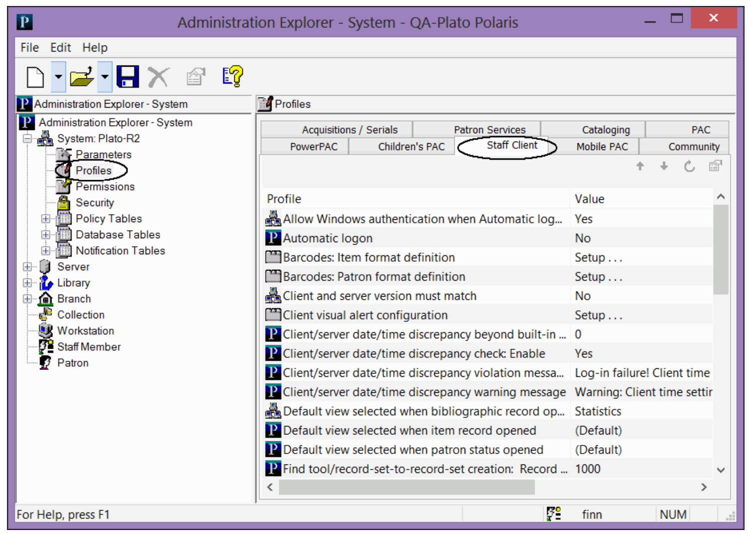
- "Set staff client profiles" on page 34

Set staff client profiles

Follow these steps to set staff client profiles.

1. In the Administration Explorer tree view, select **Profiles** for the organization, workstation, or staff member, and select the **Staff Client** tab in the details view.

   Note:
   For more information about listing workstations and staff members in the Explorer, see "List workstations in the Explorer" on page 89 and "List staff members in the Explorer" on page 98.



2. Select and edit the profile you want to change.
   - For general editing methods, see "Setting Parameters and Profiles" on page 15.
   - For summary information about specific staff client profiles, see "Staff Client Profiles Reference" on page 254.

3. Select **File, Save** to save your changes.

   Record(s) saved appears in the status bar.

   Note:
   To see the effects of some changes in the staff client application, you may need to exit the staff client application and log back in.

Visual Cues for Staff Client Log-On Server

You can set a message to alert the user that he or she is attempting to log on to the staff client on the training server, and once the user has logged on, to indicate the log-on server through custom colors on the title bars of staff client workforms. The user can do such tasks as comparing data from a production and a training environment, easily identifying the data from each client. For example, the user may wish to display parallel workforms from both servers, so that Polaris Administration settings and data can be copied from one to the other.

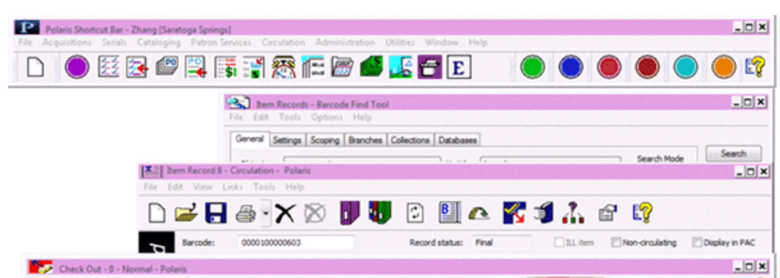
Note:
These features were developed for use on training or non-production servers, but they are not limited to that situation. You can set the options described in this section on any Polaris application server.

You can set an alert message, custom colors, or both features. Your settings override the workstation's Windows display settings because the purpose is to alert the user that he or she is logged into a "special use" server.

When you set custom colors, they appear on the Polaris Shortcut bar and workforms, all dialog boxes, the Report Manager, and the Label Manager. The custom colors override any Windows themes such as color and transparency. The illustration shows some examples of Polaris workforms using the default custom color:

See the following topic:

- "Set visual cues for the log-on server" on page 36

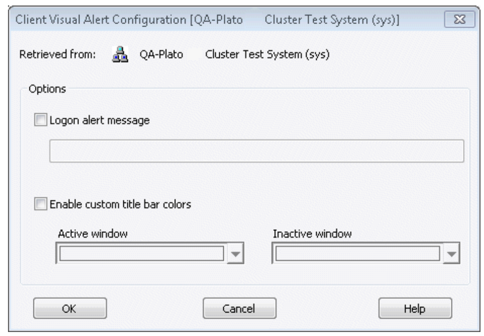


Set visual cues for the log-on server

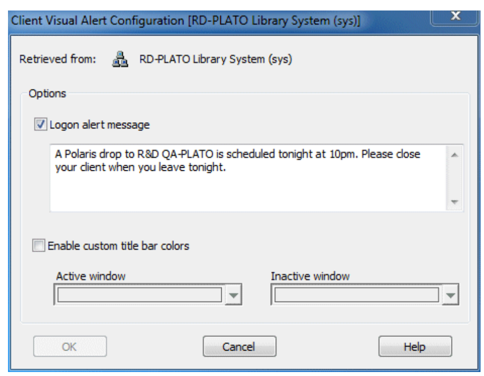
Follow these steps to set a log-on alert message, custom title bar colors, or both features.

1. On the training server or other non-production server (or any Polaris application server where you want to use these features), in the Administration Explorer tree view, select **Profiles** for the system, and select the **Staff Client** tab in the details view.
2. Double-click **Client visual alert configuration.**

   The Client Visual Alert Configuration dialog box opens.



3. To specify an alert message, check **Logon alert message** and type the message (255 character maximum) in the field just below the alert message option.

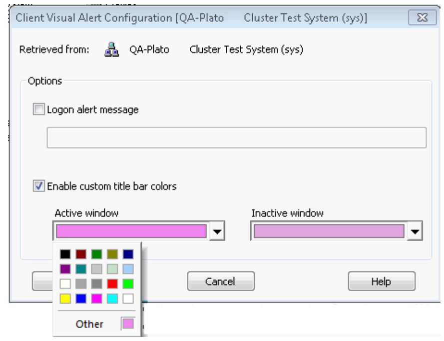


Note:
To clear a previous set message, clear the **Logon alert message** check box.

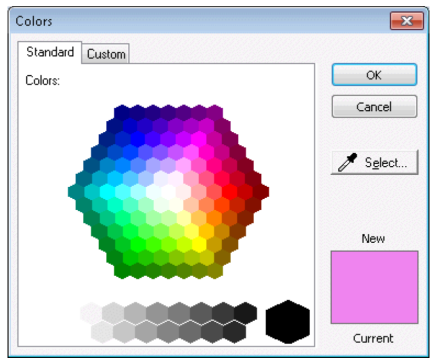
4. To use custom colors for the Polaris workform title bars, check **Enable custom title bar colors**.

   You can use the default violet and plum for the active and inactive windows, or specify custom colors. To specify your own custom colors, follow these steps:

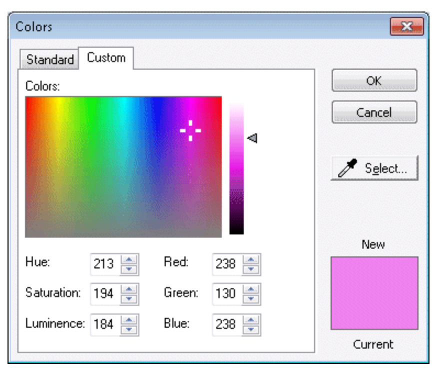
   a) Select the drop-down arrow for the **Active window** or **Inactive window** to access the color picker.



b) Click a color, or click **Other** to open the color tool.



- To select a color on the Standard tab of the color tool, click **Select** and click a color or gray-scale value.
- Or click the Custom tab to select a color from a continuous palette. Alternatively, you can type standard RGB values.



5. Click **OK** to close the color tool.

6. Click **OK** to close the Client Visual Alert Configuration dialog box.

Important:
After you have set an alert message and/or custom colors, you must log off the Polaris staff client and log on again for the changes to take effect.

Automatic Staff Client Log-On

You can set a staff client workstation for automatic log-on to the Polaris staff client using Windows Active Directory integrated security. The workstation can be set to log in to the workstation's parent branch, or it can be set so that the user can select a branch.

When the **Automatic logon** Staff Client profile is set to **Yes** for the workstation, the Windows-authenticated user is logged directly into the staff client on that workstation. If the branch-level **Logon branch: Access** permission is not set for the workstation, the user is automatically logged on to the workstation's parent branch. If the branch-level **Logon branch: Access** permission is set for the workstation, the user can select a log-on branch.

The Polaris Log On dialog box is not displayed. If it is necessary to work offline, the staff member selects **File, Log Off** from the Shortcut Bar. The staff member then selects **File, Log On** to display the Log On dialog box, where the staff member can supply Polaris log-on credentials and select the **Work offline** check box.

The **Work offline** option is also automatically offered when a connection cannot be made to the application server. For more information about working offline, see "Managing Offline Circulation" in the *Polaris Patron Services Administration Guide 4.1R2*.

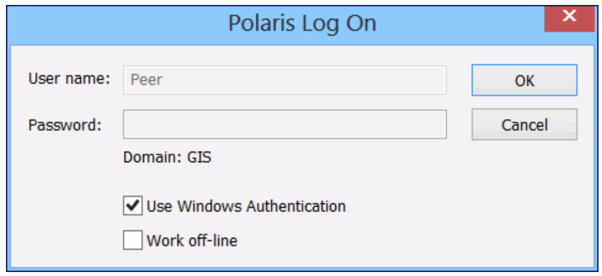
Note:
When **Automatic logon** is enabled, any user in the Polaris staff client application can select **File, Logoff** on the Shortcut Bar (or press **CTRL+L**). They can then select **File, Logon** (or press **CTRL+L**) to display the Polaris Log On dialog box, and log in as another user.

See the following topic:

- "Windows Authentication Without Automatic Logon" on page 39

Windows Authentication Without Automatic Logon

The Staff Client profile **Allow Windows authentication when Automatic logon is not enabled** provides integrated security *without* automatic logon. This setting displays the Polaris Log On dialog box to users who want to log on more quickly but may sometimes need to log on with different credentials. The profile is available at the system, library, branch, and workstation levels. When the profile is set to **Yes**, the user can check **Use Windows Authentication** on the Log On dialog box. The **Name**, **Password**, and **Domain** fields are then grayed out, and clicking **OK** logs the user on with Windows credentials.



Important:
If the **Automatic Logon** profile is set to **Yes** for a workstation, no one else can log on to that workstation using their own credentials because the log-on dialog box does not appear.

Or, the user may choose to leave **Use Windows Authentication** unchecked, and log on with their own or other Polaris credentials.

Related Information

- **Logon branch access permission** - See "Special Permissions for Rotating Staff" on page 111.
- **Automatic logon and PCI compliance** - The library may be required to meet PCI compliance for credit card processing. If so, you must require unique domain user IDs in single-domain networks and follow secure authentication best practices to log on to the workstation, since the automatic log-on feature restricts staff client use to the Windows-authenticated user on the workstation. A generic Windows log-on such as Circ1 would be out of compliance because it would not be possible to trace the transaction back to the staff member who performed it. Library policy also determines PCI compliance. When automatic logon is enabled and another staff user needs to work in the staff client on the same workstation, the library must require that the original user log off the workstation; the new user must log on with their own Windows credentials. For more information about PCI compliance, see the *Polaris E-Commerce Data Security Standard (PA-DSS/PCI-DSS) Implementation Guide*, available on the Customer Extranet.

Setting Up Organizations

This unit contains information about setting up basic information for the system, libraries, and branches in Polaris Administration.

See the following topics:

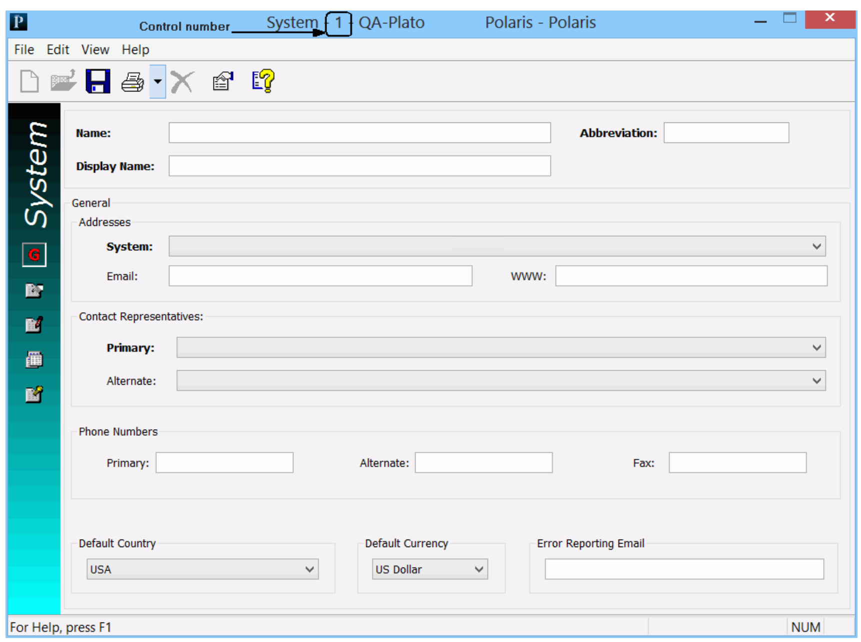
Changing System Information

Information about your Polaris system is stored in the system record, which is created upon initial Polaris installation. The system record is the top level of the Polaris administration hierarchy. It may represent an organization or consortium with up to 1,000 branches, all sharing the same Polaris installation, or it may represent a single library.

You can change many system settings from either the System workform or the Administration Explorer, although most database tables are set using the Administration Explorer. The system record cannot be deleted.

The system record specifies the following information in the Polaris system:

- **Control number** - The unique record identification number assigned to the organization record and displayed in the workform title bar. This number is used in Polaris code and for special purposes. For example, if you run reports from Reporting Services, you specify an organization filter by control number. The system organization control number is always 1.



- **Name of the library system** - The full name, abbreviation, and the display name of the library, cooperative, or consortium that owns and administers the system for all organizations using this installation of Polaris.

- **Address and contact information** - The postal address of the central office, and contact information for the system director or Polaris administrator. These are initially defined in the organization address and contact tables. See "Setting System Postal Codes" on page 60, "Setting Organization Addresses" on page 66, and "Identifying Organization Contacts" on page 68.
- **Default country and currency** - The default country and the main currency that is used throughout the library system. The default is U. S. dollars. You can specify other currencies to use when ordering materials from foreign vendors. See "Administering Foreign Currencies" in the *Polaris Acquisitions Guide 4.1R2*.
- **Permissions** - In general, Polaris permissions set at the system level apply only to records that belong to the system organization. Organizations at lower levels must define their own permissions settings. However, the **Allow** permissions set with the Security view at the system level are applied to all workstations and staff members in Polaris. See "Granting Permissions" on page 106.
- **Parameters, profiles, policies, and database tables** - If set at the system level, the settings are inherited by or used as the basis for settings at subordinate organizations. Some settings are available only at the system level.

See the following topic:

- "Change the system record" on page 42

Change the system record

Follow these steps to change the system record.

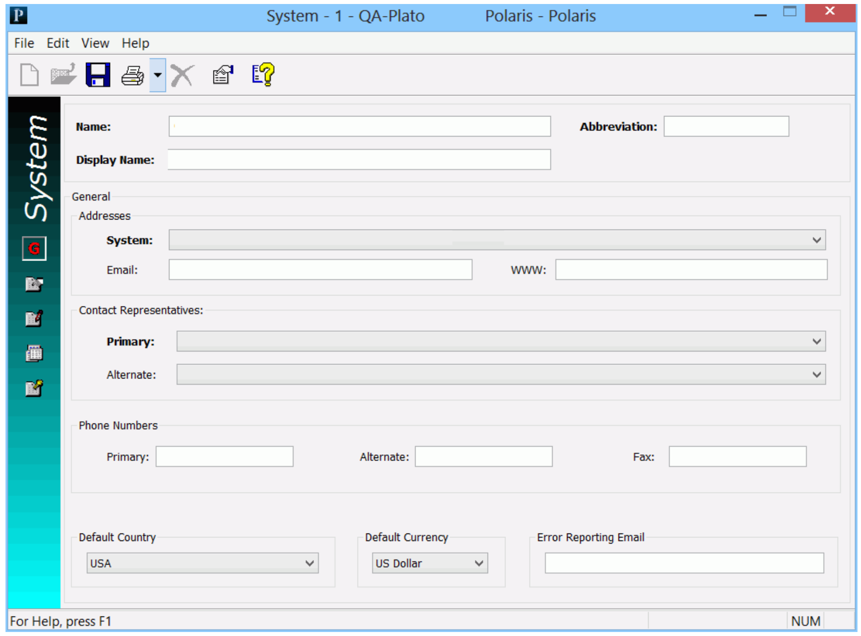
> **Note:**
> Address and contact information must be defined in the appropriate tables before you can specify them in the system record. See "Setting Organization Addresses" on page 66 and "Identifying Organization Contacts" on page 68.

1. Select **Administration**, **Explorer**, **System** on the Polaris Shortcut Bar.

   The Administration Explorer appears.

2. Right-click **System** in the tree view of the Administration Explorer, and select **Edit** from the context menu.

   The System workform appears.



3. Change the system registration information as needed by typing in the text boxes or making selections in the list boxes.

   Note:
   The name you specify in the **Display Name** box identifies the organization in the workform title bar and in Mobile PAC. On the Polaris Shortcut bar, the display name of the logged-in workstation's parent organization appears in the title bar and in the About Polaris window (Help menu).

   Important:

   These characters cannot be used in the **Name** or **Display Name** fields:

   ; (semi-colon)
   ? (question mark)
   : (colon)
   @ ('at' sign)
   & (ampersand)
   = (equals sign)
   + (plus sign)
   $ (dollar sign)
   , (comma)
   \ (back slash)
   * (asterisk)
   < (less than sign)
   > (greater than sign)
   | (vertical pipe)
   " (double quote)
   / (forward slash)

4. To set up error reporting, in the **Error Reporting Email field**, type the e-mail address of the administrator who should receive the report of a system error.

You can use error reporting to identify workstations that have stopped functioning due to unhandled exceptions. If you use Polaris ExpressCheck and credit card processing, an error report is sent if a credit card refund is not successful when a lost or billed item charge needs to be resolved. Your error reporting settings at the system level are inherited by libraries and branches unless you change the settings at those levels.

5. Select **File, Save** to save your changes.
6. Edit system-level permissions, profiles, parameters, and tables as needed. See the "Related Information" section.

Related Information

For more information about setting up and administering Polaris, see the following topics:

- **Editing administration settings (general procedures) -** See "Setting Parameters and Profiles" on page 15 and "Working with Tables" on page 24.
- **Adding workstation and staff member records -** See "Setting Up Workstation and Staff Member Records" on page 84.
- **Setting permissions** - See "Managing Organization Security" on page 114.
- **Setting schedule information** - See "Identifying Dates Closed" on page 70.
- **Recording system events** - See "Collecting Transaction Statistics" on page 207.
- **Acquisitions settings** - Certain settings, such as standard claim reasons, currencies, standard fund categories, and supplier links, are made at the system level and apply to all organizations. Others can be set at the library or branch levels. For more information, see the "Acquisitions Administration" in the *Polaris Acquisitions Guide 4.1R2*.
- **Cataloging settings** - Certain settings, such as MARC validation criteria and bibliographic deduplication criteria, are made at the system level and apply to all organizations. Others can be set at the library or branch levels. For more information, see the "Cataloging Administration" in the *Polaris Cataloging Guide 4.1R2*.
- **Circulation and patron services settings** - Certain settings, such as material types, fines and fees categories, patron block descriptions, patron code descriptions, and the standard reasons a hold request cannot be filled, are made at the system level and apply to all organizations. Others can be set at the library or branch levels. For more information, see the *Polaris Patron Services Administration Guide 4.1R2*.
- **Notification tables** - Settings in these tables affect telephone notification. They are made at the system level. For more information, see the *Polaris Telephony Administration Guide 4.1*.

- **Public access settings** - See "Controlling Database Access in the Staff Client" on page 178, "Defining Leading Articles" on page 193, "Setting Language Display" on page 196, and the *Polaris Public Access Administration Guide 4.1R2*.
- **System organization properties** - The system property sheet shows summary information about the system, including the number of libraries, branches, accessible remote servers, accessible remote databases available to the branch in the staff client and in PAC, collections, workstations, staff members, and registered patrons. To open the property sheet, right-click the system name in the Administration Explorer and select **Properties**, or click the Properties icon  on the System workform.

Working with Libraries

The library record is the second level in the Polaris Administration hierarchy. It may represent an institution that directs one or more branches, and it may or may not have a physical location. All branches, collections, workstations, and staff members that belong to a library are directly or indirectly linked to the “parent” library record.

Examples:

1. A Polaris system with one physical location where materials are circulated has two Administration records—one library record and one branch record—because circulation activities and patron registrations are associated with branch records, and every branch record must have a parent library.

2. A Polaris system with one main library and three branches (four physical locations where materials are circulated) has five Administration records—a library record and four branch records (one branch record for each physical repository).

You add a library record or edit library information using the Library workform, and you can delete a library record. You can also edit profiles, parameters, permissions, and tables associated with a library record directly from the Administration Explorer tree view, by expanding the appropriate folders beneath the library name. Address or contact changes are immediately effective. Other changes to a library record are not effective until the record is saved.

Polaris policy, parameter, and profile settings at the library level are inherited from the settings made at the system level. Each library in the Polaris system may change the settings to match its local requirements. Changes made at the library level are inherited by the branch levels that belong to the library. However, permissions for a library apply only to the library. Permissions must also be set for each branch record associated with the library.

See the following topic:

- “Register a library in Polaris” on page 47

Register a library in Polaris

Follow these steps to add the library record to Polaris.

Note:
Address and contact information must be defined in the appropriate tables before you can specify them in the library record. See “Setting Organization Addresses” on page 66 and “Identifying Organization Contacts” on page 68.

Important:
If you have deleted a library and are setting up a new one, you may have difficulty matching settings such as item statistical codes. In this situation, contact your Polaris Site Manager for assistance. Fees may apply.

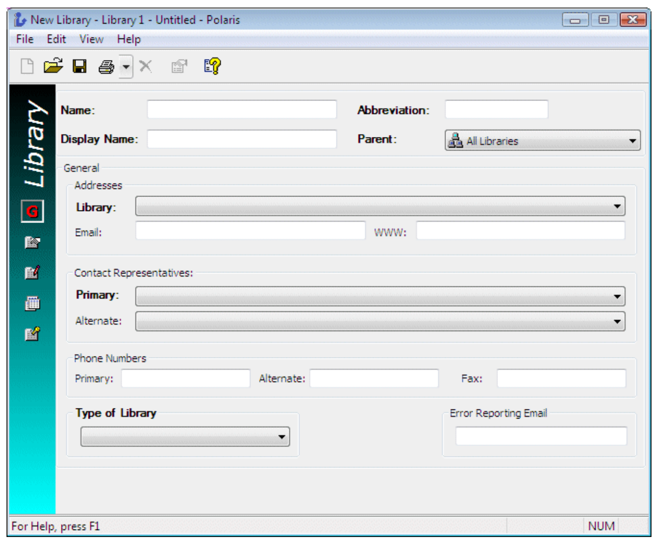
1. Select **Administration**, **Explorer**, **System** on the Polaris Shortcut Bar.

   The Administration Explorer appears.

2. Select **File, New, Library** from the Administration Explorer menu bar.

   The Library workform appears.

Tip:
You can also right-click an existing library listed in the Administration Explorer tree view, and select **New** from the context menu.



3. Type the library name in the **Name** box.

4. Type the abbreviation for the library name in the **Abbr** box.

5. In the **Display Name** box, type the name you want to be displayed for this organization.

   This name identifies the organization in the workform title bar and in Mobile PAC. On the Polaris Shortcut bar, the display name of the logged-in workstation’s parent organization appears in the title bar and in the About Polaris window (Help menu).

Note:
These characters cannot be used in the Name or Display Name fields:

; (semi-colon)
? (question mark)
: (colon)
@ ('at' sign)
& (ampersand)
= (equals sign)
+ (plus sign)
$ (dollar sign)
, (comma)
\ (back slash)
* (asterisk)
< (less than sign)
> (greater than sign)
| (vertical pipe)
" (double quote)
/ (forward slash)

6. Select the parent system organization in the **Parent** box, if it is not already selected.
7. Select the street address in the **Library** box, and type the e-mail and URL addresses in the **Email** and **WWW** boxes.
8. Select the library staff to contact in the **Primary** and **Alternate** boxes.
9. Type the library office phone and fax numbers in the **Phone Numbers** boxes.
10. Select the type in the **Type of Library** box.
11. To set up error reporting, in the **Error Reporting Email field**, type the e-mail address of the administrator who should receive the report of a system error.

    You can use error reporting to identify workstations that have stopped functioning due to unhandled exceptions. If you use Polaris ExpressCheck and credit card processing, an error report is sent if a credit card refund is not successful when a lost or billed item charge needs to be resolved. Your error reporting settings at the system level are inherited by libraries unless you change the settings at this level.
12. Select **File, Save** to save your changes.
13. Edit library-level permissions, profiles, parameters, and tables as needed. See the “Related Information” section.

Related Information

- **Register a branch for the library** - See “Working with Branches” on page 50.
- **Editing administration settings (general procedures)** - See “Setting Parameters and Profiles” on page 15 and “Working with Tables” on page 24.
- “Setting Up Workstation and Staff Member Records” on page 84

- **Setting permissions** - See "Managing Organization Security" on page 114.
- **Setting schedule information** - See "Identifying Dates Closed" on page 70.
- **Acquisitions settings** - See the "Acquisitions Administration" in the *Polaris Acquisitions Guide 4.1R2*.
- **Cataloging settings** - See the "Cataloging Administration" in the *Polaris Cataloging Guide 4.1R2*.
- **Circulation and patron services settings** - See the *Polaris Patron Services Administration Guide 4.1R2*.
- **Public access settings** - See the *Polaris Public Access Administration Guide 4.1R2*.
- **Library organization properties** - The library property sheet shows summary information about the library, including the number of branches, accessible remote servers, accessible remote databases available to the branch in the staff client and in PAC, collections, workstations, staff members, and registered patrons. To open the property sheet, right-click the library name in the Administration Explorer and select **Properties**, or click the Properties icon  on the Library workform.

Working with Branches

Branch records are at the third level of the Polaris Administration hierarchy. They represent the physical repositories where patrons check in and check out books and other material. Each branch record must be associated with a parent library record.

You add a branch or change branch information using the Branch workform. You can also edit profiles, parameters, permissions, and tables for the branch directly from the Administration Explorer tree view, by expanding the appropriate folders beneath the branch name. Address or contact changes are effective immediately. Other changes to a branch record are not effective until the record is saved.

Important:
If you change the parent library for the branch, be sure to review the permission, parameter, and profile settings for the branch and new parent library. Some settings are inherited from parent organizations and may change the way functions have worked previously for the branch. A branch that has the same name as a library administration record should always have that library as the parent.

See the following topics:

- "Setting Up a Digital Branch for Integrated Econtent" on page 50
- "Register a branch" on page 51

Setting Up a Digital Branch for Integrated Econtent

If multiple libraries in your system use the same Vendor Account (contract) for API-driven import processing (such as that used for integrated 3M econtent, Polaris recommends that you set up a digital branch to represent the account. The digital branch will ease processing when automatically importing MARC records via the API-driven import, where a vendor account is associated with a single import profile and a single item template. Since the import profile specifies a record set and the item template specifies an assigned branch, associating those fields with a single digital branch prevents the need for extensive bulk changes once the item records are created. Multiple digital branches, one per multi-library vendor contract, can be created if necessary. In PAC, the materials associated with the digital branch are available according to the branch's resource group membership.

Important:
If you plan to use a digital branch, the branch must be set up in Polaris before you activate the vendor account and start the API Consumer Service.

Note that if only one library is involved in the contract, a digital branch is not needed. All the ebook item records are assigned to that library.

Related Information

- **Resource groups** - "Setting Up Organization Resource Groups" on page 56
- **Vendor accounts** - "Implementing Ebook Vendors" in the *Polaris Cataloging Guide 4.1R2*
- **Importing integrated econtent** - "Importing Integrated Ebook Bibs" in the *Polaris Cataloging Guide 4.1R2*
- **PAC display and circulation for econtent** - "Integrated Econtent in PAC" in the *Polaris Public Access Administration Guide 4.1R2*

Register a branch

Follow these steps to add a branch to Polaris.

Note:
Address and contact information must be defined in the appropriate tables before you can specify them in the branch record. See "Setting Organization Addresses" on page 66 and "Identifying Organization Contacts" on page 68.

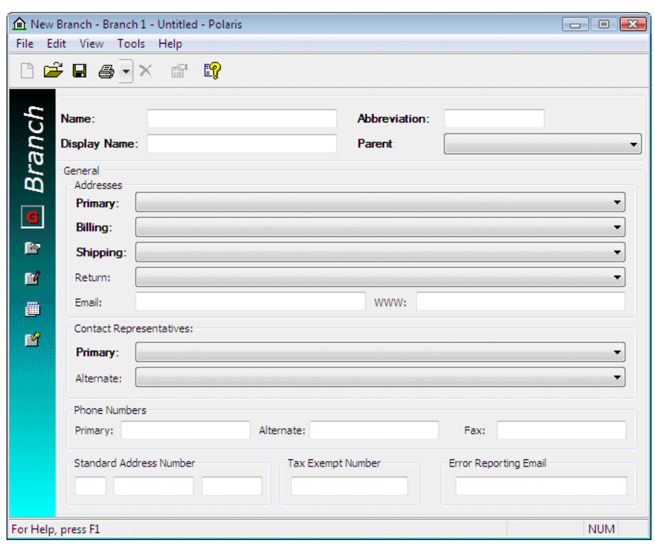
Important:
If you have deleted a branch and are setting up a new one, you may have difficulty matching settings such as item statistical codes. In this situation, contact your Polaris Site Manager for assistance. Fees may apply.

1. Select **Administration**, **Explorer**, **System** on the Polaris Shortcut Bar.

   The Administration Explorer appears.

2. Select **File, New, Branch** on the Administration Explorer menu bar.

   The Branch workform appears.



3. Type the formal name of the branch in the **Name** box.

4. Select the library organization to which the branch belongs in the **Parent** box.

   A branch that has the same name as a library administration record should have that library as the parent.

Tip:
In Administration boxes where the options are marked with an organization icon, such as the **Parent** box, you can type the first letter of an organization name and that organization is chosen. If multiple selections begin with the same letter, keep typing the letter to cycle through the choices.

5. Type the abbreviation of the branch name in the **Abbr** box.

   Important:
   If you use enriched EDI ordering and shelf-ready cataloging with Baker & Taylor, the branch abbreviation is limited to 5 characters or fewer to comply with this vendor's data requirements.

6. In the **Display Name** box, type the name you want to appear in the workform title bar and on the Polaris Shortcut bar, where the name appears as the parent organization of the logged-in workstation.

   This name is also used in Mobile PAC and text message hold notices.

   Note:
   These characters cannot be used in the Name or Display Name fields:

   ; (semi-colon)
   ? (question mark)
   : (colon)
   @ ('at' sign)
   & (ampersand)
   = (equals sign)
   + (plus sign)
   $ (dollar sign)
   , (comma)
   \ (back slash)
   * (asterisk)
   < (less than sign)
   > (greater than sign)
   | (vertical pipe)
   " (double quote)
   / (forward slash)

7. Select the appropriate addresses for the branch in the following boxes:
   - **Addresses Primary** - Select the main mailing address for the branch.
   - **Billing** - Select the address where invoices and other billing information should be mailed. This address is used on purchase orders created in Polaris.
   - **Shipping** - Select the address where packages and other bulk shipments for the branch should be sent, typically the address for a receiving department at the library or branch. This address is used on purchase orders created in Polaris.

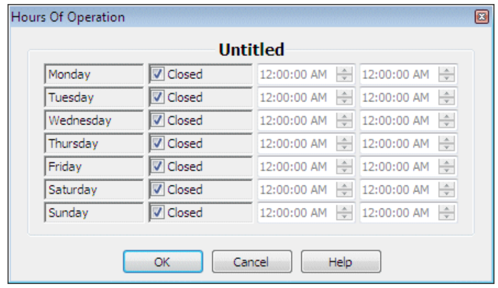
Tip:
In Administration boxes where the options are not marked with an organization icon, such as the **Addresses** boxes, you can type the first letter or number of an option and that option is chosen. If multiple options begin with the same character, type the first two or three characters.

8. Type the e-mail and URL addresses in the **Email** and **WWW** boxes.
9. Select the branch staff to contact in the **Primary** and **Alternate** boxes.
10. Type the library office phone and fax numbers in the **Phone Numbers** boxes.

11. Define the normal hours of operation for the branch by following these steps:

a) Select **Tools, Define Hours of Operation**.

The Hours of Operation dialog box opens.



b) Clear the **Closed** check box for each day of the week that the branch is open.

The opening and closing time boxes become available for each open day.

c) Set the appropriate opening and closing times. Select the hours, minutes, seconds, and AM/PM fields, and type the appropriate entry or use the up and down arrows to set the field. Then click **OK**.

> **Note:**
> Once the branch is set up, you can edit the normal hours of operation using this method, or with the Patron Services parameter **Hours of Operation** for the branch. To set specific *dates* closed, such as January 1, 2012, see "Identifying Dates Closed" on page 70.

12. Complete the following optional information according to your library policies:

- **Standard Address Number** - If the branch has a registered SAN, type the number.

  > **Important:**
  > If you use EDI for acquisitions, the SAN number is essential for the correct processing.

- **Tax Exempt #** - If the branch does not have to pay sales taxes, type the registered exemption number.

13. To set up error reporting, in the **Error Reporting Email field**, type the e-mail address of the administrator who should receive the report of a system error.

You can use error reporting to identify workstations that have stopped functioning due to unhandled exceptions. If you use Polaris ExpressCheck and credit card processing, an error report is sent if a credit card refund is not successful when a lost or billed item charge needs to be resolved. Your error reporting settings at the system and library level are inherited by branches unless you change the settings at this level.

14. Select **File, Save** to save the branch record.

    Record saved appears in the status bar.

15. Edit branch-level permissions, profiles, parameters, and tables as needed. See the "Related Information" section.

Related Information

- **General information about how to edit administration records** - See "Setting Parameters and Profiles" on page 15 and "Working with Tables" on page 24.
- "Setting Up Workstation and Staff Member Records" on page 84
- **Setting permissions** - Permissions must be set explicitly for the branch. See "Managing Organization Security" on page 114.
- **Setting specific dates closed** - See "Identifying Dates Closed" on page 70.
- **Collections** - If this branch uses collections, see "Working with Collections" on page 75.
- **Acquisitions settings** - See the "Acquisitions Administration" in the *Polaris Acquisitions Guide 4.1R2*.
- **Cataloging settings** - Certain settings, such as tags to retain for overlaid bibliographic and authority records and preferred cataloging sources, are made at the branch level. For more information, see the "Cataloging Administration" in the *Polaris Cataloging Guide 4.1R2*.
- **Circulation and patron services settings -** Many settings, such as fines and fees, loan periods, item blocks, and holds routing, are made at the branch level. For more information, see the *Polaris Patron Services Administration Guide 4.1R2*.
- **Statistical reporting** - If the branch does statistical reporting, specify the item and patron statistical categories. See "Setting Statistical Codes for Reports" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Search databases in the staff client and public catalog** - See "Controlling Database Access in the Staff Client" on page 178 and "Managing Federated Search Targets" in the *Polaris Public Access Administration Guide 4.1R2*.
- **Display characteristics in the public catalog** - Many settings, such as the bibliographic information displayed in search results, the item holdings display, cross-reference terms, and shelf locations, are made at the branch level. For more information, see the *Polaris Public Access Administration Guide 4.1R2*.

- **Suppressing a branch from display in PAC** - Use the system-level PAC profile **Suppress branches** to select branches to suppress from list displays in PAC. This is useful if you have a branch set up strictly for administrative purposes. For Polaris PowerPAC, the selected branches are suppressed from the connection branch list (**Switch to another branch**), the list of branches on the Search Options scoping page, and the list of branches on the donations page. For Mobile PAC, this profile suppresses selected branches from the drop list of organizations on the Library Hours page and the Mobile PAC Preferences page.

  Note:
  Use the Request parameter **Holds options** (Pickup tabbed page) to include or suppress the branches available as pick-up library choices for hold requests placed through PAC.

- **Branch properties** - The branch property sheet shows summary information about the branch, including the number of accessible remote databases available to the branch in the staff client and in PAC , collections, workstations, staff members, and registered patrons. To open the property sheet, right-click the branch name in the Administration Explorer and select **Properties**, or click the Properties icon  on the Branch workform.

Setting Up Organization Resource Groups

You can associate selected organizations as Resource Groups, and make remote and federated databases and other resources available to PAC users based on the organization resource group. For example, resource groups can be used to expose or suppress specific databases from federated database searches, and to filter the display of ebook bibliographic records. If there is no resource group associated with a resource such as a database, access to that resource is not restricted.

Note:
Organizations that share one vendor contract for econtent may wish to set up a digital branch for the content and assign that branch to a resource group. For more information, see "Setting Up a Digital Branch for Integrated Econtent" on page 50.

Use the Resource Group workform to create Resource Groups and assign organizations to them. One organization can belong to multiple Resource Groups. You need the following system-level System Administration permissions to work with Resource Groups:

- **Resource Group: Access**
- **Resource Group: Create**
- **Resource Group: Modify**
- **Resource Group: Delete**

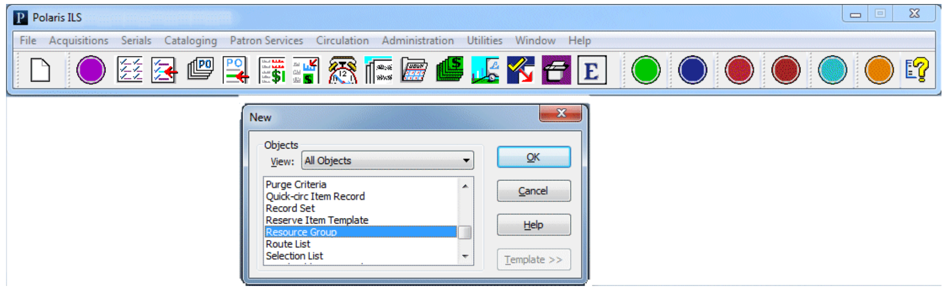
See the following topic:

- "Set up a new Resource Group" on page 57

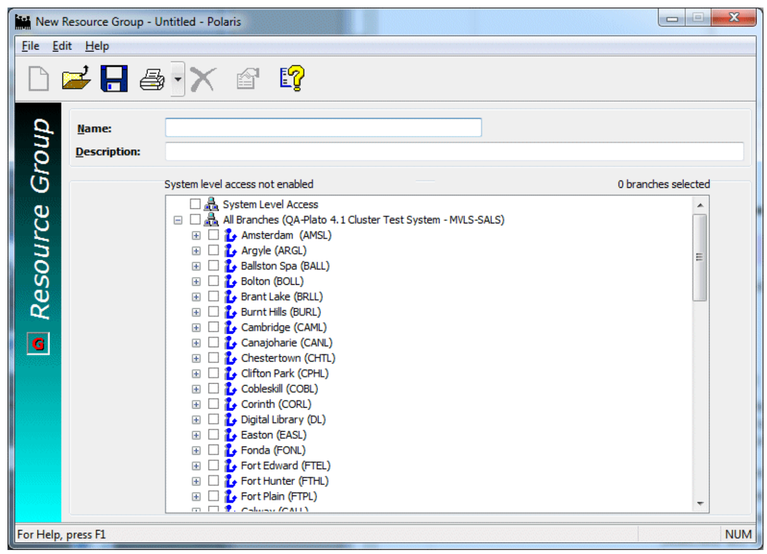
Set up a new Resource Group

Follow these steps to create a new Resource Group.

1. Select **File, New** from the Polaris Shortcut Bar, and select **Resource Group** from the New dialog box.



The Resource Group workform opens.



2. Specify a name and description for this resource group.

   The name must be unique. Consider a naming convention that distinguishes Resource Groups by purpose; for example, Resource Groups that are used for federated databases and Resource Groups that will be used for e-books.

3. Specify the organizations that should belong to this Resource Group as follows:

   - Select **System Level Access** to give PAC users access to the resources associated with this Resource Group when the PAC connection organization is the system.

- Select **All Branches** to automatically check all branches. Resources with which this Resource Group is associated are available when the PAC connection organization is any library-level organization or any branch-level organization. Typically, it is not necessary to select all branches; if access is not restricted, a resource group is not necessary. However, you can use this option to select all branches and then de-select specific branches in the list. The **All Branches** check box is gray when some but not all organizations are selected.
- Select a library organization check box to select the branches associated with the library. PAC users connected to any of the selected library's branches have access to the resources (databases) associated with the resource group.
- Expand the library organization, and select individual branches. PAC users connected at any of the selected branches have access to the resources (databases) associated with the resource group.

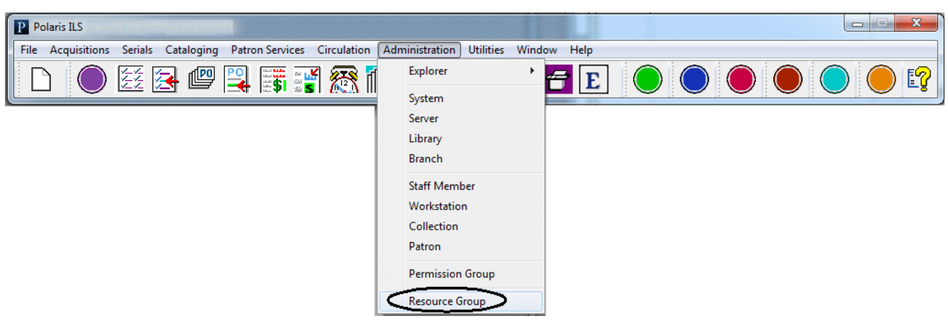
You must select at least one organization to save the Resource Group record.

If the PAC connection organization is a member of this Resource Group, the resources associated with the group are accessible in Polaris PowerPAC, subject to your PAC display and usage condition settings. For information about associating resources with resource groups, see "Registering Remote Resource Servers" on page 166.

4. Click the Save icon or select **File, Save**.

Related Information

- **Find a Resource Group** - To open a Resource Group Find Tool, select **Administration, Resource Group**. You can search by **Name** or **Description** and limit the search by organization.



- **Create a new Resource Group from an existing Resource Group** - Select **File, New** from the open Resource Group workform, and select **Clear Work Form** or **Copy Existing Work Form**. The **Clear** option opens a new Resource Group with all settings cleared. The **Copy** option opens a new workform that retains the settings of the original workform.

- **Delete a Resource Group** - Right-click the Resource Group in the Find Tool results list and select **Delete** from the context menu, or open the Resource Group workform and select **File, Delete**. A Resource Group cannot be deleted if it is associated with a server record (see “Registering Remote Resource Servers” on page 166).
- **Remove an organization from a Resource Group** - Clear the check box for the organization in the Resource Group workform. If the resource group is associated with one or more databases (see “Registering Remote Resource Servers” on page 166), users connected to that organization will not be able to access the database(s), and the Report of Unavailable Targets dialog box appears. The dialog box lists the database display name defined for PAC (the organization-level name or system-level name, if none is defined for the organization), the server display name, and the organizations affected. If you continue to save the record, the database is removed from PAC display (if it has been selected for display) for every organization indicated in the report where there is no inheritance. The database may still be available for a parent organization. For more information about setting up the target display for PAC, see “Managing Federated Search Targets” in the *Polaris Public Access Administration Guide 4.1R2*.
- **Remote databases accessible to a specific branch** - The Branch property sheet shows the number of accessible remote databases available to the branch in the staff client and in PAC. To open the property sheet, right-click the branch name in the Administration Explorer and select **Properties**, or click the Properties icon  on the Branch workform.

Setting System Postal Codes

In organization workforms and throughout Polaris, whenever you need to enter an address, you simply select a country (U.S. or Canada) and type a valid postal code. The **City** and **State/Province boxes** are filled in automatically. The postal codes are defined and maintained with two tables that you can access from the Administration Explorer:

Note:
You can work with these tables at the system, library, or branch levels. Changes made at any level are applied to all organizations in Polaris.

- **Countries policy table** - Defines the postal code length and styles for the countries in which the library sends mail.
- **Postal Codes database table** - When Polaris is installed, the Postal Codes database table contains the current Zip codes defined by the United States Postal Service. Canadian postal codes are installed at implementation for Canadian customers.

Note:
If your library is in the U.S. but you need Canadian postal codes, contact your Polaris Site Manager. You must be using Polaris version 3.5 or later.

See the following topics:

- "Invalid Postal Codes Report" on page 60
- "Additions to the Postal Codes Table from Polaris Records" on page 61
- "Add a postal code format" on page 61
- "Add a postal code" on page 63

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. For more information on running reports, see "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*.

Additions to the Postal Codes Table from Polaris Records

Staff members who have the Circulation permission **Patron registration: Modify postal address fields** can also enter a new city/country postal code combination for a U.S. or Canadian address when creating or editing patron records in the staff client, and the new combination is added to the Postal Codes database table when the record is saved. Staff members without this permission can edit street addresses or select a different (but existing) postal code/city/state/country combination in a patron record.

Note:
The permission is not checked during offline patron registration. If a patron address in an offline file has an unknown postal code, or if the city does not match an existing postal code, an error appears in the offline upload report and the address is not accepted. If the postal code and city match an existing combination, but the county does not match, the county in the patron address is changed to match the existing postal code-city-county combination.

The Serials permission **Suppliers: Modify postal address fields** controls the ability to enter a new city/country postal code combination for a U.S. or Canadian address when creating or editing a supplier record, and in the Donor view of a fund record. Staff members without this permission can edit street addresses or select a different (but existing) postal code/city/state/country combination in a supplier or fund record.

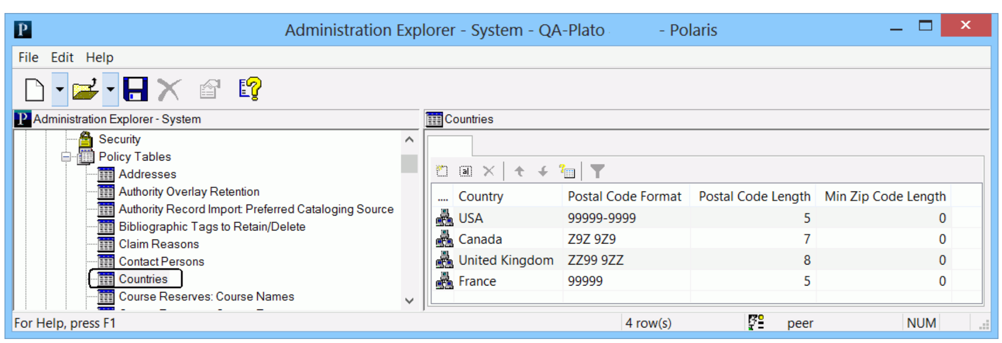
Note:
The **Modify countries table: Allow** and **Modify postal codes table: Allow** permissions are required to change these tables in Polaris Administration.

Add a postal code format

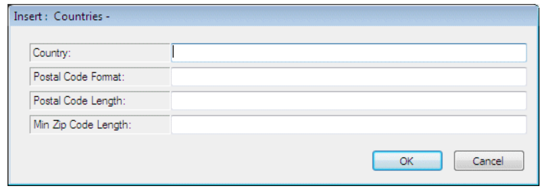
Follow these steps to define a new postal code format in Polaris.

1. In the Administration Explorer tree view, expand the **Policy Tables** folder for an organization, and select **Countries.**

   The Countries policy table appears in the details view.



2. Click  to display the Insert Countries dialog box.



3. Type the name in the **Country** box as you want the name to display for all **Country** boxes in Polaris workforms.
4. Define the postal code format in the **Postal Code Format** box.
   - To identify a number position, type **9**.
   - To identify an uppercase letter position, type an uppercase **Z**.
   - To identify a lowercase letter position, type a lowercase **z**.
   - Place dashes (-), periods (.), and spaces as required.

   Example:
   The postal code (ZIP) format for the United State is: **99999-9999**. The postal code format for Canada is: **Z9Z 9Z9**.
5. Specify the maximum format length in the **Postal Code Length** box.
6. Indicate, in the **Min Zip Code Length** box, how much of the postal code is required to deliver mail in the country.
7. Click **OK.**

   The Insert Countries dialog box closes and the Administration Explorer appears. The new entry appears in the Countries table. **Modification Pending** appears in the status bar.
8. Select **File, Save** to save your changes.

   Record saved appears in the status bar.

Related Information

Modify a table entry - Select the entry and click . All elements in the postal code format entry can be changed.

Important:
When you change a Countries table entry, all occurrences of the country name or postal format are changed in all Polaris records. You cannot delete an entry from this table. Postal code formats must be maintained as long as addresses in patron, supplier, and organization records use the postal code format.

Add a postal code

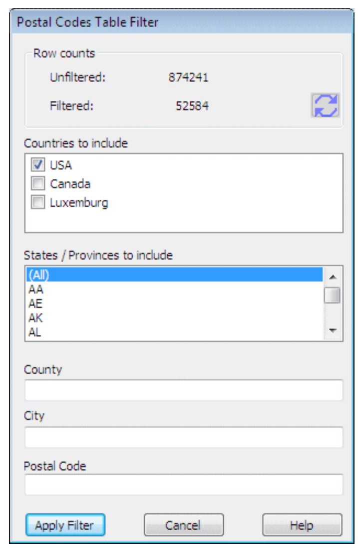
Follow these steps to add a postal code in Polaris.

Note:
Staff members with the appropriate permissions can also add entries to this table from certain Polaris records. See "Additions to the Postal Codes Table from Polaris Records" on page 61.

1. Verify that the country associated with the new postal code is listed in the Countries policy table. See "Add a postal code format" on page 61.

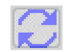
2. In the Administration Explorer tree view, expand the **Database** folder for an organization, and select **Postal Codes**.

   The Postal Codes Table Filter dialog box opens. The country filter is already selected based on the **Default Country** setting in the system record.



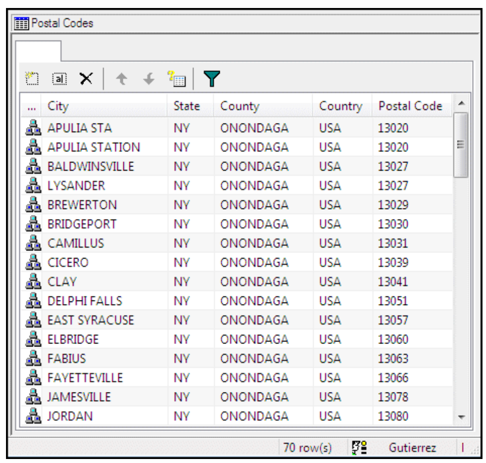
Important:
Unfiltered, the Postal Codes table takes some time to load because at implementation it may contain all the U.S. Postal Service Zip codes and/or Canadian postal codes—over 850,000 entries.

3. Set the filters you want to apply to the Postal Codes table:
   - **Country** - Select the country's check box to include the country's postal codes, or clear the check box to exclude them. At least one country must be selected.
   - **States/Provinces** - States or provinces are listed depending on the selected country. Select **All** to include the entire list, or select individual states or provinces.
   - **County, city, postal code** - These free-text fields are case-insensitive. You can use the asterisk wild-card character ***** at the beginning or end of the text string. You can also use the pound sign **#**, which stands for one character only, at any point in the text string.

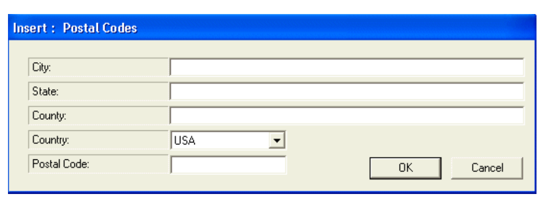
   Counts at the top of the filter dialog box show how many postal codes will be loaded with the filters you have set. When you change the filter criteria, you can click the refresh button  to see the new counts.

4. When you are ready to load the Postal Codes table, click **Apply Filter**.

   The filtered Postal Codes table appears in the details view of the Explorer.



5. Click  to display the Insert Postal Codes dialog box.



6. In the **City** box, type the name of the town or city associated with the postal code.

7. In the **State** box, type the name of the state or province where the city is located.

8. If required by library policy, type the county where the city is located in the **County** box.
9. Select the country in the **Country** box associated with this postal code.
10. Type the complete postal code for the city in the **Postal Code** box, and click **OK**.

    The Insert Postal Codes dialog box closes, and the new entry appears in the Postal Codes table. **Modification pending** appears in the status bar.

11. Select **File, Save**.

Tip:
From the Postal Codes table, you can open the Postal Codes Table Filter dialog box by clicking the funnel icon .

Related Information

- **Modify a table entry** - Select the entry and click . You can change all the information in the entry. Changes are applied immediately everywhere the entry is used.
- **Delete a table entry** - Select the entry and click . If the postal code is used in any record, a dialog box appears. You can choose to continue deleting the entry, and Polaris prompts you for the postal code to replace the entry you are deleting. The dialog box includes all the codes available in the filtered table.

Setting Organization Addresses

A standard set of addresses is available for use in all the organization records that include street addresses. You define the standard addresses in the Addresses policy table. Then the address entries in the policy table display as options for **Addresses** boxes on the organization workforms.

You can open the Addresses policy table from an organization workform or the Administration Explorer. You can display, add, delete, and change address entries from any organization level. The same list of addresses appears at all organization levels, and any changes to the Addresses policy table are applied to all organization records.

Note:
The **Modify address table: Allow** permission is required to work with this table.

See the following topic:

- "Add an organization address entry" on page 66

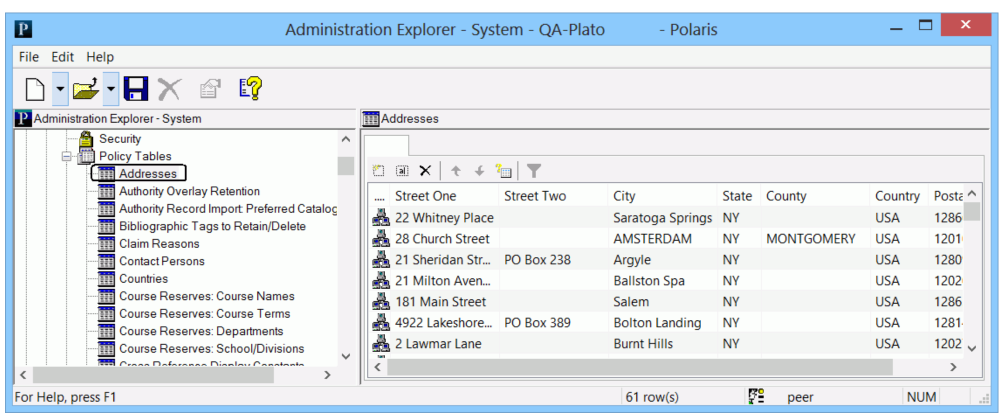
Add an organization address entry

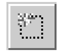
Follow these steps to add a new organization address to Polaris.

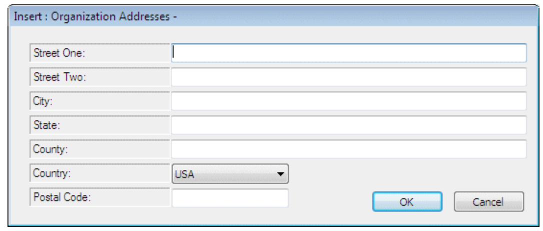
Note:
The postal code format and country for a new address must be defined in the Countries policy table before you can add an organization address. For more information, see "Add a postal code format" on page 61.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for an organization, and select **Addresses**.

   The Addresses policy table appears in the details view.



2. Click  to display the Insert Organization Addresses dialog box.



3. Type the first line of the street address in the **Street One** box.
4. If the street address for an organization requires a second line, type the additional part in the **Street Two** box.
5. Select the country for the organization in the **Country** box.
6. Type the postal code for the organization in the **Postal Code** box.

   The **City**, **State**, and **County** boxes display information appropriate to the postal code.

   > **Note:**
   > If the **City**, **State**, and **County** boxes do not display any information after entering the postal code, type the appropriate information in these boxes.

7. Click **OK** on the dialog box.

   The Insert Organization Addresses dialog box closes, and the new address entry appears in the Addresses policy table.

8. Select **File**, **Save**.

Related Information

- **Modify a table entry** - Select the entry and click . You can change all information in the address entry. Changes are immediately reflected in all records and workforms using the address entry.

- **Delete a table entry** - Select the entry and click . If the address entry is used in any organization record, you must change the record to a different address before you can delete the address entry. Deleting an address entry removes the address from display on all workforms that use the address.

Identifying Organization Contacts

A standard list of contact people is available for use in all the organization records that require contact information. You define the list of contacts in the Contact Persons policy table. Then the entries in the policy table are listed as options for the **Primary** and **Alternate** contact boxes on the organization workforms.

You can open the Contact Persons policy table from an organization workform or the Administration Explorer. You can display and work with contact entries from any organization level. The same list of contacts appears at all organization levels, and any changes to the Contact Persons policy table are applied to all organization records.

Note:
The **Modify contact persons table: Allow** permission is required to change this table.

See the following topic:

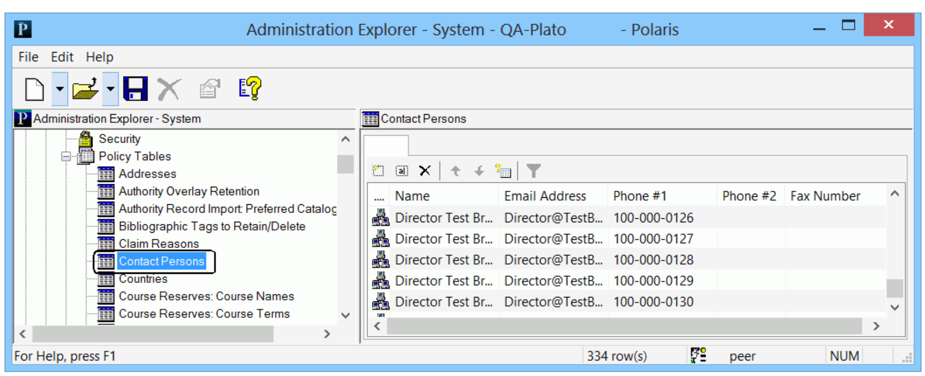
"Add a contact person entry" on page 68

Add a contact person entry

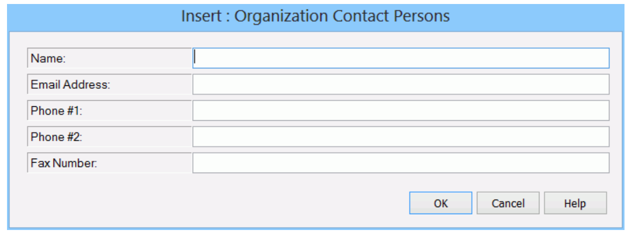
Follow these steps to add a new entry to the contact person list. All contacts added to the table are available for use in any Polaris organization record.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Contact Persons**.

   The Organization Contact Persons table appears in the details view. Personal information has been removed from the illustration.



2. Click [icon] to display the Insert Organization Contact Persons dialog box.



3. Type, in the **Name** box, the name of the contact person as you want it to display in other records.
4. Type the e-mail address for the contact person in the **Email Address** box.
5. Type the primary telephone number for the contact person in the **Phone #1** box.
6. If the person can be contacted at an alternate number, such as a cell phone, type the alternate telephone number in the **Phone #2** box.
7. If the person has a fax number, type the telephone number in the **Fax Number** box.
8. Click **OK** in the dialog box.

   The new entry appears in the Contact Persons policy table.
9. Select **File**, **Save**.

Related Information

- **Modify a table entry** - Select the entry and click [icon]. You can change all the information in the entry. For example, if a director retires and a new director is hired, you can change the name and e-mail address entries in the entry for the director, and the change is applied immediately everywhere the entry is used.

- **Delete a table entry** - Select the entry and click [icon]. If the contact person entry is used in any record, you cannot delete it. You must change the records to use a new contact person before you can delete the entry.

Identifying Dates Closed

You specify Dates Closed to indicate dates that an organization is closed when it otherwise would be open for business. For example, a branch is normally open on Tuesday, but in 2013, Christmas falls on a Wednesday. In this case, 12/25/2013 is listed as a date closed. The Dates Closed policy table contains the dates when libraries or branches in the system are closed. Closed dates can be set from the system, library, and branch levels. You can specify different closed dates for each organization in Polaris.

You can open the Dates Closed policy table from an organization workform or the Administration Explorer. The organization level at which the table is opened determines the entries you see in the list and the organizations for which you can specify a closed date:

- **System level** - Displays all libraries and branches with all dates closed for each organization. You can set the most common dates at the system level, so that these dates are also closed dates for all the libraries and branches. You can also set closed dates for specific libraries and branches.
- **Library level** - Displays all branches associated with the selected library, and all dates the branches are closed. You can set closed dates for a library, so that these dates are applied to its member branches. You can also set closed dates for specific branches, and remove closed dates for specific branches if they are not applicable to the branch.
- **Branch level** - Displays the closed dates for the selected branch. You can add or delete closed dates for the branch only.

Note:
The **Modify dates closed table: Allow** permission is required to change this table.

You specify the *days of the week* when an organization is ordinarily closed, such as Sunday, with the Patron Services parameter **Hours of operation**. Set this parameter at the system, library, or branch level. See "Setting Parameters and Profiles" on page 15. Settings in both the Dates Closed policy table and the **Hours of Operation** parameter are used to determine circulation due dates. See "Calculating Due Dates" in the *Polaris Patron Services Administration Guide 4.1R2*.

See the following topic:

- "Add a date closed" on page 71

Add a date closed

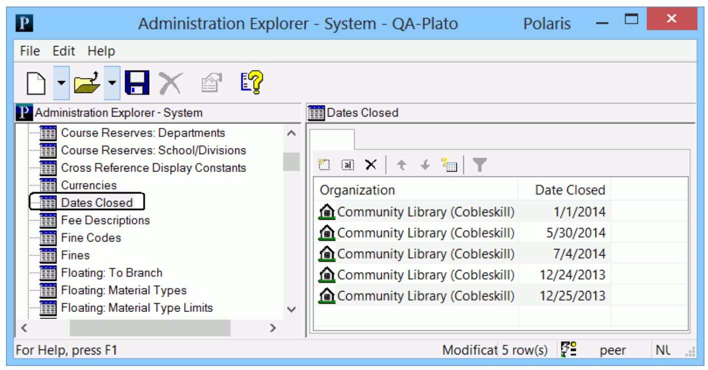
Follow these steps to define the dates when an organization is closed.

Tip:
Click the column heads in the Dates Closed table to sort the entries by organization or by date.

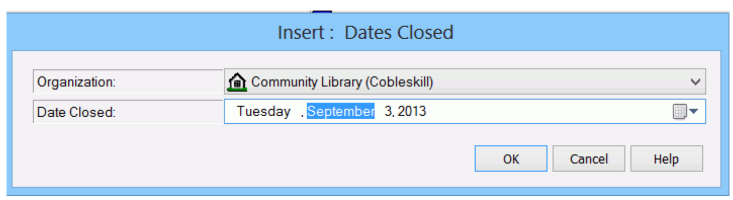
1. In the Administration Explorer tree view, open the **Policy Tables** at or above the organization level, and select **Dates Closed**.

   Example:
   If you are setting the dates closed for all member branches of a library, open the table at the library level. You can add the dates at the library level. All member branches inherit the same dates. In addition, at the library level, you can add or delete dates for specific member branches.

   The Dates Closed table appears in the details view.



2. Click  to display the Insert Dates Closed dialog box.



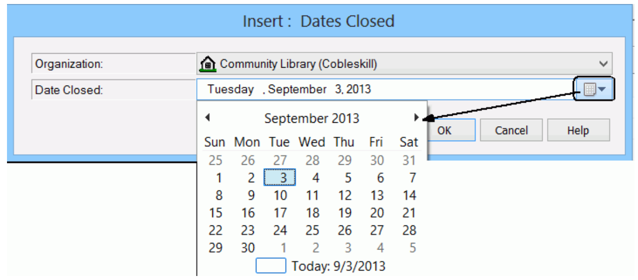
3. Select the organization for the closed date in the **Organization** list.

   If the Dates Closed policy table is opened at the branch level, only the branch name appears in the **Organization** list, and the dates closed apply only to that branch.

Tip:
You can type the date in the **Date Closed** box (**day of week, month, day of month, year**, or **MM/DD/YYYY**). If you type the wrong day of the week for the date, the day is automatically corrected.

4. Click the calendar icon on the **Date Closed** box.

   The calendar appears.



5. Click the month arrows until the month for the closed date appears.

6. Click the date on which the organization is closed.

   The Insert Dates Closed dialog box appears.

7. Click **OK**.

   The Insert Dates Closed dialog box closes. The new closed date appears in the Dates Closed table. **Modification pending** appears in the status bar.

8. Select **File, Save**.

Related Information

- **Modify a table entry** - Select the entry and click . The date in a displayed date closed entry is the only element you can change. You can change only the entries that display for the organization level at which the policy table is opened. If you need to change the entry for another organization, delete the entire incorrect entry and insert a new one.

- **Delete a table entry** - Select the entry and click .

Viewing Organization Licenses

Certain Polaris functions, such as Course Reserves and Polaris ExpressCheck, are available under separate licenses. You can quickly view system information and determine the active Polaris licenses for your system or any organization within the system.

See the following topic:

- "View system information and licenses" on page 73

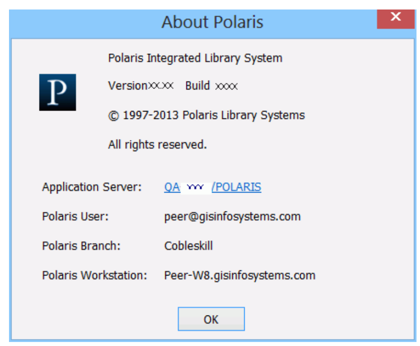
View system information and licenses

Follow these steps to see system information and active licenses.

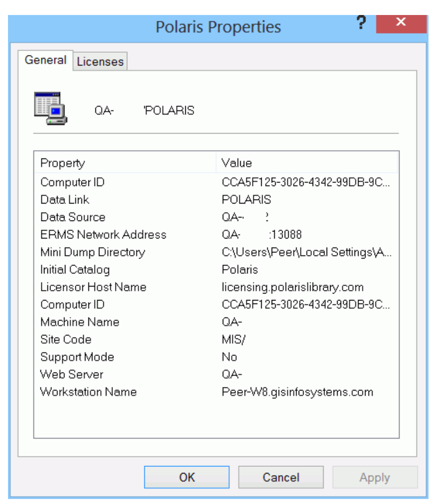
1. Select **Help, About Polaris** on the Polaris Shortcut Bar.

   The About Polaris dialog box opens.

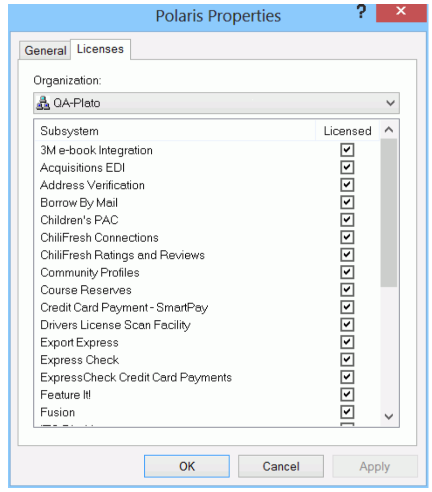
2. Click the **Application Server** link.



The Polaris Properties dialog box opens. The General tabbed page shows information about the system.



3. Click the **Licenses** tab to see the separately licensed functions that are active at the system level.



4. Select an organization from the **Organizations** list to see the active licenses for a particular organization (library or branch).

   Contact your Polaris Site Manager if you are interested in activating a license.

Working with Collections

A collection record names a collection, tracks which branches use the collection, and designates which branches (if any) are potentially eligible to receive items from the collection if it is allowed to float from branch to branch. After you set up collection records in Polaris Administration, they are available for selection in item records, selection lists, serial holdings records, purchase orders, and invoices. In addition, you can sort and filter searches for item records by collection in the Polaris Find Tool. Collection abbreviations are also used in designation fields of bibliographic records when these are imported for bulk-adding to purchase orders or selection lists, and for shelf-ready cataloging.

Each branch may have its own set of collections, and collections can have the same names used by other branches. In addition, a collection can belong to more than one branch for rotating collections or for shared collections, and you can designate collections as potentially eligible to float from branch to branch. Certain circulation reports also list items by collections.

Special considerations:

- **Children's items** - If you offer Polaris PowerPAC Children's Edition to your patrons, consider setting up collections specifically for children's items, such as children's periodicals, if you do not already have them. You can then filter Children's PAC searches to target these collections. For more information, see "Setting Children's Search Limits" in the *Polaris Public Access Administration Guide 4.1R2*.
- **Floating collections** - If your system uses floating collections, allowing items from certain collections to float from branch to branch at check-in, consider setting up these collections so that all branches that participate in the floating arrangement use the collections. For more information, see "Setting Up Floating Collections" in the *Polaris Patron Services Administration Guide 4.1R2*.

See the following topics:

- "Add a new collection record" on page 76
- "List collections in the Explorer" on page 77
- "Review and edit collection information" on page 79
- "Delete a collection" on page 82
- "List the collections assigned to a branch" on page 83
- "Collections Report" on page 83

Add a new collection record

Tip:
You can also create a new collection record by copying an existing collection record. Select **File, New** from the Collection workform menu bar and copy or clear the information in the workform. See “Create a new record from a workform” in the *Polaris Basics Guide 4.1R2*. Then you can edit the collection record. See “Review and edit collection information” on page 79.

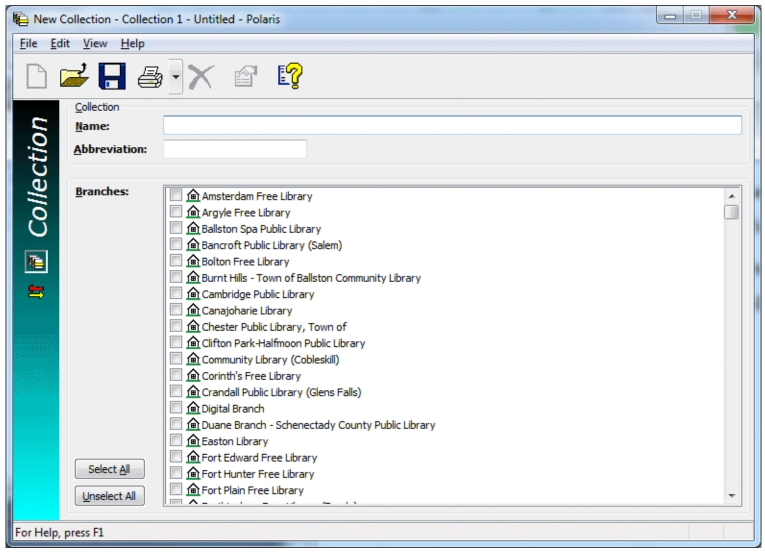
Follow these steps to add a collection name to Polaris.

1. Select **Administration, Explorer, System** on the Polaris Shortcut Bar.

   The Administration Explorer appears.

2. Select **File, New, Collection** on the Administration Explorer menu bar.

   The Collection workform appears.



3. Type a name for the collection in the **Name** box.

4. Type an abbreviation for the collection in the **Abbreviation** box.

   In Polaris Find Tool power searches and PAC Boolean searches, you can search for items in the collection using the access point COL and the collection abbreviation.

   Example:
   An Adult Fiction collection is assigned the abbreviation **AF**. You can power search for items in this collection by typing **COL=AF**.

   Important:
   If you use enriched EDI ordering and shelf-ready cataloging with Baker & Taylor, the collection abbreviation is limited to 10 characters or fewer to comply with this vendor’s data requirements.

5. Select the branch or branches to which this collection belongs, or click **Select All** if you want to add the collection to all branches.

   If a branch is already using a collection with the same name, a Duplicate Detection message appears. A branch cannot have duplicate collections.

6. If your system uses floating collections, and you want items in this collection to be potentially eligible to “float” from branch to branch, select **View, Floating branches** or click . Then follow the instructions in “Designating Floating Collections” in the *Polaris Patron Services Administration Guide 4.1R2*.

7. Select **File, Save**.

Related Information

- **Floating Collections** - See “Setting Up Floating Collections” in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Displaying collection information in the PAC** - Collection information automatically displays for an item in Polaris PowerPAC and Mobile PAC.
- **Defining shelf locations** - You can also define shelf locations, either as subsets of collections or unrelated to collections, for display in the PAC. See “Naming Shelf Locations” in the *Polaris Public Access Administration Guide 4.1R2*.

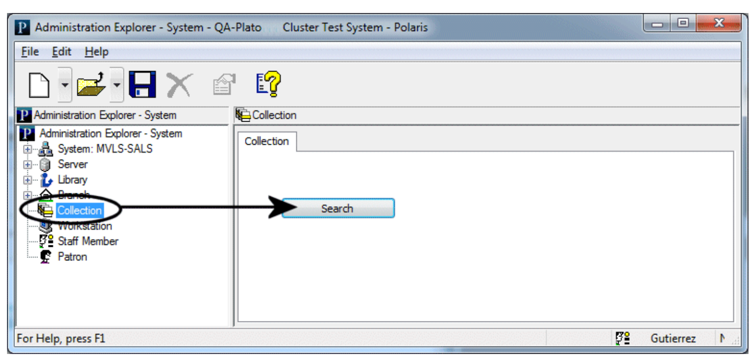
List collections in the Explorer

Collections are not automatically listed in the Administration Explorer because there may be many of them in the system. However, if you plan to work with several collections, it may be convenient to list them in the Administration Explorer so you do not have to search for each one. Follow these steps to list several or all the collections in the system in the Administration Explorer tree view.

Tip:
If you want to work with a specific collection, you can use the Polaris Find Tool to search for and open the collection record. Select **Administration**, **Collection** on the Polaris Shortcut Bar. If you want to work with multiple collections, use the Administration Explorer.

1. Click **Collection** in the Administration Explorer tree view.

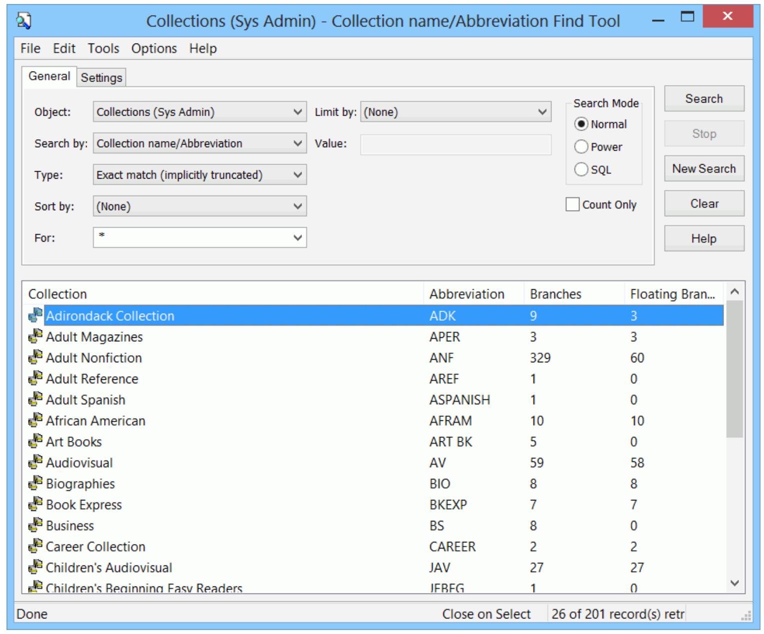
   A search button appears in the details view of the Explorer.



2. Click **Search** to display the Polaris Find Tool.
3. Select **Collection Name/Abbreviation** in the **Search By** box.
4. Type an asterisk * (for all) in the **For** box.
5. Click **Search** on the Find Tool.

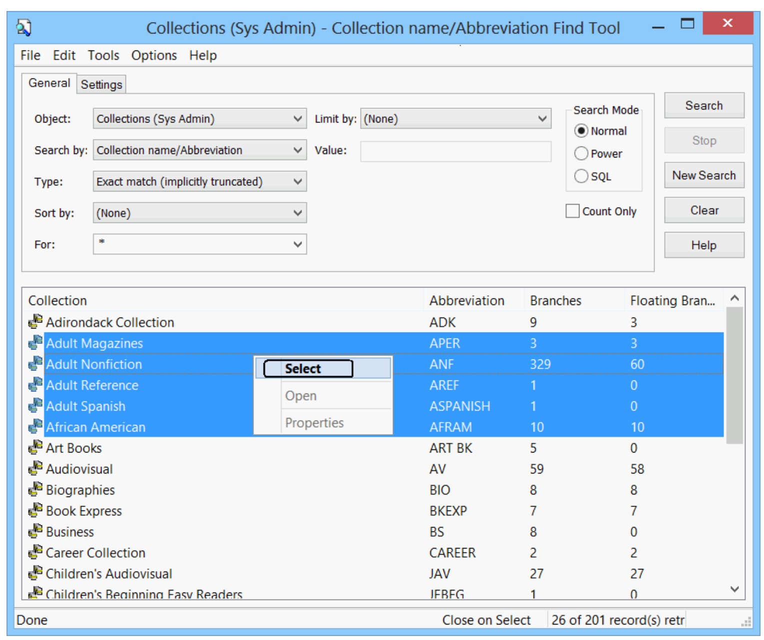
The results list includes all the collections defined in Polaris.

Note:
If there are too many collections to display at once, the status bar indicates how many have been loaded. You can press **CTRL+SHIFT+A** to load the entire list.

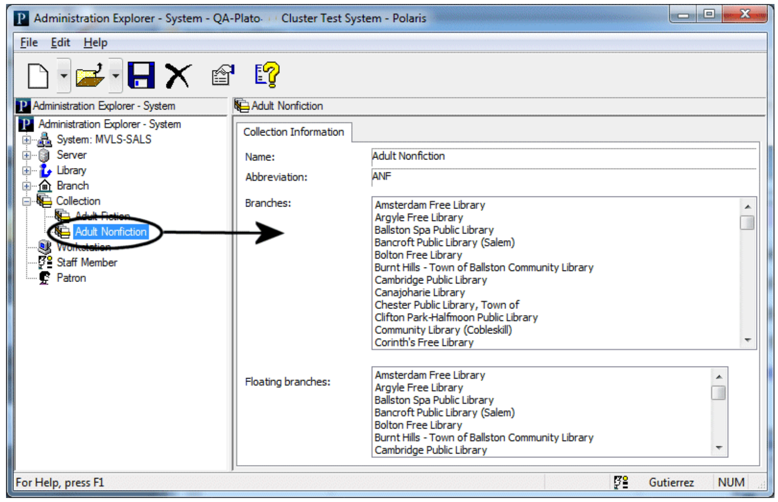


6. In the results list, select the collections to be displayed in the Administration Explorer. You can use the **CTRL** or **SHIFT** key to select multiple collections.

7. Right-click in the results list, and choose **Select** from the context menu.



All the selected collections are listed under **Collection** in the Administration Explorer tree view. When you select a collection, the right pane shows the collection information, including all branches that use the collection. To edit a collection, see "Review and edit collection information" on page 79.



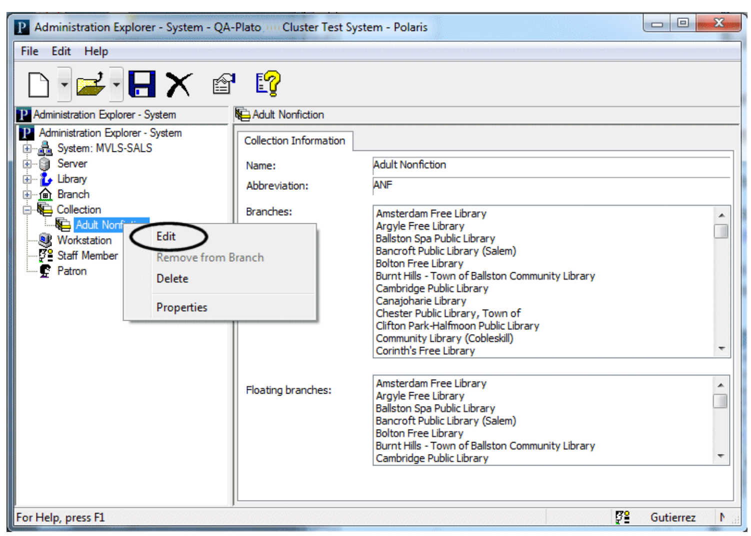
Review and edit collection information

From the collection record, you can see a list of branches using the collection, add or remove branches using the collection, and change the name of the collection. Follow these steps to open a collection record.

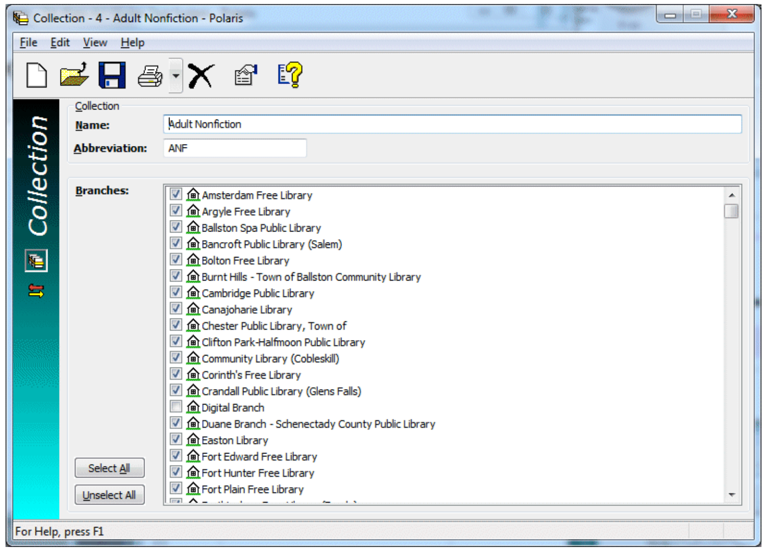
1. List the collection in the Administration Explorer tree view. See "List collections in the Explorer" on page 77.

2. Right-click the collection in the Administration Explorer, and select **Edit** from the context menu.

Tip:
Right-click the collection and select **Properties** from the context menu to see information about the collection without opening the collection record.



The Collection workform opens.



Branches that use the collection are checked.

3. To change the collection name, type the new name in the **Name** box.

   The name is changed in every record that uses this collection.

4. To change the abbreviation, type the new abbreviation in the **Abbreviation** box. The abbreviation is changed in every record that uses this collection.

5. To assign this collection to a branch, select (check) the box next to the branch name.

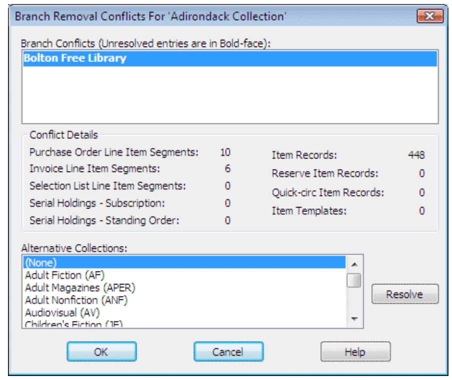
   If adding this collection to the branch would result in a duplicate collection at the branch, a Duplicate Detection message appears when you save the collection. A branch cannot have duplicate collections.

6. To remove this collection from a branch, clear the check box next to the branch name.

7. If your system uses floating collections, and you want items in this collection to be potentially eligible to "float" from branch to branch, select **View, Floating branches** or click . Then follow the instructions in "Designating Floating Collections" in the *Polaris Patron Services Administration Guide 4.1R2*.

8. Select **File, Save** to record your changes.

   The Branch Removal Conflicts dialog box appears if there are items assigned to a collection that you removed from a branch.



9. If the Branch Removal Conflicts dialog box appears, do the following actions:

   a) Select a branch name in the **Branch Conflicts** list.

   b) In the Conflict Details frame, review the types and numbers of records that are affected by the change.

   c) Do one of the following actions to resolve the assigned branch and collection conflict in the listed records:

   - To remove assignment of the collection from the records listed in the Conflict Details frame, select **(None)** in the **Alternative Collections** list, and click **Resolve**.
   - To assign another collection to the records listed in the Conflict Details frame, select the collection name to assign in the **Alternative Collections** list, and click **Resolve**.

     Note:
     Only the collections available for the associated branch are listed in the Resolve Conflict dialog box.

   d) Click **OK** on the Branch Removal Conflicts dialog box.

   The dialog box closes.

Related Information

- **Floating Collections -** "Setting Up Floating Collections" in the *Polaris Patron Services Administration Guide 4.1R2*
- **Delete a collection** - See "Delete a collection" on page 82
- **Removing a branch from a shared collection -** If you want to remove a branch from a shared collection, then link associated records to a collection with the same name just for the branch, do the following actions:
  1. Create a collection with a slightly different name, and assign the branch to it.
  2. Remove the branch from the shared collection, and assign the linked records to the new collection.
  3. Rename the new collection to the name of the original shared collection.

Delete a collection

If a collection is not being used, it is automatically deleted when you remove it from the last branch with which it is associated. You can also manually delete a collection. Certain links prevent the deletion, and you must resolve the conflicts before the collection is deleted. For other types of links, you can choose to break the links and delete the collection, or cancel the operation. Follow these steps to manually delete a collection record.

1. List the collection in the Administration Explorer tree view. See "List collections in the Explorer" on page 77.

Tip:
Right-click the collection and select **Delete** from the context menu to delete the collection without opening the collection record.

2. Right-click the collection in the Administration Explorer, and select **Edit** from the context menu.

   The Collection workform opens.

3. Choose one of these delete methods:
   - Select **File, Delete.**
   - Click the Delete icon  on the toolbar.
   - Press **CTRL+D**.
   - Press **ALT+F+D**.

   The system checks for linked objects that use the Collection. These links prevent the collection from being deleted, and you must resolve the conflicts before deleting the collection. The message lists the number of linked objects:

   - Item Records
   - Reserve Item Records
   - Item Templates
   - Reserve Item Templates
   - Serial Holdings Records
   - Quick-circ Item records
   - Standing Order Part Records

   The system also displays a warning message and the count of linked objects if any of these features use the collection:

   - Children's PAC Search Limit
   - Selection List Line Item Segments
   - PO Line Item Segments
   - Invoice Line Item Segments

   For these links, you can click **No** (the collection is not deleted) or **Yes** (the collection is deleted). If you click **Yes**, the deleted collection is replaced by **[None]** in the linked objects.

List the collections assigned to a branch

Follow these steps to see a list of collections assigned to a specific branch.

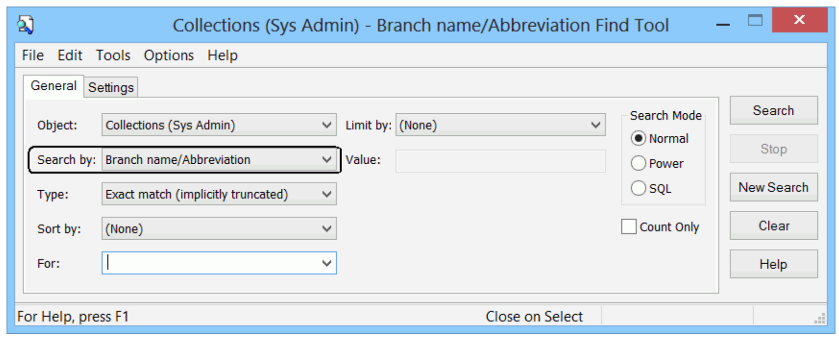
Note:
You can run a report to see the collections assigned to all branches. See "Collections Report" on page 83.

1. Click **Collection** in the Administration Explorer tree view.

   The search button appears in the right pane of the Explorer.

2. Click **Search** to display the Polaris Find Tool for collections.

3. Select **Branch Name/Abbreviation** in the **Search By** box.



4. Type the name of the branch in the **For** box, and click **Search** on the Find Tool.

   The collections associated with the branch are displayed in the results list. If there are too many collections to display at once, you can press **CTRL+SHIFT+A** to load the entire list.

Collections Report

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.

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

Setting Up Workstation and Staff Member Records

Workstation records store information about the staff and public computers that are directly networked to Polaris. You can also identify non-network workstations as “in-house” for authentication purposes. Staff records store profile and permission settings for each staff member.

See the following topics:

- “Setting Up Workstations” on page 85
- “Identifying In-House Computers” on page 91
- “Setting Up Staff Records” on page 95
- “Multi-Domain System Support” on page 101
- “Staff and Workstation Reports” on page 104

Setting Up Workstations

A Polaris workstation is a directly-networked computer that runs Polaris staff client or Polaris® ExpressCheck™ software. Workstation records store information such as permissions, printing defaults, and barcode recognition defaults.

Workstation records are set up and maintained in Polaris Administration with the Workstation workform. Each workstation record is associated with a parent organization. You can use the Workstation workform or the Administration Explorer to view workstation information, change permissions or profiles, or remove the workstation from the Polaris system.

Note:
You may want to set certain computer IP addresses as "in-house" for authentication purposes, even though they are not registered as networked Polaris workstations. For more information, see "Identifying In-House Computers" on page 91.

See the following topics:

- "Register a new workstation" on page 85
- "List workstations in the Explorer" on page 89

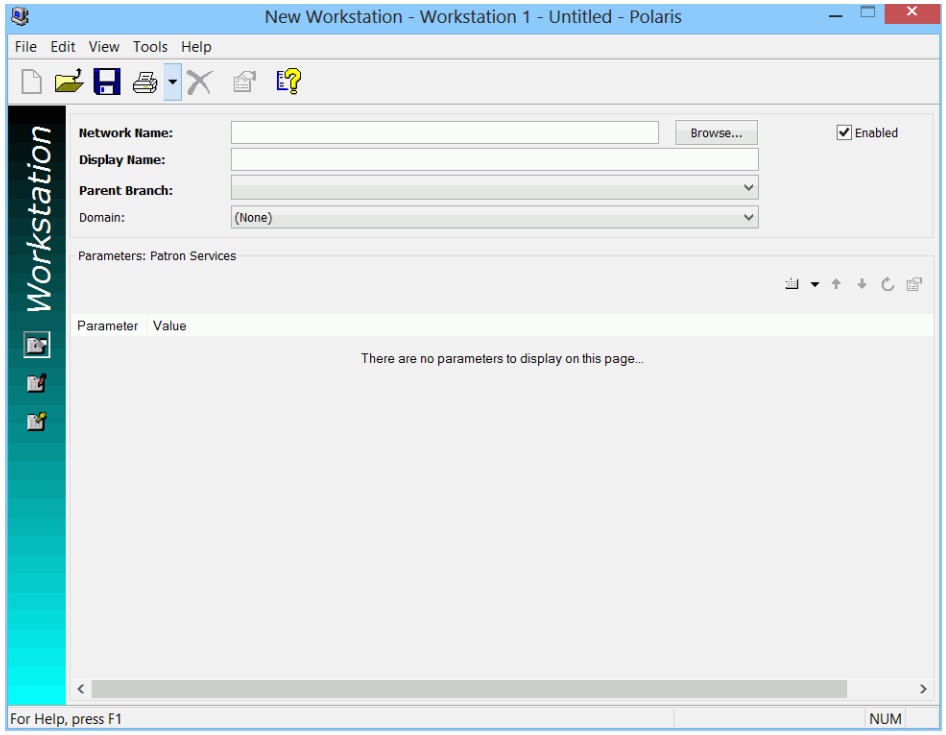
Register a new workstation

Follow these steps to add a staff client or Polaris ExpressCheck workstation to Polaris.

1. Select **Administration**, **Explorer**, **System** on the Polaris Shortcut Bar.
2. Select **File, New, Workstation** from the Administration Explorer menu bar, or click and select **Workstation**.

   The Workstation workform opens.

Tip:
You can also create a new workstation record from an open Workstation workform. Select **File, New** on the workform. You can copy the open record's information to the new record or start with a clear record.



3. In the **Network Name** box, enter the network name of the workstation, using one of the following methods:
   - Type the workstation network name.
   - Click **Browse**, and use the Network Browser dialog box to locate and select the workstation. The workstation name appears in the **Network Name** box.

4. In the **Display Name** box, type an identifying name for the workstation.

   This name identifies the workstation in Polaris, for example in permission lists, in Polaris Find Tool results lists, and in the tree view of the Administration Explorer. The name must be unique in a single domain system. For more information, see "Multi-Domain System Support" on page 101.

5. In the **Parent Branch** box, select the branch to which the workstation is assigned.

   Note:
   The workstation's parent branch is the default selection in the Polaris Log On Branch dialog box. If the staff member does not have the Logon branch: Access permission for the workstation's branch, the default selection is the staff member's home branch. If the staff member does not have the Logon branch: Access permission for the home branch, the first branch in the list of permitted branches is the default selection. The parent branch is also used for determining the offline checkout defaults.

6. If your Polaris installation is in a multi-domain system, select the workstation's domain from the **Domain** list. See "Multi-Domain System Support" on page 101.

7. If this workstation will be used for staff client operations, confirm that the **Enabled** box is checked (the default setting) to allow this workstation to log in to the staff client.

   Important:
   Be sure to select the **Enabled** check box for workstations that require access to the staff client.

8. Set permissions and profiles for the workstation as appropriate.

   Note:
   For a staff member to do a task on a particular workstation, both the staff member and the workstation must have the appropriate permission for the task.

9. Select **File, Save**.

Related Information

- **Permissions** - See "Managing Permissions for Staff, Workstations, Groups" on page 126.
  - **Setting up permission groups to manage permissions -** You can set up groups with specific sets of permissions, then add workstations and staff members to the group. When workstations and staff members are added to the group, they get the group's permissions. See "Managing Permissions with Permission Groups" on page 118.
  - **Setting permissions for individual staff members and workstations** - You can grant permissions individually to specific staff members and workstations. See "Assign permissions to staff, workstation, or group" on page 128. Permissions for staff workstations and staff members are set separately.
- **Editing staff member or workstation settings** - You can edit profiles and parameters for a staff member or workstation from the Administration Explorer or from the workform.
  - Administration Explorer - Display the workstation or staff member in the Explorer tree view. See "List workstations in the Explorer" on page 89 or "List staff members in the Explorer" on page 98. Then expand the folder for workstation or staff member, and select **Profiles** or **Parameters**. Change the settings in the details view on the right side of the Explorer. See "Set parameters or profiles from the Explorer" on page 17.
  - **Workstation or Staff Member workform** - Open the workform and go to the Parameters or Profiles view. See "Set parameters and profiles from a workform" on page 19.
- **Staff client settings** - Certain settings, such as Polaris Find Tool functions, locale and time consistency checking, labels defaults, and the location of online documents, can be set at the workstation level for staff workstations. See "Setting Staff Client Profiles" on page 33.

- **Receipt printers on staff client workstations** - You can set the features available for specific printers, and add new receipt printers. See "Set receipt printer control codes" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Polaris ExpressCheck workstations** - If the workstation is used for Polaris ExpressCheck self-check circulation, continue with Polaris ExpressCheck set-up. For more information, see the *Polaris ExpressCheck Administration Guide*.
- **Acquisitions/Serials settings -** Certain settings can be made at the workstation level for Acquisitions and Serials. For more information, see the "Acquisitions Administration" in the *Polaris Acquisitions Guide 4.1R2*.
- **Cataloging settings** - Certain settings can be made at the workstation level for Cataloging. For more information, see the "Cataloging Administration" in the *Polaris Cataloging Guide 4.1R2*.
- **Patron Services settings -** Certain settings can be made at the workstation level for Patron Services. For more information, see the *Polaris Patron Services Administration Guide 4.1R2*.
- **Anonymous OPAC Workstation** - This workstation record is used by Polaris PowerPAC code and is installed with Polaris. It cannot be altered.

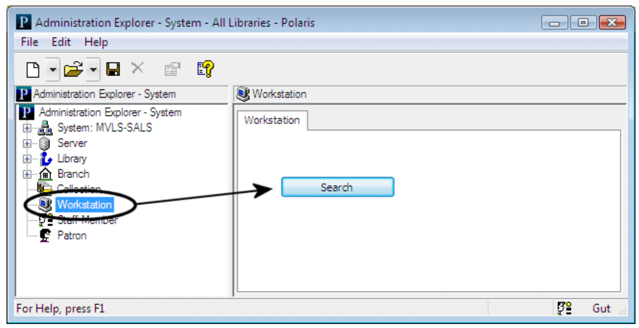
List workstations in the Explorer

At the system level, workstations are not listed in the Administration Explorer because there may be many of them in the system. However, if you plan to work with several workstations, it may be convenient to list them in the Administration Explorer so you do not have to search for each one. Follow these steps to list several or all the workstations in the system in the Administration Explorer tree view.

Tips:
To work with a specific workstation, select **Administration**, **Workstation and** search for it using the Polaris Find Tool. To work with multiple workstations, use the Administration Explorer. To list the workstations for a specific branch, click **+** by the branch in the tree view, and click **+** by **Workstation** under the branch.

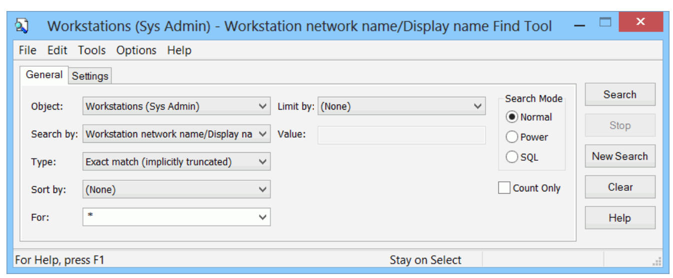
1. Select **Administration**, **Explorer**, **System** on the Polaris Shortcut Bar.
2. Click **Workstation** in the tree view of the Administration Explorer.

   A search button appears in the right pane of the Explorer.



3. Click **Search** to display the Polaris Find Tool.

   Workstation Network Name/Display Name is selected in the **Search By** box.
4. Type an asterisk * (for all) in the **For** box.

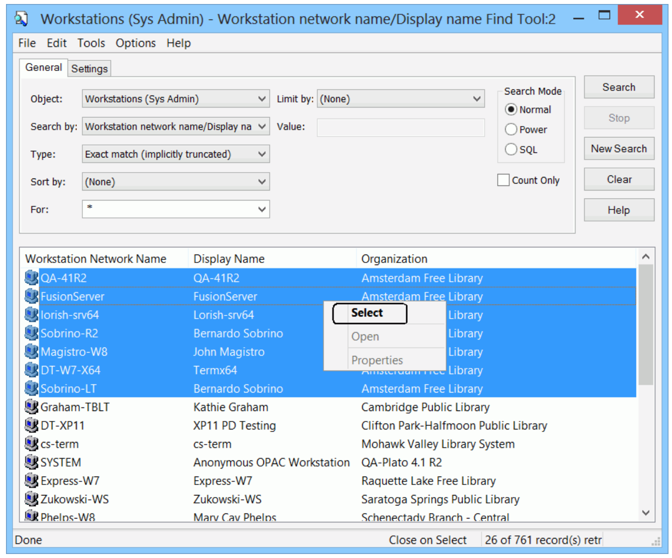


5. Click **Search** on the Find Tool.

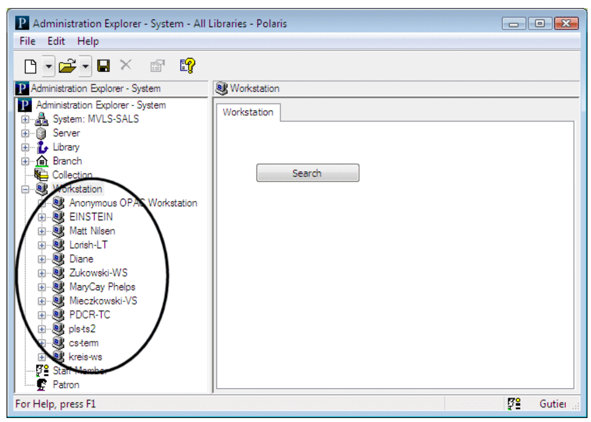
   The workstations are displayed in the results list.

Tip:
If there are too many workstations to display at once, the status bar indicates how many have been loaded. You can press **CTRL+SHIFT+A** to load the entire list.

6. Select workstations to list in the Explorer. You can use the **CTRL** or **SHIFT** key to select multiple workstations.
7. Right-click in the results list, and choose **Select** from the context menu.



All the selected workstations are listed under **Workstations** in the Administration Explorer tree view.



Related Information

- **New workstations** - See “Register a new workstation” on page 85.
- **Editing workstation settings** - Expand the workstation folder in the tree view, and select **Parameters**, **Profiles** or **Permissions**. The right pane of the Explorer displays the information. For links to information about workstation settings, see “Register a new workstation” on page 85. To edit the workstation from its workform, right-click the workstation name in the Explorer tree view, and select **Edit** from the context menu to open the Workstation workform.
- **Deleting a workstation** - To delete workstation records from the Polaris database, right-click the workstation name in the Explorer tree view, and select **Delete** from the context menu.

  Important:
  Avoid deleting workstations during active business hours, because the action has complex effects in the Polaris database and may impact other operations.

Identifying In-House Computers

Computers that are networked and registered in Polaris Administration as workstations are always considered to be in-house, but you may also want to consider other, non-networked computers as in-house. The following situations are some examples:

- Public access computers in the library use Polaris PowerPAC, which is Web-based. You may want to set a patron inactivity timeout on these computers, so that patrons are automatically logged off after a specified period of time.
- You want to limit certain library services, such as patron access to specific third-party databases (e-sources), so that they are available only to Polaris PowerPAC computers located in the library.
- Some locations may use different Internet service providers, or different network domains. You may not be able to register these computers in Polaris as workstations because of network security settings.
- Wireless networks or public network connections allow patrons to connect to the catalog with their own laptop computers, but the library wants to include these computers in statistical reports on in-house library usage.

To identify a non-networked computer as in-house, you add its specific IP address to the In-House IP Addresses table. You can open the In-House IP Addresses table from the organization workform or the Administration Explorer.

Note:
If a workstation record has been been set up in Polaris Administration, the workstation is automatically considered an in-house location. Do not list it in the In-House IP Addresses table. A computer is considered remote if neither the registered workstation nor the IP address is found in the Polaris system.

You can then determine whether the system checks the In-House IP Addresses table alone or both the In-House IP Addresses table and the workstations registered in Polaris to determine whether a workstation is in-house. You can set separate criteria for patron inactivity timeout and e-source access.

See the following topics:

- “Identify IP addresses of in-house computers” on page 92
- “Set criteria for determining in-house location” on page 93

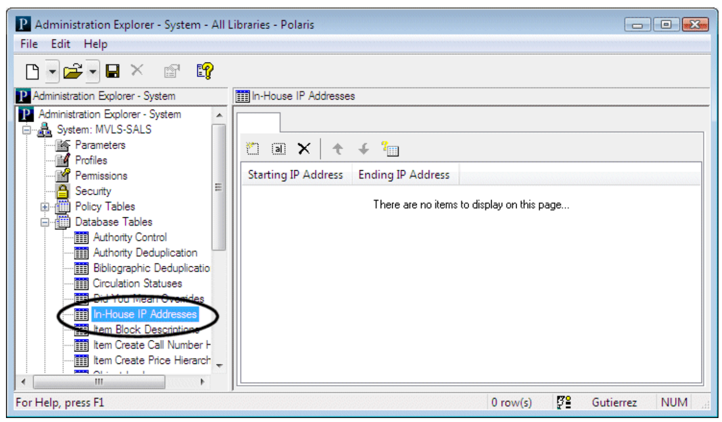
Identify IP addresses of in-house computers

Follow these steps to identify computers that Polaris should consider as local access, even though they are not registered as Polaris workstations.

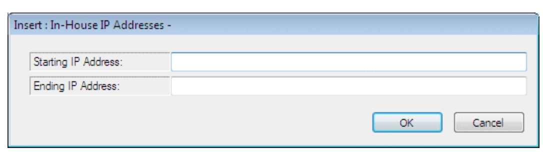
Note:
Ordinarily you do not do this procedure for networked computers that have Polaris staff client software installed. Register these computers as workstations in Polaris. See “Register a new workstation” on page 85. However, you may want to add registered workstations to this table if you experience performance issues when the system determines whether a workstation is in-house for the purposes of PAC patron inactivity timeout or access to e-sources. See “Set criteria for determining in-house location” on page 93.

1. In the Administration Explorer tree view, expand the organization, open **Database Tables** for the organization, and select **In-House IP Addresses**.

   The In-House IP Addresses table appears in the details view.



2. Click [icon] to display the Insert In-House IP Addresses dialog box.



3. Type the smaller boundary network identification number in the **Starting IP Address** box, for the subnet range that has in-house computers.

   The IP address range can fall in subnet boundaries. For example, if you are using the 10.0.0.0 private network ID for your intranet, a range that falls in subnet boundaries is 10.0.1.168 to 10.0.1.175.

4. Type the larger boundary network identification number in the **Ending IP Address** box, for the subnet range that has in-house computers.

5. Click **OK**.

   The In-house IP Addresses dialog box closes, and the new IP address entry is displayed in the table. The status bar indicates that the modification is pending.

6. Select **File, Save**.

Related Information

- **Modify a table entry** - Select the entry and click .
- **Delete a table entry** - Select the entry and click .
- **Setting a patron inactivity timeout** - See "Allowing Patron Account Access" in the *Polaris Public Access Administration Guide 4.1R2*.
- **Setting up e-source restrictions** - See "Managing E-Sources" in the *Polaris Public Access Administration Guide 4.1R2*.

Set criteria for determining in-house location

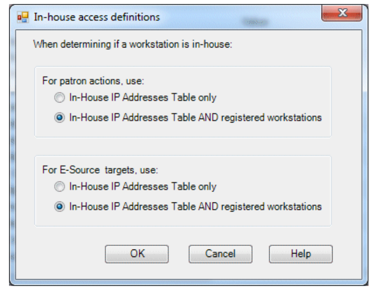
Use the PowerPAC profile **In-house access definitions: Setup** to control how a workstation's in-house status is determined for patron actions such as patron inactivity timeout and recently viewed titles, and e-source access. The profile is available at the system, library, and branch levels; the system uses the setting of the Polaris PowerPAC connection organization. You can set separate criteria for patron actions and access to e-source targets. If you select **In-House IP Addresses Table only**, a workstation's IP address must be included in that table to be considered in-house. If you select **In-House IP Addresses Table AND registered workstations**, a workstation's IP address can either be included in the In-House IP Addresses table or the workstation can be registered in Polaris to be considered in-house. This is the default setting for both patron actions and e-source target access.

> **Note:**
> Look-ups to determine whether a workstation is registered in Polaris can impact performance on slow or complicated networks. If you experience these problems, you can change the setting for patron actions, e-source access, or both, to **In-House IP Addresses Table only.** If you do not experience performance problems, the default settings are probably satisfactory.

Follow these steps to set the criteria for determining in-house location.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **PowerPAC** tab in the details view.
2. Double-click **In-house access definitions: Setup.**

   The In-house access definitions dialog box opens.



3. Select one of the following options:
   - **In-House IP Addresses Table only** - A workstation's IP address *must* be included in that table to be considered in-house.

     Note:
     With this setting, If a staff member's workstation is listed in the In-House IP Addresses table, the staff member has logged in to his own patron account in PAC, and you have enabled a patron inactivity timeout, the staff member's session will be eligible to time out.
   - **In-House IP Addresses Table AND registered workstations** - Default setting. A workstation's IP address can either be included in the In-House IP Addresses table or the workstation can be registered in Polaris to be considered in-house.
4. Select an option for determining whether a workstation is in-house for the purposes of e-source access:
   - **In-House IP Addresses Table only** - A workstation's IP address *must* be included in that table to be considered in-house.

     Note:
     If a staff member's workstation is not listed in the In-House IP Addresses table and you have limited access to an e-source target to in-house workstations only, the staff member will not be able to access the e-source target in the PAC. If this situation is an issue, you must include the workstation IP address in the In-House IP Addresses table.
   - **In-House IP Addresses Table AND registered workstations** - Default setting. A workstation's IP address can either be included in the In-House IP Addresses table or the workstation can be registered in Polaris to be considered in-house.
5. Click **OK**.

Related Information

- **Entering information in the In-House IP Addresses table** - See "Identify IP addresses of in-house computers" on page 92.
- **Setting a patron inactivity timeout** - See "Allowing Patron Account Access" in the *Polaris Public Access Administration Guide 4.1R2*.
- **Setting up Recently Viewed Titles** - See "Setting Up Recently Viewed Titles" in the *Polaris Public Access Administration Guide 4.1R2*
- **Setting up e-source restrictions** - See "Managing E-Sources" in the *Polaris Public Access Administration Guide 4.1R2*.

Setting Up Staff Records

Staff member records store information such as user name, permissions, and profiles for each staff member. Each staff member record is associated with a parent branch. You can add a staff member record, change the information, or delete a record from the Staff Member workform or Administration Explorer.

Important:
The values for staff permissions and profiles default from the parent branch values. If a permission is not assigned at the branch level, you cannot give the staff member the permission.

User names for staff members must be unique, and can be up to 35 characters long.

The Windows network security file controls access to Polaris. You should establish a Windows network account with a password for every staff member with a Polaris staff member record. Staff passwords should not contain forward slash / or backslash \ characters.

Important:
Your library may be required to follow PCI compliance practices for credit card processing. If so, you must require unique domain user IDs and follow secure authentication best practices for workstation log-on. A generic Windows log-on such as Circ1 would be out of compliance because it would not be possible to trace the transaction back to the staff member who performed it.

See the following topics:

- "Add a staff member record" on page 96
- "List staff members in the Explorer" on page 98

Add a staff member record

Follow these steps to add a new staff member record to Polaris.

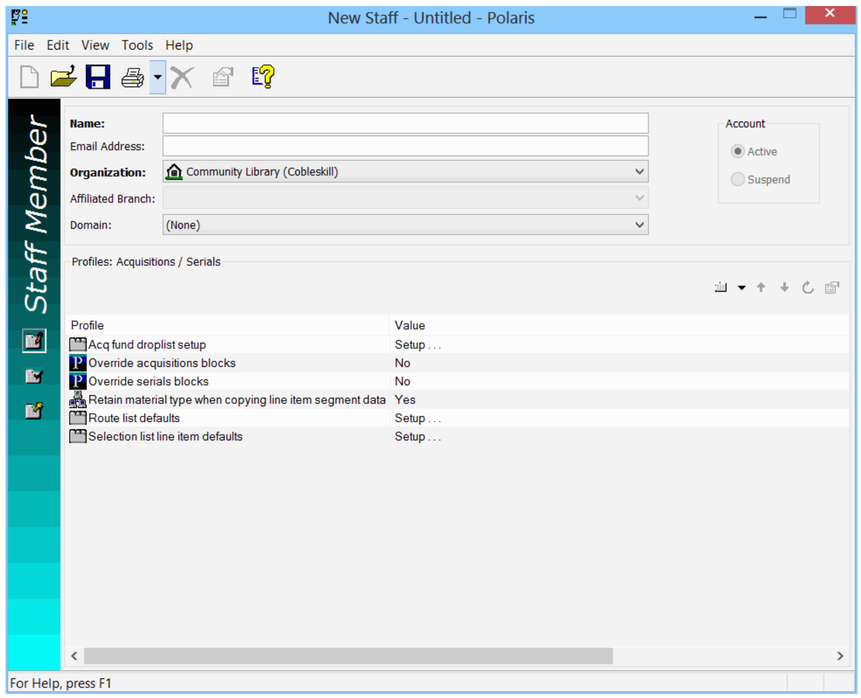
Tip:
You can also create a new staff member record from an open Workstation workform. Select **File, New** on the workform. You can copy the open record's information to the new record or start with a clear record.

1. Select **Administration, Explorer, System** on the Polaris Shortcut Bar, or click and select **Staff Member**.

   The Administration Explorer opens.

2. Select **File, New, Staff Member** on the Administration Explorer menu bar.

   The Staff Member workform appears.



3. Complete the text fields on the form.
   - **Name** - Type the staff member user name. The name must be unique in a single domain system. For more information, see "Multi-Domain System Support" on page 101.
   - **Organization** - Select a library name from the list.
   - **Affiliated Branch** - If the parent organization is not a branch, select the branch name to which the staff is assigned from the drop-down list.
   - **Email Address** (optional) - Type the full email address.
   - **Domain** - If your Polaris installation is in a multi-domain system, select the staff member's network domain from the **Domain** list. See "Multi-Domain System Support" on page 101.

4. Set permissions and profiles for the staff member as appropriate.

Note:
The new staff member record contains no permissions, and you must explicitly add permissions to the record. If you try to save a new staff record without adding permissions, a confirmation message appears. You can choose to save the record with no permissions, or cancel the save and add the permissions. For information about setting permissions, see "Granting Permissions" on page 106. For a staff member to do a task on a particular workstation, both the staff member and the workstation must have the appropriate permission for the task.

5. Select **File**, **Save**.

Related Information

- **Permissions** - See "Managing Permissions for Staff, Workstations, Groups" on page 126.
    - **Setting up groups to manage permissions -** You can set up groups with specific sets of permission, then add workstations and staff members to the group. When workstations and staff members are added to the group, they get the group's permissions. See "Managing Permissions with Permission Groups" on page 118.
    - **Setting permissions for individual staff members and workstations** - You can grant permissions individually to specific staff members and workstations. See "Assign permissions to staff, workstation, or group" on page 128. Permissions for staff workstations and staff members are set separately.
- **Editing staff member or workstation settings** - You can edit profiles and parameters for a staff member or workstation from the Administration Explorer or from the workform.
    - **Administration Explorer** - Display the workstation or staff member in the Explorer tree view. See "List workstations in the Explorer" on page 89 or "List staff members in the Explorer" on page 98. Then expand the folder for workstation or staff member, and select **Profiles** or **Parameters**. Change the settings in the details view on the right side of the Explorer. See "Set parameters or profiles from the Explorer" on page 17.
    - **Workstation or Staff Member workform** - Open the workform and go to the Parameters or Profiles view. See "Set parameters and profiles from a workform" on page 19.
- **Rotating staff** - Staff members who rotate among branches can be given permissions to log in at different branches, using that branch's Polaris settings. See "Special Permissions for Rotating Staff" on page 111. For more information about giving staff members permissions, see "Managing Permissions for Staff, Workstations, Groups" on page 126.
- **Staff client settings** - Certain settings, such as Polaris Find Tool functions, labels defaults, the organizations available when running reports, and preferred workform views, can be made at the staff member level. For more information, see "Setting Staff Client Profiles" on page 33.

- **Acquisitions/Serials settings** - The ability to override acquisitions and serials permissions blocks, route list defaults, fund list filters, and selection list defaults can be set at the staff member level. For more information, see the "Acquisitions Administration" in the *Polaris Acquisitions Guide 4.1R2*.
- **Cataloging settings** - Automated MARC validation, how classification and cutter numbers are handled in bibliographic and item records, field descriptions in the MARC editor, and the ability to override cataloging permissions blocks can be set at the staff member level. For more information, see the "Cataloging Administration" in the *Polaris Cataloging Guide 4.1R2*.
- **Patron Services settings -** The ability to override patron service (circulation) permissions blocks can be set at the staff member level. For more information, see the *Polaris Patron Services Administration Guide 4.1R2*.

List staff members in the Explorer

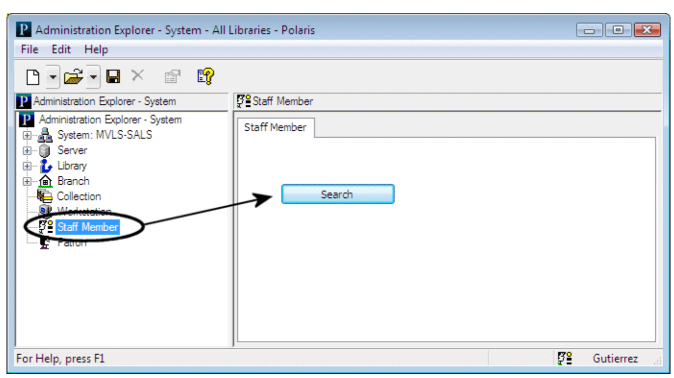
At the system level, staff members are not listed in the Administration Explorer because there may be many of them in the system. However, if you plan to work with several staff member records, it may be convenient to list them in the Administration Explorer so you do not have to search for each one. Follow these steps to list several or all the staff member records in the Administration Explorer tree view.

Note:
If you want to list the staff members for a specific branch, open the Administration Explorer at the branch level. Click + by the branch in the tree view, and click + by **Staff Member** under the branch. The staff members for the branch are listed. You can also run a report that lists all staff members in the system, organized by branch. See "Staff and Workstation Reports" on page 104.

Tip:
To work with a specific staff member record, select **Administration**, **Staff Member** on the Polaris Shortcut Bar, and use the Polaris Find Tool to search for and open the record. To work with multiple records, use the Administration Explorer.

1. Select **Administration**, **Explorer**, **System** on the Polaris Shortcut Bar.
2. Click **Staff Member** in the tree view of the Administration Explorer.

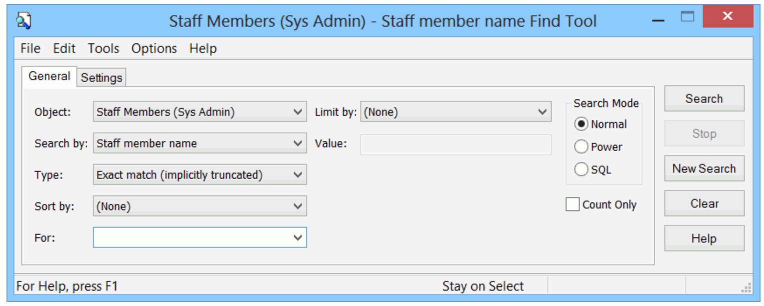
   A search button appears in the right pane of the Explorer.



3. Click **Search** to display the Polaris Find Tool.

4. Select **Staff Member Name** or **Staff Member ID** in the **Search By** box.

5. Type an asterisk ***** (for all) in the **For** box.



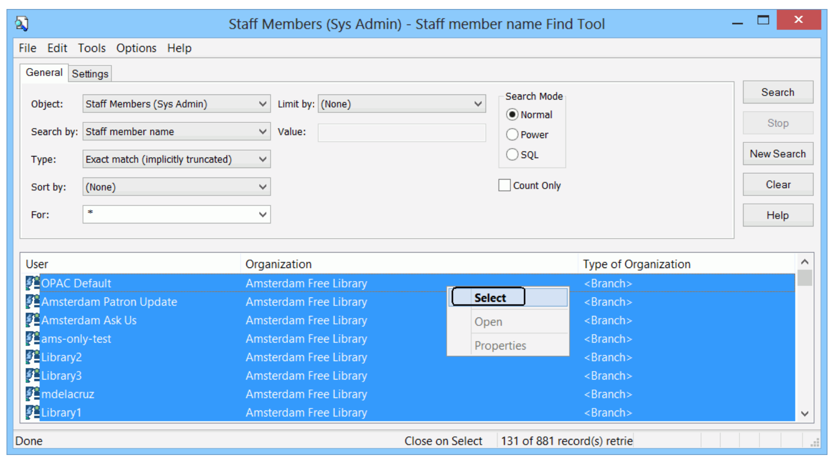
6. Click **Search** on the Find Tool.

   The staff member records are displayed in the results list.

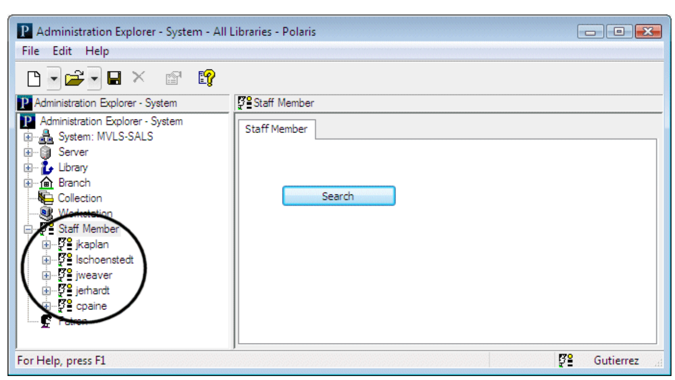
Tip:
If there are too many staff member records to display at once, the status bar indicates how many have been loaded. You can press **CTRL+SHIFT+A** to load the entire list.

7. Select the staff member records to list in the Explorer. You can use the **CTRL** or **SHIFT** key to select multiple staff member records.

8. Right-click in the results list, and choose **Select** from the context menu.



All the selected staff member records are listed under **Staff Member** in the Administration Explorer tree view.



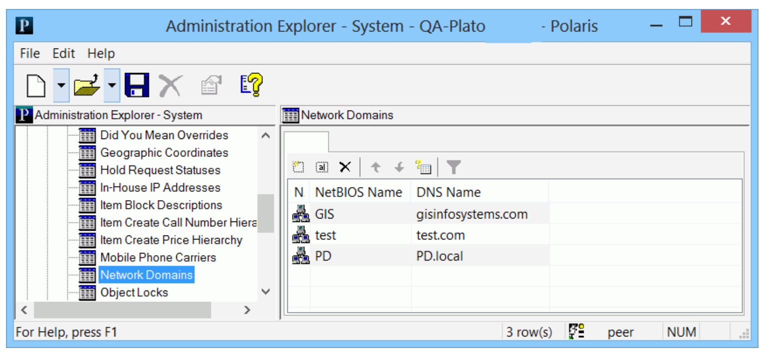
Related Information

- **New staff members** - See "Add a staff member record" on page 96.
- **Editing staff member settings** - You can edit staff member permissions and profiles directly from the Explorer. Expand the staff member folder in the tree view, and select **Profiles** or **Permissions**. The details view of the Explorer displays the profile or permission information. You can also open the Staff Member workform. Right-click the staff member name in the Explorer tree view, and select **Edit** from the context menu. For links to information about staff member settings, see "Add a staff member record" on page 96.
- **Suspending a staff member** - Click **Suspend** on the Staff Member workform. When this option is selected, the staff member cannot access Polaris, although the staff member record remains in the database. To allow access to Polaris, select **Active**.
- **Deleting a staff member** - Right-click the staff member name in the Explorer tree view, and select **Delete** from the context menu.

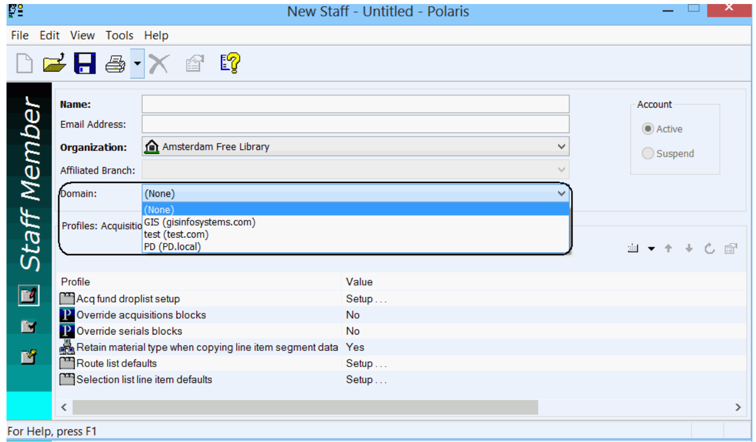
Multi-Domain System Support

Polaris user (staff member) and workstation names in a single Polaris system do not have to be unique across a multi-domain environment. In the multi-domain environment, the workstation and staff member are associated with a domain in Polaris, and while the domain\workstation or domain\user combination must be unique, the workstation and user names themselves may be repeated as long as they are in different domains. You can choose to associate users with domains, workstations with domains, both, or neither. However, in a single domain environment, user and workstation names must be unique.

In Polaris Administration, use the system-level Database table **Network Domains** to specify the NetBIOS Name and DNSName for each domain in your network. For general information about adding and modifying table rows, see "Working with Tables" on page 24. The System Administration permission **Modify network domains table: Allow** is required to work with this table. If you leave this table empty, users and workstations must be unique.

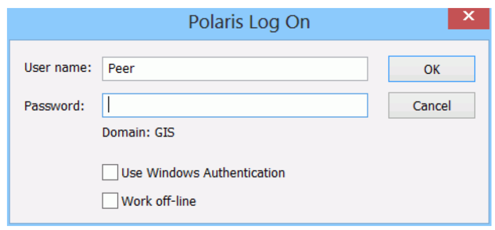


The entries in this table appear as selections in **Domain** drop-down lists in the Staff Member and Workstation workforms, where the domain is selected from the drop-down list to associate the user or workstation with the domain. If no domains have been entered in the Network Domains table, the field is not available for selection.

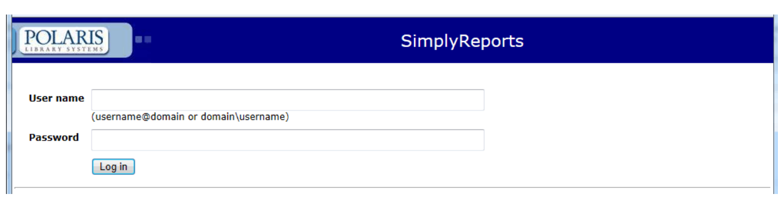


Your settings also apply to staff client and ExpressCheck client log-on with a Terminal Server connection.

- **Staff client Log On dialog box** - The domain is displayed on the Polaris Log On dialog box. You can also enter a domain in the **Name** field; for example, **Lib\Reid** or **reid@thelibrary.org**.



- **About Polaris dialog box** - When you select **Help, About Polaris** on the Polaris Shortcut Bar, the About Polaris dialog box includes the user domain in the **Polaris User** field, and the workstation domain in the **Polaris Workstation** field.
- **Web-based application log-ons** - Polaris Fusion, Simply Reports, and Polaris WebAdmin log-ons require the domain in the user name field in the format username@domain or domain\username; for example, **reid@thelibrary.org** or **Lib\Reid.**



See the following topic:

- “Network/Domain Requirements and Restrictions” on page 103

Network/Domain Requirements and Restrictions

- Polaris recommends that the domain computer and user accounts are configured in Active Directory.
- All Polaris Servers should be members of the same domain, or members of domains that include, minimally, a one-way trust. One-way trusts require that the application server be in the trustee domain. (For example, if domain A trusts domain B, the application server must reside in domain A, if domain A users are expected to use Polaris.)
- An external domain controller can be used to authenticate users if the domain controller is trusted by the domain(s) in which the Polaris Servers are members.
- If an application server is running in workgroup mode:
    - When configuring a user account that is a member of the workgroup, leave the **Domain** field set to **None** in the Staff Member record.
    - When configuring a computer account that is a member of the workgroup, leave the **Domain** field set to **None** in the Workstation record.
- When configuring a workstation that has a NetBIOS name different from the DNS hostname, leave the **Domain** field set to **None** in the Workstation record.
- When configuring a workstation that is also a Polaris server, leave the Domain field set to **None** in the Workstation record. The NetBIOS name of a computer running Polaris server-side software must be unique among all trusted domains.
- Each network domain configured in the Polaris Network Domains table must have a unique NetBIOS domain name.
- Each network domain configured in the Polaris Network Domains table must have a unique DNS domain name.
- Remote desktop:
    - If the staff client is run on a Windows terminal server via a remote desktop connection from a workstation that is a member of a trusted domain, then the remote desktop client workstation can be domain-specific.
- If the staff client is run on a Windows terminal server via a remote desktop connection from a workstation that is not a member of a trusted domain, then the remote desktop client workstation cannot be domain-specific.

Staff and Workstation Reports

You can generate reports that show the workstations and staff members registered in Polaris and the library organizations to which they are associated, and the transactions logged for these staff members and workstations.

See the following topics:

- "Polaris Tool Bar Reports" on page 104
- "Staff Client Log-On and Log-Off Transactions" on page 104

Polaris Tool Bar Reports

The following reports identify staff members and workstations registered in Polaris. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **System** in the Polaris Reports dialog box.

Note:
For information on generating reports, see "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*. For details about these reports, see "System Reports" in the *Polaris Basics Guide 4.1R2*.

- Affiliated Branches of Staff Members
- Hierarchy of Libraries, Branches & Workstations

Staff Client Log-On and Log-Off Transactions

Polaris includes transaction logging for staff client log-on and log-off transactions. You can track currently logged-on users when performing upgrades, and generate reports of historical usage of the software by user and/or workstation to assess staff client use.

The Polaris Workstations table records whether a workstation is logged on to the Polaris staff client, and includes the server date and time of the log-on. The following transactions are posted in the Transactions database and available for reporting:

Log-On (status = 1)

- Transaction TypeID = TR_SYS_LOGON (7200)
- OrganizationID - User's log-on branch
- Workstation ID
- User ID
- Transaction Client Date/Time
- Transaction SubtypeID = SUBSYSTEM_TYPE (235)
- Transaction SubtypeCode = Staff Client (33)

Log-Off (status = 0)

- Transaction TypeID = TR_SYS_LOGOFF (7201)
- OrganizationID - User's log-on branch
- Workstation ID
- User ID
- Transaction Client Date/Time
- Transaction SubtypeID = SUBSYSTEM_TYPE (235)
- Transaction SubtypeCode = Staff Client (33)

Log-off transactions include any way in which the user exits from the client, including but not limited to:

- Shortcut Bar - Click **X**
- Shortcut Bar - Select **File, Exit**
- Shortcut Bar - Select **File, Logoff**
- Shortcut Bar - Press **ALT+F4**
- Workform- Select **File, Exit**

For more information about reporting from the Transactions database, see "Polaris Transactions Database" on page 209.

Granting Permissions

Polaris permissions control who can access, create, modify, or delete specific record types and who can perform specific tasks in Polaris. Most permissions that control access to and modification of record types are set for the organization that owns the specific record. Permissions that control the ability to do specific tasks are typically set at the system level.

You can set up permissions based on the needs of the organizations in your system, and the tasks that staff members are expected to do. To allow administrators to control all records and functions in Polaris, you can set up certain staff members as "Superusers" or add these staff members to the Administrator permission group.

Examples:

- A check-out clerk cannot override circulation blocks, but the clerk's supervisor does have the permission to override a block.
- A large library system has staff members who work at different branches every day. The staff members have a set of permissions that are the same for all but one branch. That branch is more restrictive in its permissions, and does not give as many permissions to the rotating staff.
- A senior cataloger has permission to maintain authority records used by an entire library system. All other catalogers have permission to access the headings used in bibliographic records, but they cannot add any headings or change existing ones.
- A library system has a central acquisitions department, but individual branches maintain their own selection lists. The central acquisitions department can access each branch's selection lists, but only specific staff members at the branch can modify the lists.
- Each member library in a consortium prefers to keep its fund structure private. Libraries cannot view (access) each other's fund records.

When a staff member does not have the appropriate permission to do a patron services or circulation task, a permission block message appears. You can allow specific staff members (typically supervisors) to override certain permission blocks so the blocked staff member can continue the task. Set the following profiles for staff members as appropriate: **Override acquisitions blocks**; **Override serials blocks**; **Override cataloging blocks**; **Override patron services blocks**; and **Find Tool: Override SQL search blocks.**

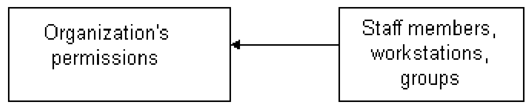
See the following topics:

- "Permission Strategies" on page 107
- "Managing Organization Security" on page 114
- "Managing Permissions with Permission Groups" on page 118
- "Managing Permissions for Staff, Workstations, Groups" on page 126
- "Setting Administration Permissions" on page 140

Permission Strategies

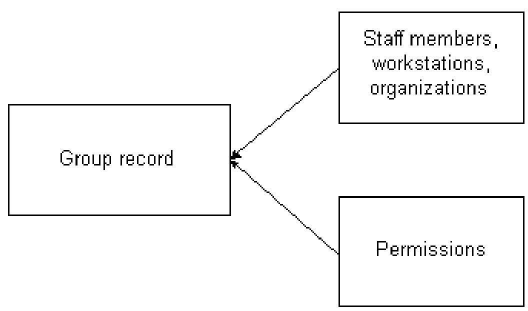
You can manage permissions in Polaris using any of the following methods, according to your needs:

- **Set security for an organization's records** - Identify who is allowed to view and use an organization's records. Expand the Security folder for the organization in the Administration Explorer, select a permission, then find and select the staff members, workstations, and permission groups that should have the permission. All the permissions that can be set at an organization level are listed under **Security** for the organization in the Administration Explorer. See "Managing Organization Security" on page 114.

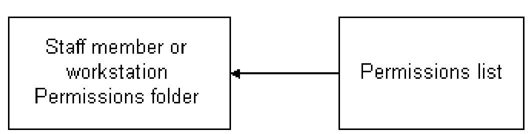


Tip:
If you are implementing Polaris permissions for the first time, the group method is a convenient strategy. See "Using Groups to Set Initial Permissions" on page 120.

- **Set up permission groups** - Set up permission groups with multiple permissions and add multiple staff members, workstations, and/or organizations to the group. You can add permissions to the group to give them to all group members, and add group members. For example, a Cataloging permission group might have most cataloging permissions except deleting records. If a new cataloger is joining the library, you can add her to the group to give her all the appropriate permissions in one step. See "Managing Permissions with Permission Groups" on page 118.



- **Set permissions for an individual staff member or workstation** - For example, a staff member who works in acquisitions needs permission to import brief bibliographic records using the Express Import option. See "Managing Permissions for Staff, Workstations, Groups" on page 126.



Important:
The PolarisSuperuser "staff member" and the Administrator permission groups have all permissions. The Superuser ensures there is always at least one person able to work in Polaris administration. Only one or two individuals should have access to this logon. The Administrator group simplifies giving Polaris administration permissions to backup administrators. Permissions cannot be taken away from the Superuser or Administrator permission groups, and these two records cannot be deleted.

See the following topics:

- "Permission Availability and Record Ownership" on page 108
- "Permissions for Tasks" on page 109
- "Assigning Permissions to Workstations" on page 110
- "Permission Assignments at Upgrade" on page 110
- "Special Permissions for Rotating Staff" on page 111
- "Special Permissions for SQL Searches in the Find Tool" on page 112

Permission Availability and Record Ownership

A specific set of permissions is available at the system, library, and branch level. While many permissions are set at the branch level, some permissions are available at all levels, and some are available only at the system level, only at the library level, or only at the branch level.

The permissions that control access and modifications to Polaris records can only be set at the organization level to which the record belongs. Some types of records can be owned at multiple organization administration levels. Other records can only be owned at a specific level. For example, item records can be owned at the system, library, and branch levels, but patron records can only be owned by a branch. Permissions to use item records are available and set independently at each level and for each organization. You set permissions for every organization that uses the associated records. Permissions to use patron records are available only at the branch level.

Important:
Bibliographic and item records can be maintained at the system, library, or branch level. Cataloging record permissions must be set for at least one organization. Typically, if the catalog is maintained by a central cataloging department for all organizations, the system level permissions are used. If each branch maintains its own cataloging records, assign the catalog record permissions for each branch.

Note:
See "Record Ownership Fields Reference" on page 268 for a list of the record fields that indicate ownership for each type of Polaris record.

Several levels of permissions control access to and operations on an organization's records. For example, you need the appropriate Access permission to view an organization's bibliographic records, or even see those records in lists such as Find Tool results. Separate Create, Modify, and Delete permissions control the ability to do these operations on the organization's bibliographic records.

Important:
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 cataloging record set, your user name is 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.

Some permissions are not organization-specific. These permissions are set at the system level and define access to options on the Polaris Shortcut Bar, access to specific tables in Polaris administration, or the ability to do certain tasks regardless of record ownership.

Permissions for Tasks

Most workflows in the Polaris staff client require multiple task permissions. See the following topics for the combinations of permissions needed to do specific functions:

- "Setting Administration Permissions" on page 140
- "Cataloging Workflow Permissions" in the *Polaris Cataloging Guide 4.1R2*
- "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*
- "Acquisitions Workflow Permissions" in the *Polaris Acquisitions Guide 4.1R2*
- "Serials Workflow Permissions" in the *Polaris Serials Guide 4.1R2*

You do not need to set all permissions for all organizations. If an organization does not do particular tasks, the permissions for that workflow do not need to be set for the organization. For example, if a branch does not use Polaris Acquisitions because selection, ordering, receiving, and invoicing are done at the main library, then the branch does not need acquisitions permissions.

Assigning Permissions to Workstations

The ability to do a task in Polaris depends on the permissions set for *both* the staff member and the workstation. For security, libraries may want to restrict the tasks that can be done on a particular computer, even if the person logged on has permission to do the tasks.

Example:
A computer monitor at a reference desk is visible to the public in that area. The library is concerned about patron privacy, and wants to prevent patron account information from appearing on that computer, so that workstation does not have permission to view the library's patron records.

You can set permissions for individual workstations, or you can use the following options:

- Create permission groups specifically for workstations and assign permissions based on the security or privacy requirements of the workstations in the group.

  Note:
  Do not put restricted workstations in permission groups with access to system security or patron information. To view a workstation's permissions, go the Permissions view of the Workstation workform. See "Managing Permissions for Staff, Workstations, Groups" on page 126.

- To give workstations and staff members the same permissions, make the workstations members of the same permissions groups to which the staff members belong. This method ensures a staff member can always do their tasks. However, do not use this method for computers where privacy and system security are issues.
- To give all workstations in an organization the permissions of a group, make the organization a member of the permission group.

  Important:
  The Polaris Superuser logon overrides any permission restrictions of a workstation. The Polaris Superuser can do any task on any workstation except access record sets owned by an individual staff member.

Permission Assignments at Upgrade

When you upgrade to a new version of Polaris, new permissions may or may not be granted to existing staff members by default. (New permissions are always granted to members of the Administrator permission group.) If you prefer not to accept any Polaris default settings that grant new permissions to existing staff members, set the system-level Staff Client profile **Permissions: Use Polaris-defined new permission defaults** to **No**. This setting causes all new permissions to be set to **No** (not granted) at upgrade, but does not affect existing permission assignments or the Administrator permission group. The default setting is **Yes**.

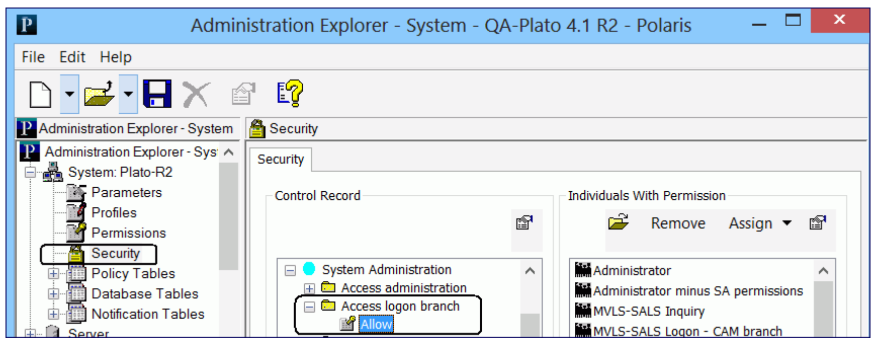
Important:
If you want to set the Staff Client profile **Permissions: Use Polaris-defined new permission defaults** to **No**, you must set the profile *before you upgrade to the new version of Polaris*.

Special Permissions for Rotating Staff

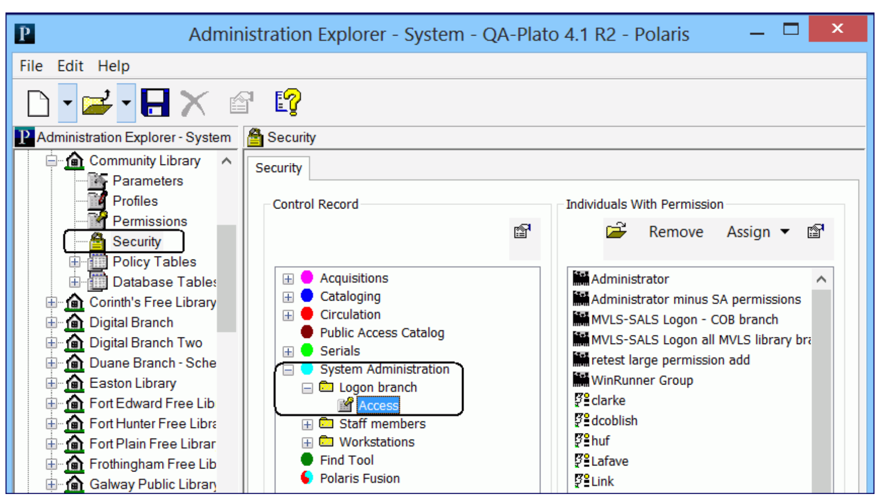
If the library rotates staff among branches, you can allow the rotating staff members to select a session branch at log-on. When a branch is selected, settings for that branch are in effect for the session (not the branch with which the staff member's user name is associated). For example, when a circulation staff member logs on to the current branch instead of the staff member's "home" branch, the system can route an item that fills a hold request correctly. The item is not routed to the staff member's "home" branch when it should be picked up at the current branch.

To enable staff members to select a branch at log-on, give both the staff member and the workstation these permissions:

- **Access logon branch: Allow** - Specifies who can log on to branches other than their own. The staff member can select a branch from a dialog box when logging on. This permission is set at the System level.



- **Logon branch: Access** - Specifies who can log on to a specific branch even though the staff member is not registered with the branch. The staff member can select a specific branch when logging in. This permission is set at the branch level.



The workstation's parent branch is the default selection in the Polaris Log On Branch dialog box. If the staff member does not have the **Logon branch: Access** permission for the workstation's branch, the default selection is the staff member's home branch. (If the staff member does not have the **Logon branch: Access** permission for the home branch, the first branch in the list of permissioned branches is the default selection.)

> **Note:**
> The user and logged-on branch for a Polaris staff client session are displayed at the top of the Polaris Shortcut bar and on the About Polaris dialog box (select **Help, About Polaris** on the Polaris Shortcut bar).

Special Permissions for SQL Searches in the Find Tool

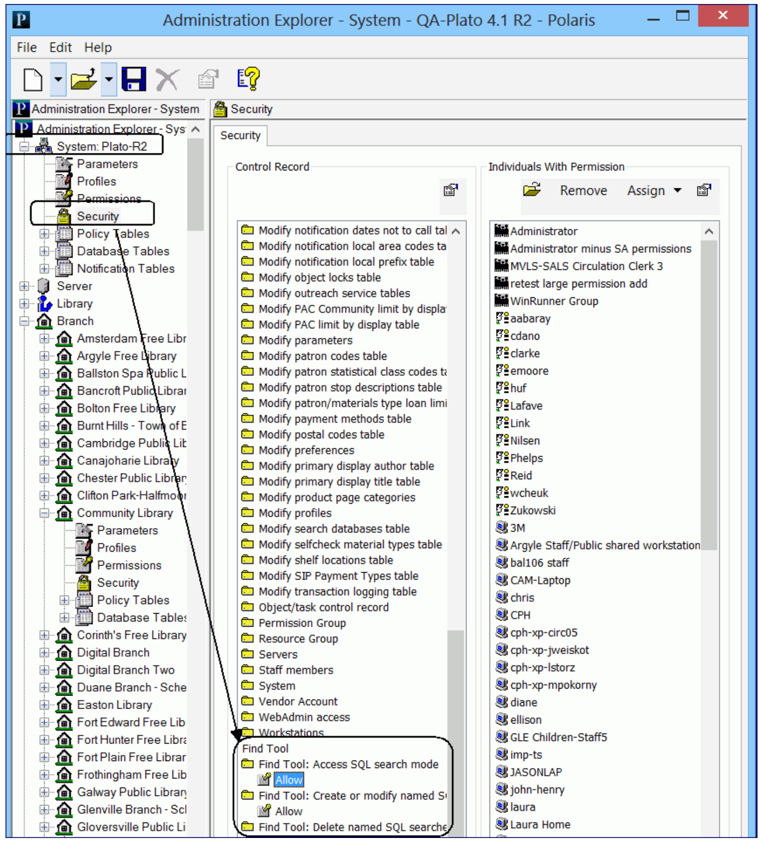
Three system-level permissions control the ability to use the Polaris Find Tool to do SQL searches. These permissions affect only the ability to do SQL queries in the Find Tool. No modifications to the database are possible from the Polaris Find Tool.

- **Find Tool: Access SQL mode - Allow** - The SQL option is available for selection on the Polaris Find Tool. The staff member can search in SQL mode.
- **Find Tool: Create or modify named SQL searches - Allow** - The **Save** and **Save As** options are available when the Find Tool is in SQL search mode. The staff member can save an SQL search and edit a saved search and save it.

  > **Note:**
  > If the staff member does not have this permission and selects **Save** or **Save As**, a permission block message appears. You can allow specific staff members to override the block. See "Set the Find Tool SQL permission blocks override" on page 200.

- **Find Tool: Delete named SQL searches - Allow** - The **Delete** option is available when the Find Tool is in SQL search mode. The staff member can delete a saved SQL search.

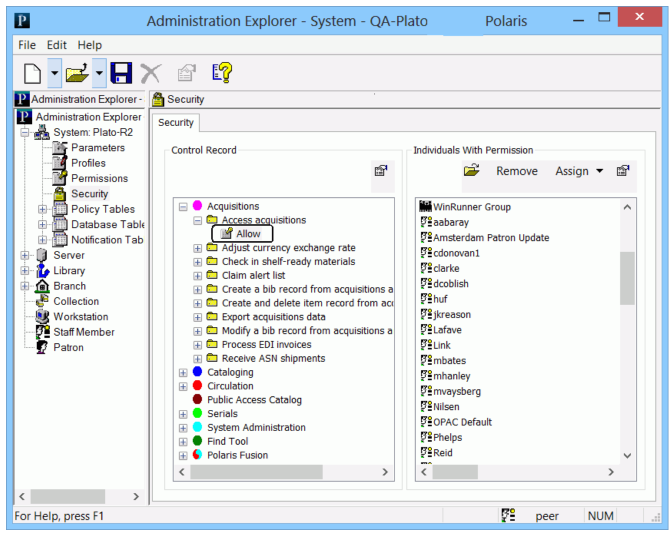
  > **Note:**
  > If the staff member does not have this permission and selects **Delete**, a permission block message appears. You can allow specific staff members to override the block. See "Set the Find Tool SQL permission blocks override" on page 200.


Administration Explorer - System - QA-Plato 4.1 R2 - Polaris
File Edit Help
System: Plato-R2
Security
Control Record
Individuals With Permission
Remove
Assign
Find Tool
Find Tool: Access SQL search mode
Allow

Managing Organization Security

Using the Security view on the Administration Explorer, you can list all the permissions available at each organizational level in Polaris. You can grant permissions at the system level for administration and centralized functions, and each library and branch can identify who is allowed to use the organization's records. In one step, you can add or remove multiple staff members, workstations, or permission groups for a selected permission at a particular organization.

In the Security view, the **Control Record** list displays all the permissions available for that level, organized in subsystem folders. The **Individuals with Permission** list displays all the staff members, workstations, and permission groups that have a selected permission.



Icons identify the following permission holders:

- - Staff member
- - Workstation
- - Permission Group

Note:
Entire organizations may have permissions based on permission group membership. The Permissions view for an organization lists the permissions that are granted to the specific organization due to its membership in a permission group. See "Managing Permissions with Permission Groups" on page 118.

See the following topic:

- "Manage organization security settings" on page 115

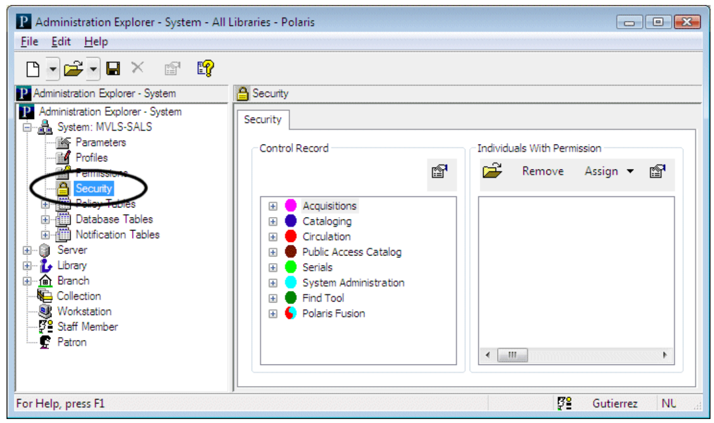
Manage organization security settings

Follow these steps to see the staff members, workstations, and permission groups that have permissions to do specific tasks for an organization, and to add or remove permissions assignments.

Tip:
If you are setting permissions for the first time, set the Staff Client profile **Generate security history** to **No**. After security implementation is complete, set the profile to **Yes** so you can track changes to permission assignments. See "Setting Staff Client Profiles" on page 33. To see the security history for a permission, right-click the permission in the **Control Record** list and select **Properties** from the context menu.

1. In the Administration Explorer tree view, expand the organization for which you want to review permission assignments.
2. Select **Security** under the organization name.

   The Security view appears in the details pane.

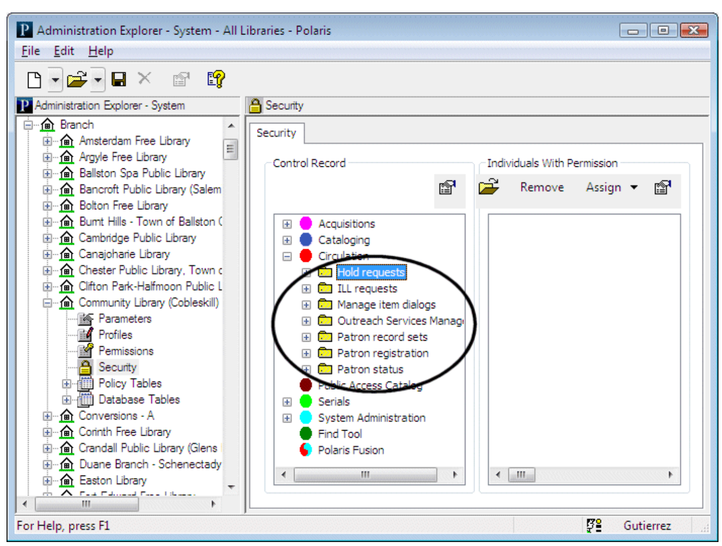


3. In the **Control Record** list, select the permission for which you want to review assignments by doing the following actions:

Tip:
To display all the permissions for a subsystem, select the subsystem name in the **Control Record** list, and press **SHIFT+ALT+*** (use the * key on the numeric keypad). You can use the up and down arrow keys to review the assignments for the expanded subsystem permissions.

a) Expand the appropriate folder.

   The list of permission categories (control records) for the selected subsystem is displayed under the subsystem name.

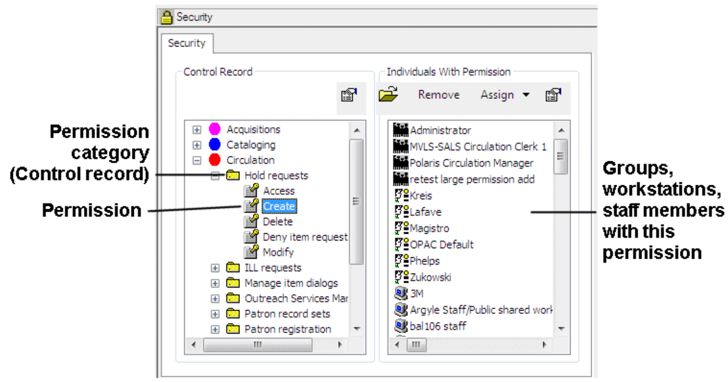


b) Expand the permission category for the permission you want to review.

The list of permissions for the selected permission category is displayed under the category.

c) Select the permission.

The permission groups, workstations, and staff members that have the selected permission for the organization are displayed in the **Individuals With Permissions** list.

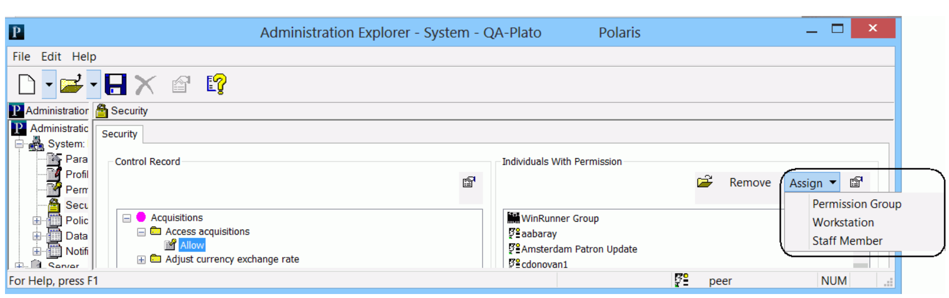


4. To view additional information about the permission or the assigned "individuals," do any of the following actions:

- **Display the properties of the selected permission** - Right-click a permission, and select **Properties**.
- **Display a permission group, workstation, or staff member record** - Select the record you want to view, and click [icon] in the **Individuals With Permissions** list tool bar. The record opens.
- **Display the properties of a permission group, workstation, or staff member record without opening the record** - Select the record, and click [icon] in the **Individuals With Permissions** list tool bar.

5. To assign a selected permission, follow these steps:

a) Click **Assign** to display the Assign menu.



b) Select **Permission Group**, **Workstation**, or **Staff Member**.

The Polaris Find Tool appears.

c) Specify the search criteria, and click **Search**.

d) From the results list, select the permission group, workstation, or staff member to which you want to give the permission, and choose **Select** from the context menu. To select multiple items from the results list, press **CTRL** while you select the items.

The selections are displayed in the **Individuals With Permission** list.

6. To remove assignments for a selected permission, do these steps:

a) From the **Individuals with Permission** list, select the permission groups, staff members, and workstations you want to remove. To select multiple items, press **CTRL** while you select the items.

b) Click **Remove** in the **Individuals with Permission** tool bar.

The selections are removed from the list, and no longer have the permission assignment.

7. If you changed the permission assignments, select **File, Save** to record the changes.

Note:
To see the effects of any permission changes in the staff client, exit the staff client and log back in.

Related Information

- **Reference information about specific permissions** - See the online Help index or the following topics for information about specific Polaris permissions:
  - "System Administration Permissions Reference" on page 233
  - "Circulation Permissions Reference" in the *Polaris Patron Services Administration Guide 4.1R2*
  - "Acquisitions Permissions" in the *Polaris Acquisitions Guide 4.1R2*
  - "Cataloging Permissions" in the *Polaris Cataloging Guide 4.1R2*
  - "Serials Permissions" in the *Polaris Serials Guide 4.1R2*
- **View all permissions for a specific staff member, workstation, or permission group** - Open the appropriate workform and select **View, Permissions.** See "Managing Permissions for Staff, Workstations, Groups" on page 126.

Managing Permissions with Permission Groups

You can set up groups of staff members and workstations that are involved in the same types of tasks in the library, and assign the permissions to the group. For example, you can set up a Circulation Clerk permission group with the required permissions for circulating items. Then, you simply add the staff members and workstations to the Circulation Clerk permission group.

Permission group records are managed using the Permission Group workform. You can find and open a permission group record from the Polaris Shortcut Bar (select **Administration**, **Permission Group**), or the Administration Explorer menu bar (select **File**, **Open**, **Permission Group**).

Note:
To set up and manage groups, you need the **Permission Group** permissions (Access, Create, Delete, Modify), and permission to access any associated staff member, workstation, or organization records.

See the following topics:

- "Group Permissions for Organizations" on page 119
- "Default Permission Groups" on page 119
- "Using Groups to Set Initial Permissions" on page 120
- "Create a new permission group" on page 121
- "Copy a permission group" on page 123
- "Manage permission group membership" on page 133

Group Permissions for Organizations

You can assign entire organizations (system, library, branch) to permission groups. Every staff member and workstation that is assigned to the organization gains the permissions of the group. Organization membership in a permission group is best used for library systems that use centralized cataloging, acquisitions, and serials processing. You can create a permission group that has access-only permissions for bibliographic, item, authority, serial control records, then make the entire system the member of the permission group. Every staff member and workstation for every organization in the Polaris installation automatically has access to the records. However, they cannot modify, create, or delete the records, and you probably would not assign these types of permissions through organization group membership.

Note:
If a library is a member of a permission group, the staff members and workstations assigned to the library *and its branches* receive the group permissions. If a branch is a member of a permission group, only the staff members and workstations assigned to the branch receive the group permissions.

Default Permission Groups

Polaris is installed with default permission groups that already have many of the permissions needed to do common library workflows at all organizations. All you need to do is identify the staff and workstations that are members of the permission group. You can add or remove permissions from a default group to suit an organization's staff departmental structure and workflows. If you want stricter security, you can copy the default permission group, remove the permissions that do not apply to the new group, and give the permission group a different name.

Example:
In a system where each library needs to control access to patrons' personal information, you can copy the Polaris Circulation Clerk permission group and give it a name that identifies it for a circulation desk at a specific library. Remove the permissions that do not apply to the specific library. Include the circulation staff at the library as members of the new group. Repeat the process for each library that requires strict control of privacy information.

The names of the Polaris default permission groups begin with **Polaris**. To list the default permission groups in the Find Tool results list, search by name for **Polaris***.

For a list of the default permission groups and the permissions associated with them, see "Polaris Permission Groups - Default Permissions Reference" on page 247.

Using Groups to Set Initial Permissions

If you are setting up Polaris permissions for the first time, you may find this method useful:

1. Make lists of the following information:
   - All organizations (system, libraries, and branches)

     Note:
     A library must also have a branch of the same name. See "Setting Up Organizations" on page 40.
   - Departments for each organization
   - Staff members in each department
   - Supervisors or managers of each department
   - Workstation names and where they are used

   These lists help identify how many permission groups you may need to set up, and the possible members of the groups. Every department for each organization may be a group. You may want a supervisor group for each department, or combine all supervisors into a single group at each organization. You probably need a Circulation clerk group at every branch.

2. Review areas of organizational responsibilities, and compile a list of functional areas in each department.

   Work such as administration, cataloging, serials processing, or acquisitions in large library systems or consortia may be centralized. In this case, you may need a single permission group for catalogers. If each library is responsible for its own technical services, you may need multiple cataloging groups, one for every library that maintains its own cataloging records.

   Certain departments may have several functional areas, so they may need a finer division of group responsibilities. For example, a Technical Services department may need a permission group for catalogers and a separate permission group for the people doing acquisitions and serials processing. The list may be based on work area or job descriptions.

3. See the following topics for the permissions needed to do common workflows. These may help you define where you need permission groups:
   - "Setting Administration Permissions" on page 140
   - "Cataloging Workflow Permissions" in the *Polaris Cataloging Guide 4.1R2*
   - "Setting Circulation Permissions" in the *Polaris Patron Services Administration Guide 4.1R2*
   - "Acquisitions Workflow Permissions" in the *Polaris Acquisitions Guide 4.1R2*
   - "Serials Workflow Permissions" in the *Polaris Serials Guide 4.1R2*

4. Compile a list of permission groups based on the information you have gathered, and the decisions you have made.
5. Create the permission groups in Polaris Administration, or adapt the Polaris default groups. See “Managing Permissions with Permission Groups” on page 118.
6. Set the Staff Client profile **Generate security history** to **No** until you have completed initial permissions setup. See “Setting Staff Client Profiles” on page 33.
7. Give each group the permissions needed to do the tasks for the purpose of the group. See “Assign permissions to staff, workstation, or group” on page 128.
8. Assign the members to each permission group. See “Manage members in a permission group” on page 124.
9. Ask a member from each permission group to test the setup by doing their normal tasks.

Create a new permission group

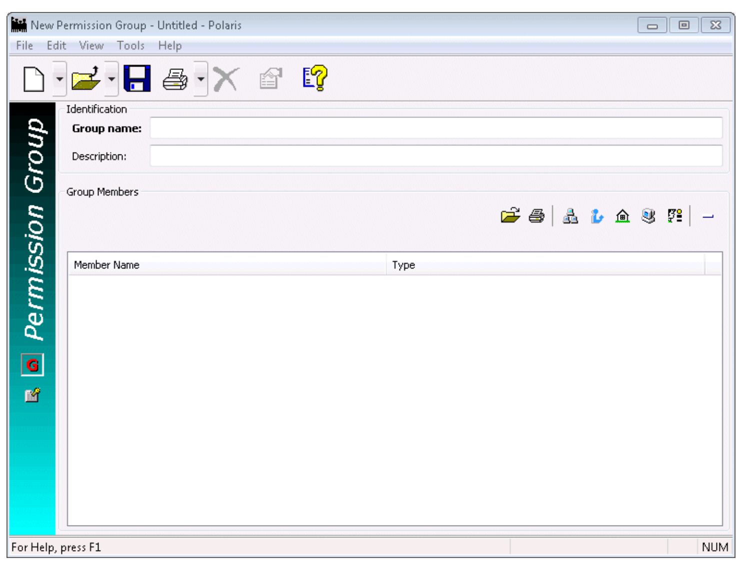
Follow these steps to add a new permission group to Polaris Administration.

Note:
You can also create a permission group by copying an existing group and then editing its members and permissions. See “Copy a permission group” on page 123.

Tip:
If you are setting permissions for the first time, set the Staff Client profile **Generate security history** to **No**. After security implementation is complete, set the profile to **Yes** so you can track changes to permission assignments. See “Setting Staff Client Profiles” on page 33. To see the security history for a permission, right-click the permission in the **Control Record** list (Administration Explorer, **Security**) and select **Properties** from the context menu.

1. Open the Administration Explorer, and select **File, New, Permission Group** from the Explorer menu bar.

   The New Permission Group workform appears.



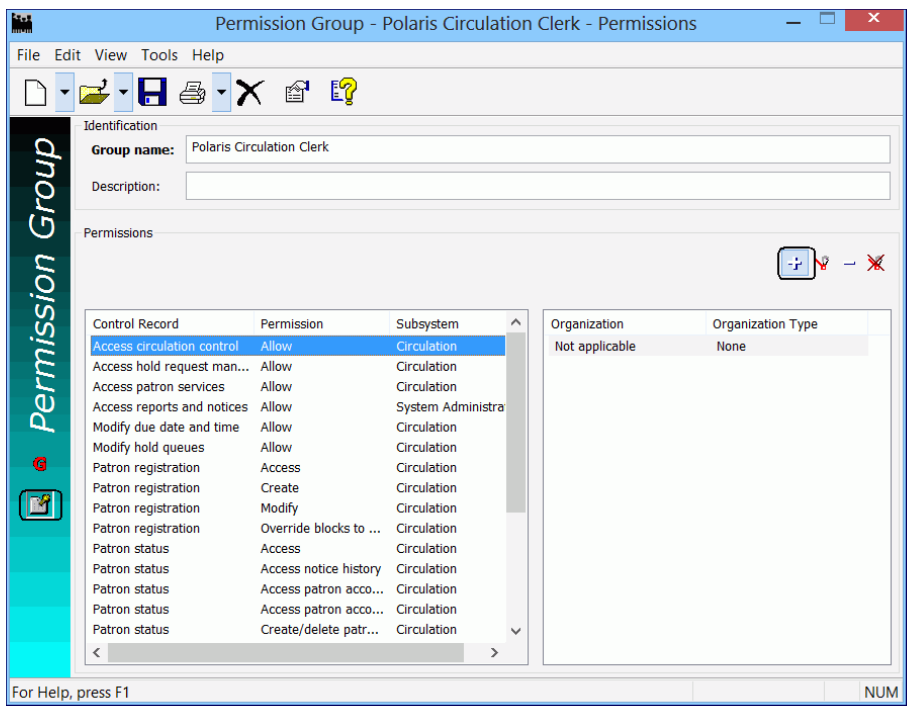
Tip:
If you are creating standard permission groups for multiple libraries and branches, start the name with the organization's abbreviation, followed by a brief title. The description can specify a standard purpose. This allows you to sort permission groups by their organization (**Name** column) or by function (**Description** column) in the Polaris Find Tool results list.

2. Type a unique name for this permission group in the **Group name** box.
3. Specify the purpose of the group in the **Description** box.
4. Identify the staff members, workstations, and organizations that are members of this permission group. For details, see "Manage members in a permission group" on page 124.
   - To add the system organization, click .
   - To add a library, click .
   - To add a branch, click .

   Note:
   Adding an organization (system, library, branch) to a permission group means that every staff member and workstation directly assigned to the organization has the permissions granted to the group. The **Organization** box on the Staff workform and the **Parent Branch** box on the Workstation workform define where the staff member or workstation is directly assigned.

   - To add a workstation, click .
   - To add a staff member, click .
5. Select **View, Permissions** and click above the **Is Permitted To** list to add permissions to the group. For details, see "Assign permissions to staff, workstation, or group" on page 128.

Tip:
The left side of the Permissions view displays the currently-assigned permissions (if any). When you select a permission that is organization-specific, the organizations are loaded on the right side.



6. Select **File, Save** to add the new permission group.

   Note:
   To see the effects of your permission changes in the staff client, exit the staff client and log back in.

Copy a permission group

You can copy a permission group, including a default group, rename it, and add or remove members and permissions. Follow these steps to copy any permission group.

> **Important:**
> You can edit the membership and permissions for the Polaris default permission groups directly. See "Manage members in a permission group" on page 124 and "Assign permissions to staff, workstation, or group" on page 128. However, if you want to keep the default permission group record intact, copy the group, then edit the copy. Rename your copy so that it is not overwritten during a Polaris upgrade.

1. Open the Administration Explorer, and select **File, Open, Permission Group** from the Explorer menu bar.

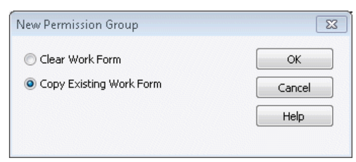
   The Polaris Find Tool appears.

> **Tip:**
> The names of Polaris default permission groups begin with **Polaris**. To list all the default groups in the results list, search for **Polaris***.

2. Search for the permission group you want to copy.
3. Right-click the permission group in the results list, and select **Open** from the context menu.

   The Permission Group workform appears.
4. From the workform menu bar, select **File, New, Permission Group**.

   The New Permission Group dialog box appears.



5. Select **Copy Existing Work Form**, and click **OK**.

   The open permission group workform, including its existing members, is copied to the new permission group.

   > **Note:**
   > Permissions are not copied. You must specifically assign them to the new group.
6. Type a new name for the group in the **Group name** box. See "Create a new permission group" on page 121.
7. Edit the group description, membership, and permissions as required. See the following topics:
   - "Manage members in a permission group" on page 124
   - "Assign permissions to staff, workstation, or group" on page 128
8. Select **File, Save** to save the new permission group.

   For a list of the default groups and the permissions assigned to them, see "Polaris Permission Groups - Default Permissions Reference" on page 247.

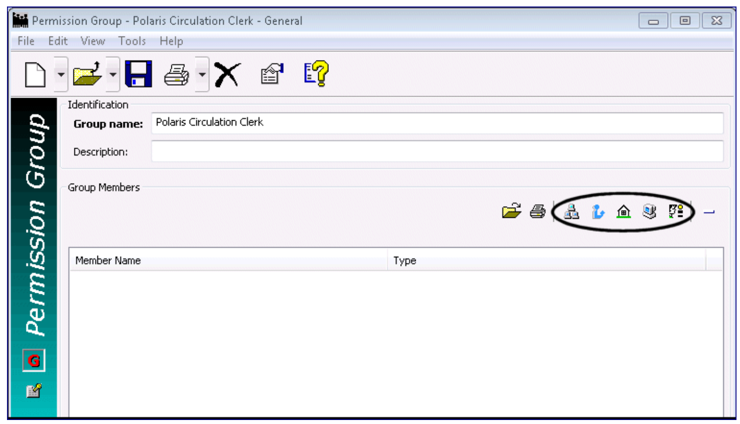
1-2-3

Manage members in a permission group

Follow these steps to add and remove group members.

1. Select **File, Open, Permission Group** on the Administration Explorer menu bar to display the Polaris Find Tool.
2. Search for the group for which you want to change membership.
3. Right-click the group in the results list, and select **Open** from the context menu.

   The Permission Group workform appears.
4. On the General view, select the type of member to add:



Tip:
You can right-click in the Group Members list, and select the member type from the context menu.

   - To add the system organization, click .
   - To add a library, click .
   - To add a branch, click .

     Note:
     Adding an organization (system, library, branch) to a group means that every staff member and workstation directly assigned to the organization has the permissions granted to the group. The **Organization** box on the Staff workform and the **Parent Branch** box on the Workstation workform define where the staff member or workstation is directly assigned.
   - To add a workstation, click .
   - To add a staff member, click .

   The Polaris Find Tool appears. The record type you selected is displayed in the **Object** box.
5. In the **For** box, type the name of the staff member, workstation, or organization that you want to add as a member of the group, and click **Search**.

   The results list is displayed.
6. From the results list, select the staff members, workstations, or organizations you want to add to the group. Use **SHIFT** or **CTRL** to select multiple items.

7. Right-click in the results list, and choose **Select** from the context menu.

   The Permission Group workform is displayed, and the selected staff members, workstations, or organizations are listed in the **Group Members** list.

   Note:
   When you add a staff member or workstation to a permission group, Polaris compares permissions directly assigned to the staff member or workstation with the permissions of the group. If a duplicate permission is found, the permission from the group automatically replaces the directly-assigned permission. However, when you add an entire organization to a group, the duplicate permission check is not done on staff members or workstations assigned to the organization.

8. To remove a member from the permission group, select the names you want to remove, and click – above the **Group Members** list.

   When staff members and workstations are removed from a permission group, they lose the permissions they gained from the group. If duplicate directly-assigned permissions were removed when the staff members or workstations were added to the group, the permissions are not restored when the staff members or workstations are removed from the group.

9. Select **File, Save** to save your changes to the **Group Members** list.

Related Information

- **Manage group memberships for a staff member, workstation, or organization from the workform** - See "Manage permission group membership" on page 133.
- **Acquire group memberships from other staff members or workstations** - See "Copy (acquire) permission group memberships" on page 135.

Managing Permissions for Staff, Workstations, Groups

The Permissions view for a specific group, staff member, or workstation lists all the permissions that have been assigned to the record. You can add or remove multiple permissions that apply to several organizations in a single operation. You can also see which permissions are directly assigned and which permissions are assigned through group membership. The Permissions view also lists the groups in which a staff member or workstation is a member. You can change the group membership by adding memberships, copying group memberships from another record, or removing group memberships.

You can display the Permissions view by selecting **Permissions** under a workstation or staff member in the Administration Explorer tree view, or by selecting **View, Permissions** in a workform. To work with a permission group record, you must open the Permission Group workform.

Note:
To work with workstation, staff, and Permission Group permissions, you must have **Access** and **Modify** permissions for the appropriate record type (including Permission Groups) and for **Object/task control record.**

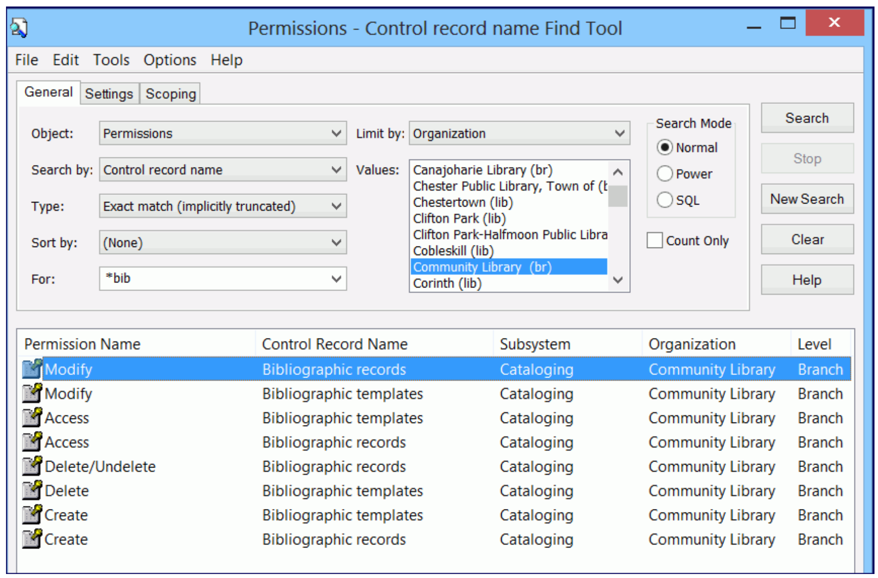
See the following topics:

- "Finding Permissions" on page 127
- "Assign permissions to staff, workstation, or group" on page 128
- "Copy (acquire) permission settings" on page 132
- "Manage permission group membership" on page 133
- "Copy (acquire) permission group memberships" on page 135
- "Remove directly-assigned permissions" on page 136
- "Remove selected group-assigned permissions" on page 136

Finding Permissions

To find permissions, first open the Staff, Workstation, or Permission Group workform, go to the Permissions view, and click . See “Assign permissions to staff, workstation, or group” on page 128. You can use the Find Tool options to do precise searches and sort the permissions.

Example:
Find all permissions related to Community Library’s bibliographic records:
Object = Permissions
By = **Control Record Name**
Type = **Exact match (implicitly truncated)**
For = *bib
Limit by: Organization, Community Library



You can search for permissions using the following access points and values. These same access points are also available as **Limit by** filters in the Find Tool.

Search By (mnemonic)	*Purpose*	*Values*
Control Record Name (CRN)	Finds permissions by their control record name (the category name listed in the Security view of the Administration Explorer). This search finds both object and task permissions.	Type the name of any permission control record in the **For** box. Examples: **Bibliographic records, Item records, Renew items, Modify free days.**
Organization (ORG)	Finds permissions that can be set by an organization.	Type an organization name in the **For** box.

Search By (mnemonic)	*Purpose*	*Values*
Permission Name (PNAME)	Finds permissions by their action type.	Any text in the **For** box is valid. **Common actions:** Access, Allow, Create, Delete, Modify. **Less common actions:** Adjust, Approve, Cancel, Change, Check-in, Convert, Credit, Deny, Display, Override, Pay, Print, Renew, Release, Send, Transfer, Uncheck-in.
Subsystem (SUBSYS)	Finds permissions by their associated subsystem.	Type any of the following names in the **For** box: Acquisitions, Cataloging, Circulation, Public Access Catalog, System Administration, Serials, Find Tool, Polaris Fusion

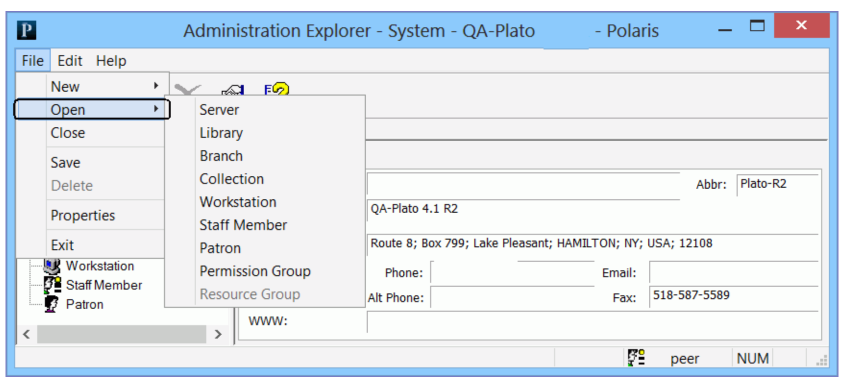
Assign permissions to staff, workstation, or group

Follow these steps to add permissions to a staff member, workstation, or group.

Note:
If you are setting permissions for the first time, set the Staff Client profile **Generate security history** to **No**. After security implementation is complete, set the profile to **Yes** so you can track changes to permission assignments. See “Setting Staff Client Profiles” on page 33. To see the security history for a permission, right-click the permission in the **Control Record** list (Administration Explorer, **Security**) and select **Properties** from the context menu.

Tip:
In the Administration Explorer tree view, you can expand a listed workstation or staff member and select **Permissions** to display the Permissions view. To work with a group record, you must find and open the Permission Group workform.

1. Open the Administration Explorer, and select **File**, **Open** from the Explorer menu bar.



2. Select the record type (**Permission Group**, **Staff Member**, or **Workstation**).

   The Polaris Find Tool opens.

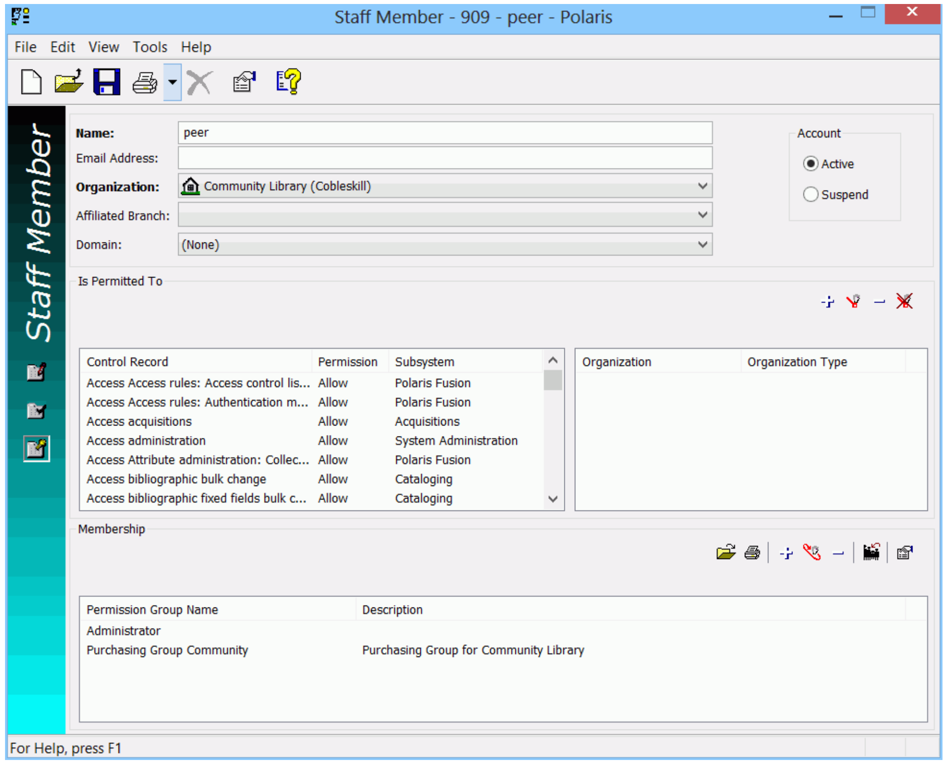
3. Search for the administration record.

4. Right-click the record in the results list, and select **Open** from the context menu.

   The workform appears.

Tip:
You can sort the list by clicking a column head. Sorting can take some time because there may be thousands of permissions. Wait until the sorting operation is complete before you proceed.

5. Select **View, Permissions** or click to display the permission list for the record.



Tip:
The left side of the workform lists the currently assigned permissions (control records). When you select a permission that is organization-specific, the organizations are loaded on the right side of the workform. When you select a permission that is not organization-specific (task control record), the Organization list on the right side displays a **Not Applicable** message.

6. Click above the **Is Permitted To** list.

   The Polaris Find Tool appears.

7. Set the search criteria that identify the permissions you want to add, and click **Search**. See "Finding Permissions" on page 127.

8. From the results list, select the permissions you want to assign.

   Use **SHIFT** or **CTRL** to select multiple items. Click a column heading to sort the list.

9. Right-click a highlighted permission, and choose **Select** from the context menu.

   The workform is displayed, and the selected permissions are listed in the **Is Permitted To** list.

10. Select **File, Save** to record your changes.

Note:
To see the effects of your permission changes in the staff client, exit the staff client and log back in.

Related Information

- **Reference information about specific permissions** - See the online Help index or the following topics for information about specific Polaris permissions:
    - "System Administration Permissions Reference" on page 233
    - "Circulation Permissions Reference" in the *Polaris Patron Services Administration Guide 4.1R2*
    - "Serials Permissions" in the *Polaris Serials Guide 4.1R2*
    - "Cataloging Permissions" in the *Polaris Cataloging Guide 4.1R2*
    - "Serials Permissions" in the *Polaris Serials Guide 4.1R2*
- **Removing permissions** - See "Remove directly-assigned permissions" on page 136.
- **Copying permissions** - See "Copy (acquire) permission settings" on page 132.
- **Changing group membership** - See "Manage permission group membership" on page 133.
- **Permission reports** - Two permission reports are available from the reports menu under **Utilities, Reports and Notices, System**:
    - The Staff Member Permissions report lists the type of record or task for which the staff member has permissions; the permission (modify, access, create, delete, allow, etc.); the subsystem; the library organization; and the organization name (system, library, branch).

Staff Member Permissions

For Staff Member: peer Member ID: 909

Control Record	Permission	Subsystem	Organization	Organization Type
Fiscal years	Modify	Acquisitions	Community Library	Branch
Funds	Access	Acquisitions	Community Library	Branch
Funds	Create	Acquisitions	Community Library	Branch
Funds	Delete	Acquisitions	Community Library	Branch
Funds	Modify	Acquisitions	Community Library	Branch
Funds	Transfer money between funds	Acquisitions	Community Library	Branch
Hold requests	Access	Circulation	Community Library	Branch
Hold requests	Create	Circulation	Community Library	Branch
Hold requests	Delete	Circulation	Community Library	Branch
Hold requests	Deny item request	Circulation	Community Library	Branch
Hold requests	Modify	Circulation	Community Library	Branch
Hold requests	Modify PAC display note	Circulation	Community Library	Branch
ILL requests	Access	Circulation	Community Library	Branch
ILL requests	Convert holds	Circulation	Community Library	Branch
ILL requests	Delete	Circulation	Community Library	Branch
ILL requests	Modify	Circulation	Community Library	Branch
Import bibliographic, item and authority records	Allow	Cataloging	Not applicable	None
Import profiles	Access	Cataloging	QA-Plato 4.1 R2	System
Import profiles	Create	Cataloging	QA-Plato 4.1 R2	System
Import profiles	Delete	Cataloging	QA-Plato 4.1 R2	System
Import profiles	Modify	Cataloging	QA-Plato 4.1 R2	System

The Staff Member Permission Comparison report displays permissions that two staff members do not share. Any permissions that the staff members have in common do not appear in the report.

Staff Member Permission Comparison

(First) Staff Member: Zukowski Member ID: 895

Control Record	Permission	Subsystem	Organization	Organization Type

(Second) Staff Member: peer Member ID: 909

Control Record	Permission	Subsystem	Organization	Organization Type
Modify NCIP Fiscal Action Types table	Allow	System Administration	Not applicable	None
Modify NCIP Payment Types table	Allow	System Administration	Not applicable	None
Modify SIP Payment Types table	Allow	System Administration	Not applicable	None
Picklist application	Allow	Circulation	Not applicable	None

Copy (acquire) permission settings

Only directly-assigned permissions can be acquired from one permission group, workstation, or staff member to another. Permissions that were assigned through group membership cannot be acquired. Follow these steps to assign permissions to a target record by acquiring a set of directly-assigned permissions from another record.

Tip:
You can list a workstation or staff member in the Administration Explorer (see "List workstations in the Explorer" on page 89 and "List staff members in the Explorer" on page 98), then select **Permissions** for the workstation or staff member in the tree view of the Explorer. The Permissions view is displayed in the right side of the Explorer.

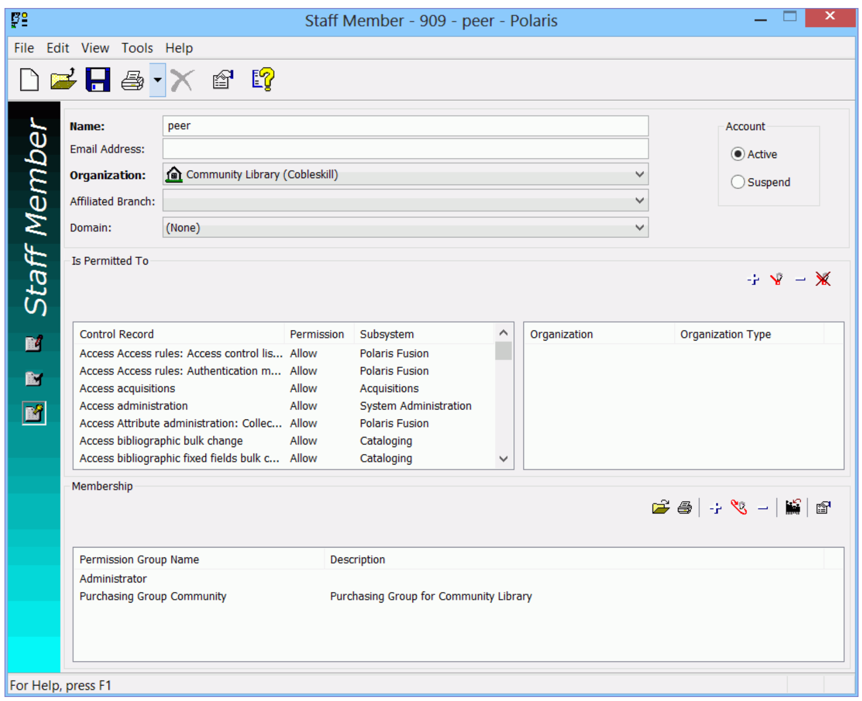
1. Select **File, Open** on the Administration Explorer menu bar, and specify the record type (**Permission Group**, **Staff Member**, or **Workstation**).

   The Polaris Find Tool opens.

2. Search for the target record.
3. Right-click the record in the results list, and select **Open** from the context menu.

   The workform appears.

4. Select **View, Permissions** or click to display the **Is Permitted To** list for the group, staff member, or workstation.



5. Click (Acquire) above the list.

   The Polaris Find Tool appears.

6. Search for the group, workstation, or staff member record from which you want to acquire permissions.

   The Find Tool results list is displayed.

7. In the results list, right-click the record from which you want to acquire permissions, and choose **Select** from the context menu.

   The Find Tool closes, and the permissions from the selected record are added to the **Is Permitted To** list for the target record. The existing permissions remain. Any duplicate permissions from the source record are not copied.

8. Select **File, Save**.

   Note:
   To see the effects of your permission changes in the staff client, exit the staff client and log back in.

Related Information

"Copy (acquire) permission group memberships" on page 135

Manage permission group membership

Follow these steps to add or remove permission group memberships for an organization, workstation or staff member.

1. Select **File**, **Open** on the Administration Explorer menu bar, and specify the record type (**Library**, **Branch**, **Staff Member**, or **Workstation**) to find.

   The Polaris Find Tool opens.

2. Search for the record.

3. Right-click the record in the results list, and select **Open** from the context menu.

   The workform appears.

4. Select **View, Permissions** to display the **Is Permitted To** list and the **Membership** list.

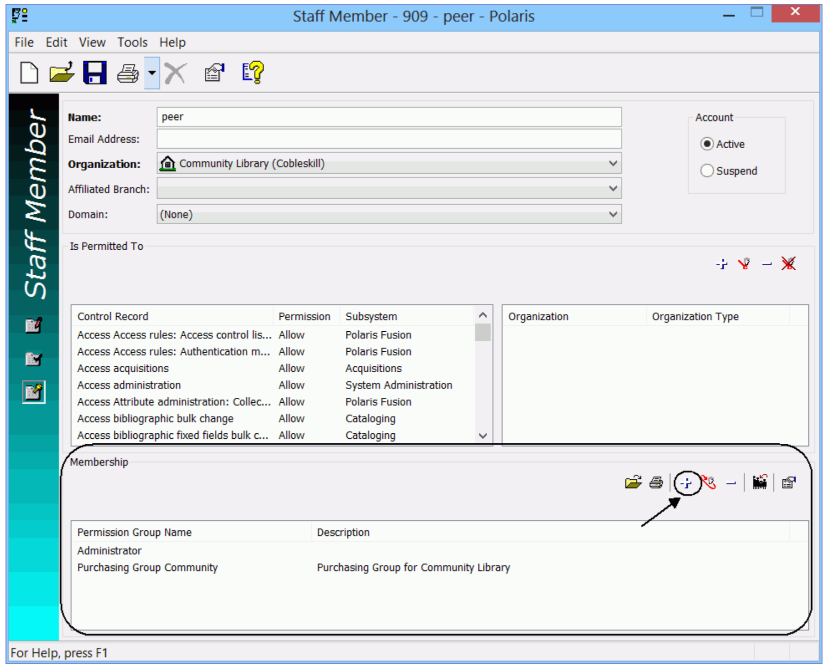
   The **Membership** list shows the groups to which the organization, workstation, or staff member belongs.

   Note:
   When you open the Permissions view of the workform, the **Membership** list shows all permission groups to which the organization, workstation, or staff member belongs. But if you select a permission from the permissions list, and the organization, workstation, or staff member has that permission due to group membership, the **Membership** list shows that permission group. Once a permission is selected, the **Membership** list no longer displays all the permission groups to which the organization, workstation, or staff member belongs. If the permission was granted to the organization, workstation, or staff member directly, and not received as a member of a group, nothing shows in the **Membership** list when that permission is selected.

   Click  (**Show my group membership**) above the **Membership** list to re-list all the groups to which the organization, workstation, or staff member belongs.

5. To add the organization, workstation, or staff member to a permission group, do the following actions:

   a) Click above the **Membership** list.



   The Polaris Find Tool appears.

   b) Search for the group to which you want to add the record.

Tip:
You can sort the results list by clicking a column heading.

   c) In the results list, right-click the group, and choose **Select** from the context menu. Use **SHIFT** or **CTRL** to select multiple permission groups.

   The Permissions view is displayed, and the selected permission group is listed in the **Membership** list.

6. To remove the record from a permission group, select the group from which you want to remove the record, and click above the **Membership** list.

   The selected permission group is removed from the **Membership** list, and the organization, workstation, or staff member loses all the permissions that were assigned by membership in that permission group.

7. Select **File, Save**.

Related Information

- **General information about groups** - See "Managing Permissions with Permission Groups" on page 118.
- **Edit group membership from a Permission Group workform** - See "Manage members in a permission group" on page 124.

Copy (acquire) permission group memberships

Follow these steps to assign permission group memberships to a workstation or staff member by copying them from another workstation or staff member.

Tip:
You can list the workstation or staff member in the Administration Explorer. See "List workstations in the Explorer" on page 89 and "List staff members in the Explorer" on page 98. Then select **Permissions** for the workstation or staff member in the tree view of the Explorer. The Permissions view is displayed in the right side of the Explorer.

1. Select **File, Open** on the Administration Explorer menu bar, and specify the record type (**Staff Member** or **Workstation**) to find.

   The Polaris Find Tool opens.

2. Search for the administration record.
3. Right-click the record in the results list, and select **Open** from the context menu.

   The appropriate workform appears.

4. Select **View, Permissions** to display the **Is Permitted To** list and the **Membership** list.

   The **Membership** list shows the permission groups to which the workstation or staff member belongs.

   > **Note:**
   > When you open the Permissions view of the workform, the **Membership** list shows all groups to which the workstation or staff member belongs. If you select a permission from the permissions list, and the workstation or staff member has that permission due to permission group membership, the **Membership** list shows that group. Once a permission is selected, the **Membership** list no longer displays all the permission groups to which the workstation or staff member belongs. If the workstation or staff member was granted the permission directly, and did not receive the permission as a member of a group, nothing shows in the **Membership** list when that permission is selected. Click (**Show my group membership**) above the **Membership** list to re-list all the permission groups to which the workstation or staff member belongs.

5. Click (Acquire group memberships) above the **Membership** list.

   The Polaris Find Tool appears.

6. Search for the workstation or staff member whose permission group memberships you want to copy.
7. In the results list, right-click the workstation or staff member, and choose **Select** from the context menu.

   The Permissions view is displayed. The permission groups to which the source workstation or staff member belongs are listed in the **Membership** list.

Remove directly-assigned permissions

Follow these steps to remove directly-assigned permissions from a permission group, workstation, or staff member.

> **Note:**
> You cannot use this procedure to remove an individual permission from a record if the permission was assigned by virtue of a group membership. To remove these permissions, see “Remove selected group-assigned permissions” on page 136.

1. Select **File**, **Open** on the Administration Explorer menu bar, and specify the record type (**Permission Group**, **Staff Member**, or **Workstation**).

   The Polaris Find Tool opens.

2. Search for the administration record.
3. Right-click the record in the results list, and select **Open** from the context menu.

   The workform appears.

4. Select **View**, **Permissions** to display the **Is Permitted To** list.

   You can sort the list by clicking a column heading. Use **SHIFT** or **CTRL** to select multiple permissions.

5. Select the permissions you want to remove, and click above the **Is Permitted To** list. To remove all permissions, click .
6. Select **File**, **Save.**

> **Note:**
> To see the effects of your permission changes in the staff client, exit the staff client and log back in.

Remove selected group-assigned permissions

To remove group-assigned permissions for a specific staff member without affecting the permissions for all group members, copy the Permission Group workform, acquire only the permissions you want to give the staff member, and then remove the staff member from the original permission group.

Follow these steps to remove group-assigned permissions.

> **Note:**
> To remove *all* the permissions assigned by group membership, see “Manage permission group membership” on page 133.

1. Select **File**, **Open** on the Administration Explorer menu bar, and specify the record type (**Staff Member** or **Workstation**) to find.

   The Polaris Find Tool opens.

2. Search for the record from which you want to remove the permission.
3. Right-click the record in the results list, and select **Open** from the context menu.

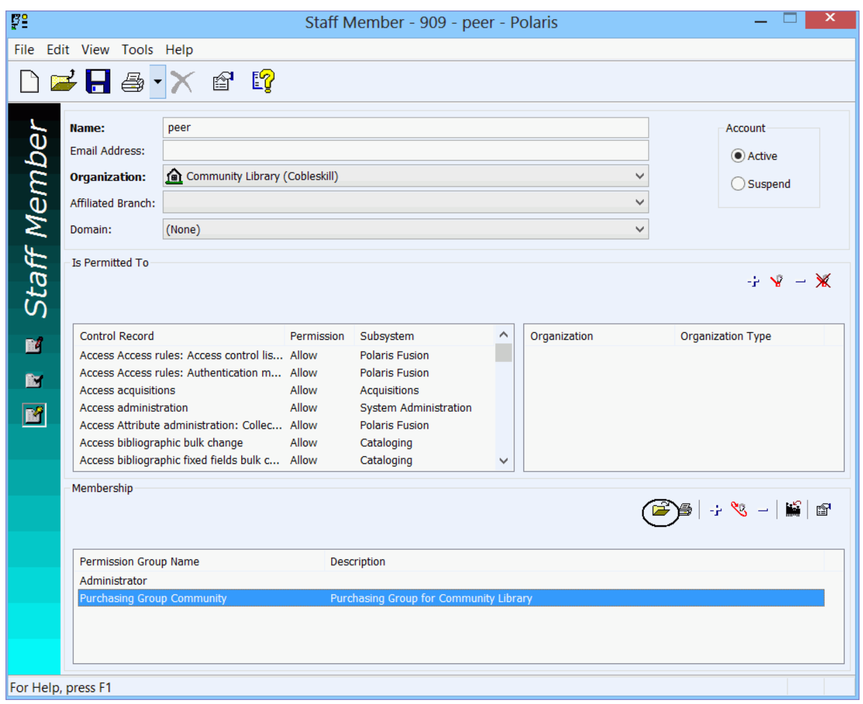
The appropriate workform appears.

4. Select **View, Permissions** to display the **Is Permitted To** list and the **Membership** list.

   The **Membership** list shows the permission groups to which the workstation or staff member belongs.

   > **Note:**
   > When you open the Permissions view of the workform, the **Membership** list shows all permission groups to which the workstation or staff member belongs. If you select a permission from the permissions list, and the workstation or staff member has that permission due to permission group membership, the **Membership** list shows that permission group. Once a permission is selected, the **Membership** list no longer displays all the permission groups to which the workstation or staff member belongs. If the workstation or staff member was granted the permission directly, and did not receive the permission as a member of a permission group, nothing shows in the **Membership** list when that permission is selected.
   >
   > Click (**Show my group membership**) above the **Membership** list to re-list all the permission groups to which the workstation or staff member belongs.

5. In the **Membership** list, select the group that includes the permission(s) you want to remove, and click .



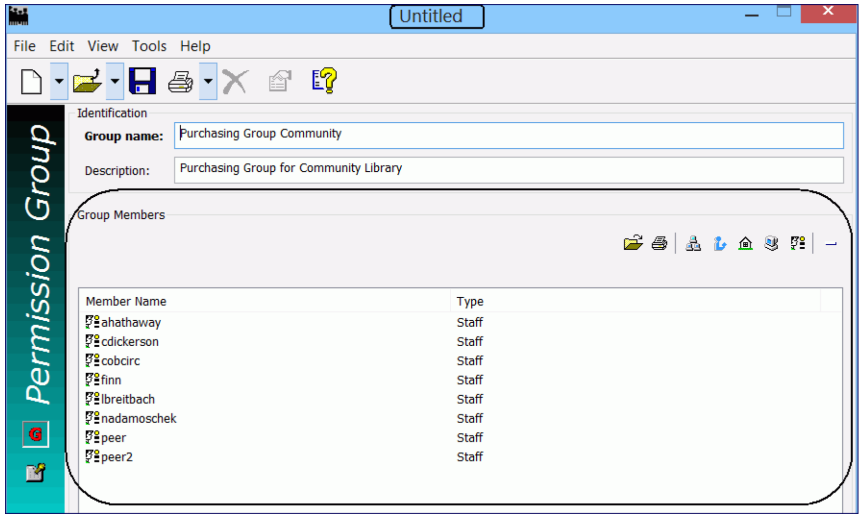
The Permission Group workform opens.

6. From the workform menu bar, select **File, New, Permission Group**.

   The New Permission Group dialog box appears.

7. Select **Copy Existing Work Form**, and click **OK**.

   The new Permission Group workform is displayed with **Untitled** in the title bar, and the same members as the original permission group listed under **Group Members**.



8. Type a new name for the group in the **Group name** box.

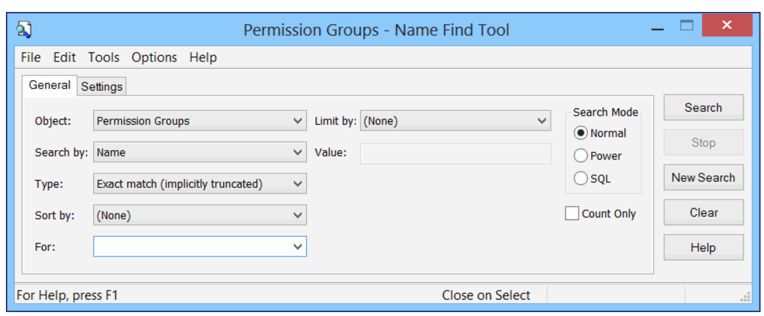
9. Select **File, Save**.

10. Select **View, Permissions** or click .

11. Acquire the original group’s permissions by following these steps:

   a) Click  (Acquire) above the Permission List.

   The Polaris Find Tool appears with Permission Groups selected in the Object box.

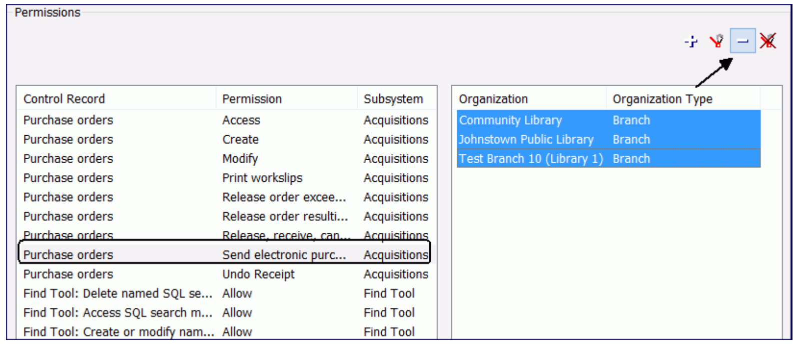


   b) Search for the original permission group.

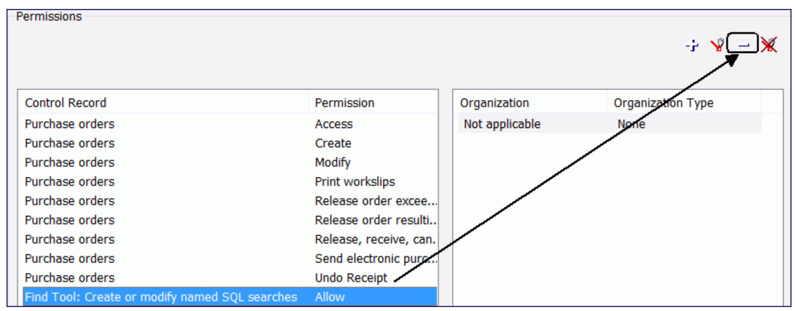
   c) In the results list, right-click the original permission group record, and choose **Select** from the context menu.

   The permissions from the original group are added to the **Permissions** list.

12. Select the permission(s) you want to remove as follows:
    - If the permission is organization-specific, the organizations for which it is set appear on the right side of the window. You can select the permission for multiple organizations at once.



    - If the permission is not organization-specific, select it in the left side of the window.



13. Click [–] above the **Permissions** list.
14. Select **File, Save**.
15. Select **View, General**, or click [G].
16. In the **Group Members** list, select the members that should not belong to this new group, and click [–] above the **Group Members** list. Be sure to *retain* the workstation or staff member that needs the altered permission list.
17. Select **File, Save**.
18. Return to the workstation or staff member record.
19. Select the old permission group in the **Membership** list, and click [–] to remove the workstation or staff member record from the old group.
20. Select **File, Save**.

Setting Administration Permissions

Administration permissions control access to the various workforms, tables, and controls needed to administer Polaris. Typically, Polaris administrators need the administration permissions. However, other staff members may require access to certain administration tables and controls to set up specific processes. For example, senior catalogers may require administration permissions related to MARC validation. To assign administration permissions, you must have the following permissions:

- **Access administration: Allow**
- **System: Access**
- **Object/task control record: Access**
- **Object/task control record: Modify**

Most administration permissions are set at the system level. You can use the Security view at the system level on the Administration Explorer, or set the permissions from individual group, workstation, and staff member workforms. See "Administration Workflow Permissions" on page 143 for information about combinations of permissions needed for specific administrative tasks. See "System Administration Permissions Reference" on page 233 for a complete list and descriptions of the permissions for administering Polaris.

Even with specific System Administration permissions set at the system level, you also need access permissions to an administration level (**System: Access**; **Library: Access**; **Branch: Access**) to change any parameters or profiles for those levels. However, granting access to any level allows administration access to *all* organizations at that level, so be cautious in assigning administrative permissions. For large installations, you may need to distribute the work load, but you should limit access to system-level administration to only a few people. Other administrators can do most administration functions with access limited to the Library or Branch administration levels.

Note:
You may want to add the primary Polaris administrators to the Administrators group, in case the Polaris SuperUser logon is unavailable. The Administrators group has all permissions.

See the following topics:

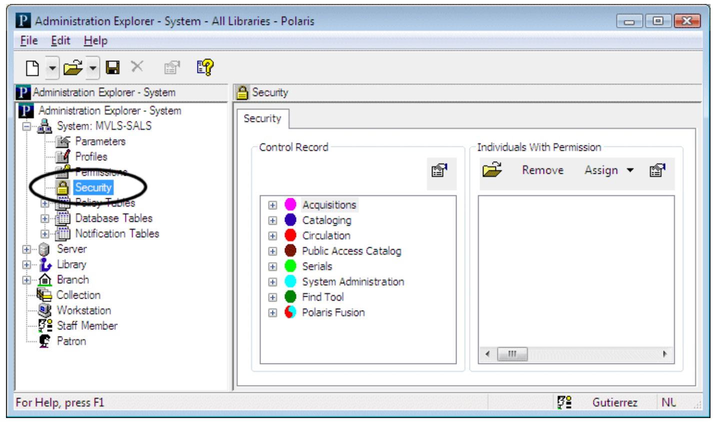
- "Grant administration permissions" on page 141
- "Administration Workflow Permissions" on page 143

Grant administration permissions

Follow these steps to assign the permissions that control access to Polaris administration.

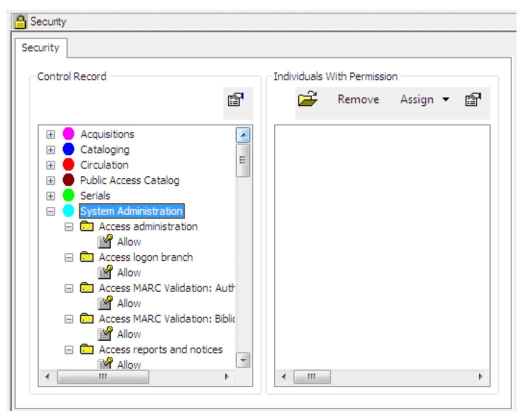
1. In the Administration Explorer, select **Security** for the System level.

   The Security view is displayed.



2. Select (highlight) **System Administration** in the **Control Record** list, and press **ALT+*** (on the numeric key pad).

   The System Administration permission tree expands to display all the System Administration permissions.



3. Identify who can set permissions. See "Permissions to Set Permissions" on page 143.

4. Identify who can maintain organizational information. See "Organization Maintenance Permissions" on page 143.

5. Identify who can maintain group, workstation, and staff member records. See "Permission Group, Workstation, Staff Member Record Permissions" on page 145.

6. Identify who can work with cataloging administration tables. See "Cataloging Administration Permissions" on page 146.

7. Identify who can work with circulation administration tables. See "Circulation Administration Permissions" on page 147.

8. Identify who can work with public access search and display tables. See "Public Access Administration Permissions" on page 149.

9. Identify who can work with acquisitions tables. See "Acquisitions Administration Permissions" on page 149.

10. Select **File, Save** to save any changes.

Related Information

- **General information about permissions** - See "Permission Strategies" on page 107.
- **Specific System Administration permissions** - See "System Administration Permissions Reference" on page 233.
- **Using the Security view** - See "Managing Organization Security" on page 114.
- **Permission Groups** - See "Managing Permissions with Permission Groups" on page 118.
- **Setting permissions from a workform** - See "Managing Permissions for Staff, Workstations, Groups" on page 126.

Administration Workflow Permissions

This section lists the combinations of permissions needed for specific administration workflows.

Note:
For an alphabetical list of all System Administration permissions, see "System Administration Permissions Reference" on page 233. For more information about setting permissions in Polaris, see "Permission Strategies" on page 107.

Workflow	*Required Permissions*	*Administration Explorer Security Location*
Permissions to Set Permissions		
Authorize others to set permissions	Access administration: Allow	System - System Admin
	Object/task control record: Access	System - System Admin
	Object/task control record: Modify	System - System Admin
	Staff members: Access	System, Library, Branch - System Admin
	System: Access	System - System Admin
	Workstations: Access	System, Branch - System Admin
Maintain security for a library. These permissions are required to allow individuals to set local permissions.	Access administration: Allow	System - System Admin
	Object/task control record: Access	System - System Admin
	Object/task control record: Modify	System - System Admin
	Libraries: Access	System - System Admin
	Branches: Access	System - System Admin
	Groups: Access	System - System Admin
	Staff members: Access	System, Library, Branch - System Admin
	Workstations: Access	System, Library, Branch - System Admin
Maintain permissions for groups, staff members, and workstations	Access administration: Allow	System - System Admin
	Object/task control record: Access	System - System Admin
	Object/task control record: Modify	System - System Admin
	Permission Groups: Access	System - System Admin
	Staff members: Access	System, Library, Branch - System Admin
	Workstations: Access	System, Library, Branch - System Admin
Organization Maintenance Permissions		
Create new organizations	Access administration: Allow	System - System Admin
	Branches: Access	System - System Admin
	Branches: Create	System - System Admin
	Libraries: Access	System - System Admin
	Libraries: Create	System - System Admin

Workflow	*Required Permissions*	*Administration Explorer Security Location*
Maintain resource groups	Access administration: Allow Resource Group: Access Resource Group: Create Resource Group: Delete Resource Group: Modify	System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin
Maintain system organizational information	Access administration: Allow Modify parameters: Allow Modify profiles: Allow System: Access System: Modify	System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin
Administer system-wide address and contact information (add these permissions to the system maintenance permissions). These permissions can be added to library-level and branch-level administration permissions, but any changes apply to the entire system.	Access tables: Allow Modify address table: Allow Modify contact persons table: Allow Modify countries table: Allow Modify dates closed table: Allow Modify postal codes table: Allow	System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin
Administer record operations and transactions (add these permissions to the system maintenance permissions). These permissions can be added to library-level and branch-level administration permissions.	Access tables: Allow Modify object locks table: Allow Modify transaction logging table: Allow	System - System Admin System - System Admin System - System Admin
Maintain and change organizational information	Access administration: Allow Branches: Access Branches: Modify Libraries: Access Libraries: Modify	System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin
Maintain organizational parameters and profiles	Access administration: Allow Branches: Access Libraries: Access Modify parameters: Allow Modify profiles: Allow	System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin
Administer collections	Access administration: Allow Collections: Access Collections: Create Collections: Delete Collections: Modify	System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin

Workflow	*Required Permissions*	*Administration Explorer Security Location*
Administer servers	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify search databases table: Allow	System - System Admin
	Servers: Access	System - System Admin
	Servers: Modify	System - System Admin
	Servers: Create	System - System Admin
	Servers: Delete	System - System Admin
Permission Group, Workstation, Staff Member Record Permissions		
Administer staff members	Access administration: Allow	System - System Admin
	Modify parameters: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
	Staff members: Access	System, Library, Branch - System Admin
	Staff members: Create	System, Library, Branch - System Admin
	Staff members: Modify	System, Library, Branch - System Admin
	Staff members: Delete	System, Library, Branch - System Admin
Administer permission groups. Access to Libraries and Branches can be added to administer permission groups.	Access administration: Allow	System - System Admin
	Permission Groups: Access	System - System Admin
	Permission Groups: Create	System - System Admin
	Permission Groups: Modify	System - System Admin
	Permission Groups: Delete	System - System Admin
	Staff members: Access	System, Library, Branch - System Admin
	Workstations: Access	System, Library, Branch - System Admin
Administer workstations	Access administration: Allow	System - System Admin
	Modify parameters: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
	Workstations: Access	System, Library, Branch - System Admin
	Workstations: Create	System, Library, Branch - System Admin
	Workstations: Modify	System, Library, Branch - System Admin
	Workstations: Delete	System, Library, Branch - System Admin

Workflow	*Required Permissions*	*Administration Explorer Security Location*
Cataloging Administration Permissions		
Set automatic bib and authority re-indexing during next server upgrade	Access MARC Re-index during next server upgrade: Allow	System - System Admin
Set MARC validation rules and policies	Access administration: Allow Modify profiles: Allow Access MARC Validation: Authority: Allow Access MARC Validation: Bibliographic: Allow MARC Validation: Authority - insert row: Allow MARC Validation: Authority - modify row: Allow MARC Validation: Authority - delete row: Allow MARC Validation: Bibliographic - insert row: Allow MARC Validation: Bibliographic - modify row: Allow MARC Validation: Bibliographic - delete row: Allow	System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin
Set duplicate catalog record detection criteria	Access administration: Allow Access tables: Allow Modify bibliographic deduplication table: Allow Modify bibliographic tags to retain/delete tables: Allow Modify authority overlay retention table: Allow Modify authority record import: preferred cataloging source: Allow	System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin
Set miscellaneous catalog record policies	Access administration: Allow Access tables: Allow Modify call number hierarchy table: Allow Modify item price hierarchy table: Allow Modify item block descriptions table: Allow Modify initial articles table: Allow Modify import blackout times	System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin System - System Admin
Set label configuration profiles	Access administration: Allow Modify profiles: Allow You may limit access to a subset of these levels: Branches: Access Libraries: Access System: Access Workstations: Access Staff members: Access	System - System Admin System - System Admin Various levels - System Admin

Workflow	*Required Permissions*	*Administration Explorer Security Location*
Circulation Administration Permissions		
Set up circulation codes and labels (add these permissions to the system maintenance permissions). These permissions can be added to library and branch level administration permissions, but any changes apply to the entire system.	Access tables: Allow	System - System Admin
	Modify circulation status table	System - System Admin
	Modify claim reason table: Allow	System - System Admin
	Modify fee descriptions table: Allow	System - System Admin
	Modify fine codes table: Allow	System - System Admin
	Modify hold status table: Allow	System - System Admin
	Modify item block descriptions table: Allow	System - System Admin
	Modify patron codes table: Allow	System - System Admin
	Modify patron stop descriptions table: Allow	System - System Admin
	Modify material types table: Allow	System - System Admin
	Modify loan period codes table: Allow	System - System Admin
	Modify patron statistical class codes table: Allow	System - System Admin
	Modify NCIP User Privilege Types table: Allow	System - System Admin
Maintain circulation limits, rates, and schedules (add these permissions to the system maintenance permissions). These permissions can be added to library and branch level administration permissions.	Access tables: Allow	System - System Admin
	Modify fines table: Allow	System - System Admin
	Modify loan periods table: Allow	System - System Admin
	Modify patron/materials type loan limit blocks table: Allow	System - System Admin
	Modify payment methods table: Allow	System - System Admin
Set policies for floating collections	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify floating material type limits table: Allow	System - System Admin
	Modify floating material types table: Allow	System - System Admin
	Modify floating to branch table: Allow	System - System Admin
Maintain self-check attributes	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify self check material types table: Allow	System - System Admin
	System: Access	System - System Admin

Workflow	*Required Permissions*	*Administration Explorer Security Location*
Maintain notice settings	Access administration: Allow	System - System Admin
	Access reports and notices: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
	Modify notification dates not to call table: Allow	System - System Admin
	Modify notification local area codes table: Allow	System - System Admin
	Modify notification local prefix table: Allow	System - System Admin
	System: Access	System - System Admin
Maintain hold request routing schedule	Access administration: Allow	System - System Admin
	System: Access	System - System Admin
	Access tables: Allow	System - System Admin
	Modify holds routing sequence table: Allow	System - System Admin
Edit hold request status descriptions	Access administration: Allow	System - System Admin
	System: Access	System - System Admin
	Access tables: Allow	System - System Admin
	Modify hold status table: Allow	System - System Admin
Set up and maintain course reserve functions	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify course reserve tables: Allow	System - System Admin
	Modify parameters: Allow	System - System Admin
Specify mobile phone service carriers for selection in the Patron Registration workform and when patrons register or update their account information from the PAC	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify mobile phone carriers: Allow	System - System Admin
Set up and maintain outreach service functions	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify outreach services tables: Allow	System - System Admin
	Modify parameters: Allow	System - System Admin
Map NCIP privileges and medium types to Polaris patron codes and item material types	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify NCIP medium types incoming table: Allow	System - System Admin
	Modify NCIP medium types outgoing table: Allow	System - System Admin
	Modify NCIP user privilege types table: Allow	System - System Admin

Workflow	*Required Permissions*	*Administration Explorer Security Location*
Public Access Administration Permissions		
Maintain catalog results settings	Access administration: Allow	System - System Admin
	System: Access	System - System Admin
	Access tables: Allow	System - System Admin
	Modify shelf locations table: Allow	System - System Admin
	Modify cross reference display constants table: Allow	System - System Admin
	Modify item availability display order table: Allow	System - System Admin
Maintain catalog search settings	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify search databases table: Allow	System - System Admin
	System: Access	System - System Admin
Set up and modify override phrases for Did You Mean search suggestions in the PAC	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify did you mean overrides table: Allow	System - System Admin
Set up PAC displays for bibliographic and community information searches and search results	Access administration: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
	Modify bibliographic record title displays: Allow	System - System Admin
	Modify modify community record title displays: Allow	System - System Admin
	Modify and create display entities: Allow	System - System Admin
	Modify product page categories: Allow	System - System Admin
	Modify PAC limit by display table: allow	System - System Admin
	Modify PAC community limit by display table: allow	System - System Admin
	System: Access	System - System Admin
Enter or edit geographic coordinates for organizations that might be displayed with the Map It (Google Maps) feature in Polaris PowerPAC	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify geographic coordinates table: Allow	System - System Admin
	System: Access	System - System Admin
Acquisitions Administration Permissions		
Maintain acquisitions settings	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify links to supplier databases: Allow	System - System Admin
	Modify donation fund category table: Allow	System - System Admin
	Modify currencies table: Allow	System - System Admin
	System: Access	System - System Admin

Workflow	*Required Permissions*	*Administration Explorer Security Location*
Serials Administration Permissions		
Set parameters and profiles related to Serials	Access administration: Allow Modify parameters: Allow Modify profiles: Allow System: Access	System - System Admin System - System Admin System - System Admin System - System Admin
WebAdmin Permissions		
Use Polaris Language Editor (Web Admin) to customize language strings for Polaris products	WebAdmin access: Allow	System - System Admin

Setting Up Server Records

After the network servers are established on the network and Polaris software has been installed, you register the following network servers in Polaris Administration:

- Polaris Application server/SQL Server (catalog database)
- Search server (Polaris search engine)
- Web Server (Polaris PowerPAC applications, report server, Language Editor)
- Telephone (outbound and inbound telephony)

You also register remote resources as search targets for staff and patrons by registering the target servers in Polaris. The process is similar to registering your own servers. The remote resources can be searched and results displayed using the same tools and user interface as for the local catalog.

Note:
Polaris Library Systems sets up and registers your servers at installation and implementation. However, you can use the procedures in this unit if your server configuration changes, or if you add remote search targets.

See the following topics:

- "Registering Polaris Servers" on page 152
- "Setting Web Server Parameters" on page 161
- "Registering Remote Resource Servers" on page 166
- "Polaris PowerPAC & MuseGlobal Federated Search" on page 171
- "Controlling Database Access in the Staff Client" on page 178
- "Offering the Polaris Database as a Remote Target" on page 180

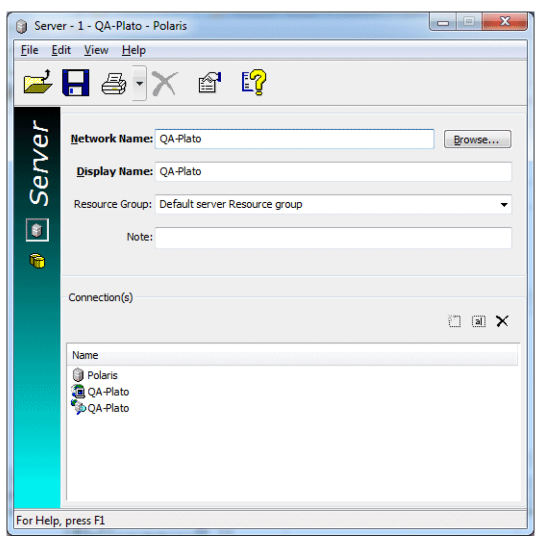
Registering Polaris Servers

Polaris server software applications may reside on one or more physical computers. For example, the Polaris application server/SQL server and Z39.50 server applications may be on one computer, with the Web server on a separate computer. Each physical computer is registered in a Polaris server record. You then define the appropriate connections in the server record, depending on the server configuration. For example, if three Polaris server applications reside on one computer, the server record for the computer defines three connections: **SQL Server**, **Web Server**, and **Search Server**. If there is a separate Web server computer, the server record for that computer includes only the **Web Server** connection. If you use Polaris telephony, you may have one separate telephony server, or multiple servers for a large consortium. The server record also defines the databases accessible to the server.

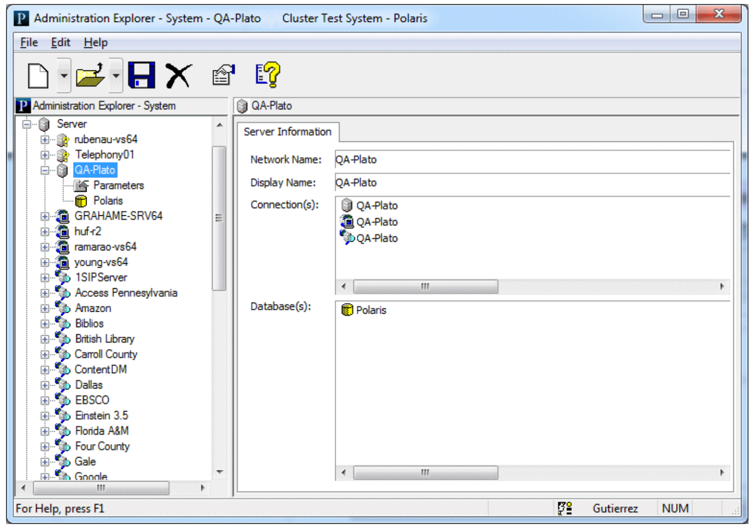
Server records are displayed in the Server workform. Icons in the Connections list indicate server connection types as follows:

- **SQL server** -
- **Web server** -
- **Search server** -
- **Telephony server** -

The illustration shows a server workform for a system where three Polaris server applications (SQL server, Web server, Search server) reside on a single physical computer.



After a server record is saved, it is listed under the Server folder in the Administration Explorer tree view.



Note:
In the Administration Explorer tree view, a question mark beside a server name indicates that the server is not fully configured. That is, the record has been set up but connections or databases have not been added to the record.

You can open the server workform from the Explorer or the Polaris Find Tool. You can add, change, and delete connection and database entries in the server record.

Note:
The **Servers: Access** and **Servers: Modify** permissions are required to change the server record.

See the following topics:

- "Register a Polaris server in Polaris" on page 154
- "Define an SQL server connection" on page 155
- "Define a Web server connection" on page 157
- "Define a telephony server connection" on page 157
- "Define a Polaris search server connection" on page 158
- "Specify Polaris server databases" on page 160

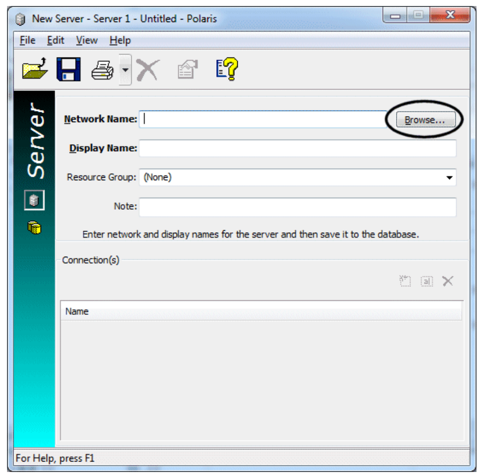
Register a Polaris server in Polaris

To do this procedure, Polaris server software must already be installed on the server computer, and the server must be available on the network. Follow these steps to register a new Polaris server.

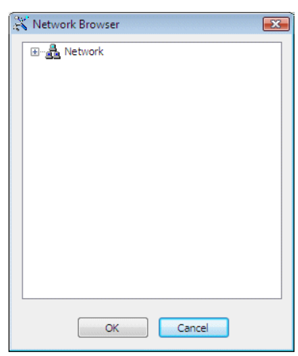
Note:
To set up a server record for a remote search target, see "Set up a server record for a Z39.50 or other search server" on page 167.

1. Select **Administration**, **Explorer**, **System** on the Polaris Shortcut Bar.
2. Select **File, New, Server** on the Administration Explorer menu bar.

   The Server workform appears.
3. Click **Browse** to select the server on the network.



   The Network Browser dialog box appears.



4. Expand the network tree until it displays the server computer name.
5. Select the server computer, and click **OK**.

   The system name for the server computer is displayed in the **Network Name** box.
6. In the **Display Name** box, type the name that you want to display in the Polaris user interface for this server.

Note:
Leave the Resource Group option set to **None**. If you select a resource group, only those organizations associated with that resource group will be able to access the Polaris server. For more information about resource groups, see "Setting Up Organization Resource Groups" on page 56.

7. Select **File, Save** to record this server.

   The new server is added to Polaris and assigned a server identification number.

8. Define any of the following connection types for the servers installed on this computer:
   - **SQL Server** - See "Define an SQL server connection" on page 155
   - **Web Server** - See "Define a Web server connection" on page 157
   - **Telephony Server** - See "Define a telephony server connection" on page 157
   - **Search Server** - See "Define a Polaris search server connection" on page 158

9. Define the Polaris databases available on the server with the Databases view. See "Specify Polaris server databases" on page 160.

10. Select **File, Save** to save the server record.

Related Information

- **Modify a database or connection entry** - Select the entry and click . You can change database names, connection names, and the data link properties for connections. You cannot change existing connection types. See "Change a table entry" on page 30.

- **Delete a database or connection entry** - Select the entry and click . Removing an entry removes the database from the search tools. See "Delete a table entry" on page 32. You cannot delete the Polaris database server.

Define an SQL server connection

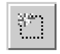
If a registered Polaris server includes the Polaris application/SQL server application, follow these steps to add the SQL server connection to the server record.

Note:
You cannot delete the SQL Server connection from the Polaris database server.

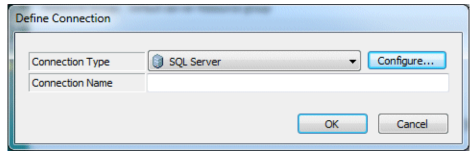
1. Expand **Server** in the Administration Explorer tree view.
2. Right-click the server name, and select **Edit** from the context menu.

   The Server workform opens.

3. Click  to display the Connections view.

4. Click  to display the Define Connection dialog box.

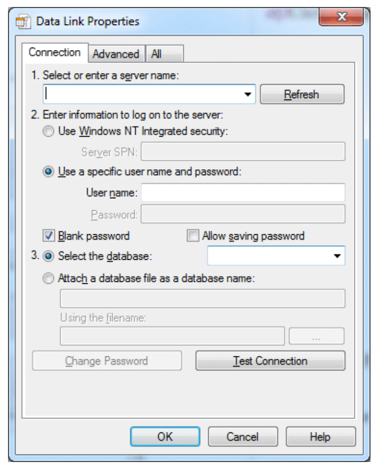
5. Select **SQL Server** in the **Connection Type** box.



6. Type a name that describes this connection in the **Connection Name** box.

7. Set the data link properties by doing the following actions:

a) Click **Configure** to display the Data Link Properties dialog box.



b) Select the Polaris SQL server name in the **Select or enter a server name** box.

c) Specify the server log-on information in the **User name** and **Password** boxes.

d) Choose **Select a database on the server**, and select **Polaris** in the box.

e) Click **OK** on the Data Link Properties dialog box.

The Data Link Properties dialog box closes, and the Define Connection dialog box appears.

8. Click **OK**.

The Define Connection dialog box closes, and the new connection entry appears in the **Connection** list on the Server workform.

9. Select **File, Save**.

Define a Web server connection

If a registered Polaris server includes the Web server application, follow these steps to add the Web server connection to the server record.

1. Expand **Server** in the Administration Explorer tree view.
2. Right-click the server name, and select **Edit** from the context menu.

   The Server workform opens.

3. Click  to display the Connections view.
4. Click  to display the Define Connection dialog box.
5. Select **WWW Server** in the **Connection Type** box.
6. Type a name that describes this connection in the **Connection Name** box.
7. Click **Configure** to select the Web server computer on the network.

   The Network Browser dialog box appears.

8. Select the server from the Network Browser, and click **OK**.

   The Network Browser dialog box closes, and the Define Connection dialog box appears.

9. Click **OK**.

   The Define Connection dialog box closes, and the new connection entry appears in the Connection list on the Server workform.

10. Set up Web server parameters for the server. See "Review and change Web server parameters" on page 162.

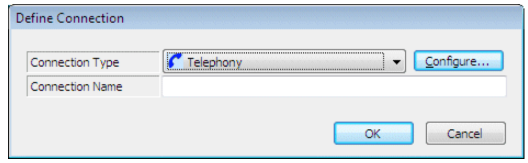
Define a telephony server connection

If a registered Polaris server includes the telephony server application (inbound and outbound telephony), follow these steps to add the telephony server connection to the server record.

1. Expand **Server** in the Administration Explorer tree view.
2. Right-click the server name, and select **Edit** from the context menu.

   The Server workform opens.

3. Click  to display the Connections view.
4. Click  to display the Define Connection dialog box.
5. Select **Telephony** in the **Connection Type** box.



6. Type a name that describes this connection in the **Connection Name** box.
7. Click **Configure** to select the telephony server computer on the network.

   The Network Browser dialog box appears.
8. Select the server from the Network Browser, and click **OK**.

   The Network Browser dialog box closes, and the Define Connection dialog box appears.
9. Click **OK**.

   The Define Connection dialog box closes, and the new connection entry appears in the Connection list on the Server workform.
10. Select **File**, **Save**.
11. Set up telephony parameters for the server. See "Setting Outbound Telephony Parameters" in the *Polaris Telephony Administration Guide 4.1* and "Setting Up Inbound Telephony" in the *Polaris Telephony Administration Guide 4.1*.

    Note:
    If your system includes multiple telephony servers, set up the server record, telephony connection, and parameters for each telephony server.

Define a Polaris search server connection

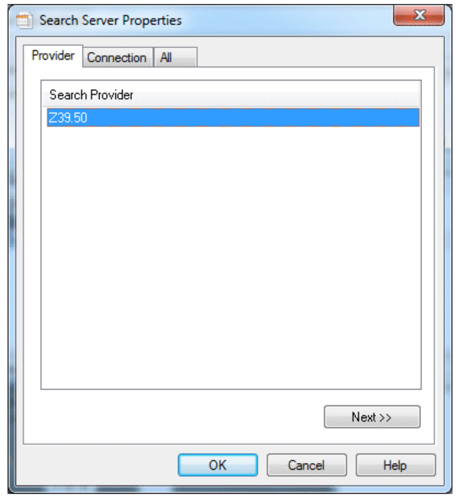
If a registered Polaris server includes the Polaris search server application, follow these steps to add the search server connection to the server record.

Note:
For information about setting up records for remote search servers, see "Registering Remote Resource Servers" on page 166.

1. Expand **Server** in the Administration Explorer tree view.
2. Right-click the server name, and select **Edit** from the context menu.

   The Server workform opens.
3. Click [icon] to display the Connections view.
4. Click [icon] to display the Define Connection dialog box.
5. Select **Search Server** in the **Connection Type** box.
6. Type the search server name in the **Connection Name** box.
7. Set the server properties by doing the following actions:

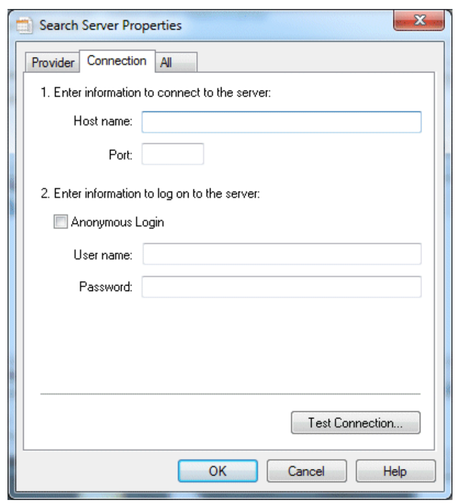
   a) Click **Configure** to display the Search Server Properties dialog box, Provider tabbed page.



b) Select **Z39.50** and click **Next**.

c) On the Connection tabbed page, enter the following information for your Polaris search server:

- Host name
- Port
- User name
- Password



d) Click **OK** on the Search Server Properties dialog box.

The Search Server Properties dialog box closes and the Define Connection dialog box appears.

8. Click **OK** on the Define Connection dialog box.

The Define Connection dialog box closes, and the new connection entry appears in the Connection list on the Server workform.

9. Select **File, Save**.

Specify Polaris server databases

Follow these steps to add a Polaris catalog database to a server record.

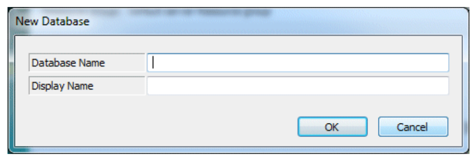
Note:
Refer to "Set up a server record for a Z39.50 or other search server" on page 167 to set up a connection to a non-Polaris database.

1. Expand **Server** in the Administration Explorer tree view.
2. Right-click the server name in the Explorer tree view, and select **Edit** from the context menu.

   The Server workform opens.

Tip:
Click to display the Databases view.

3. Select **View, Databases** to display the Databases view.
4. Click to display the New Databases dialog box.



5. Type the ODBC name of the database in the **Database Name** box.
6. Type a display name for the database in the **Display Name** box.
7. Click **OK** on the dialog box.

   The New Database dialog box closes, and the new database entry appears in the Databases list on the Server workform.

8. Select **File, Save**.

Related Information

Make a database available in the staff client - See "Controlling Database Access in the Staff Client" on page 178.

Setting Web Server Parameters

The Polaris Web server typically hosts Polaris PowerPAC and Polaris Language Editor (WebAdmin), stores settings for the Polaris Phone Attendant (inbound telephony), and may also include the report server and/or Polaris Mobile PAC. After you register a Polaris server with a Web server connection, you set parameters that indicate where the components are located for the Web interface to Polaris PowerPAC or Mobile PAC. Microsoft Internet Information Services (IIS) software must be installed on the Web server and configured before you set Web server parameters in Polaris Administration.

See the following topics:

- "Secure Socket Layer (SSL)" on page 161
- "Search Protocols" on page 172
- "Search Targets and Search Results" on page 172
- "MuseGlobal Applications" on page 173
- "Setting Up the MuseGlobal Service" on page 173
- "Setting Up MuseGlobal & Federated Search in Polaris" on page 175
- "Import databases to the MuseGlobal search server" on page 176

Secure Socket Layer (SSL)

You can encrypt the personal data of your patrons (use https:) when they use Polaris PowerPAC or Mobile PAC. The encryption protects their logon and library account information when they log on to use the Ask Us feature, request holds, renew items, or review their accounts. Polaris PowerPAC and Mobile PAC work without using SSL protocols, but personal data sent over the Internet is exposed to potential interception. To enable data encryption for patron account information in Polaris PowerPAC, set the **SSL: Enable: PowerPAC** parameter for the Web server to **Yes**. Patrons must have SSL protocol enabled for their Web browser and must accept the Microsoft certificate the first time they log on from outside the library. Data encryption is automatically used when a patron logs on. Catalog searches and functions that do not require log-on can use encryption, but connection performance may be slower. To enable data encryption for Mobile PAC, set the **SSL: Enable: Mobile PAC** parameter for the Web server to **Yes**. This parameter sets the entire Mobile PAC site (not just patron account information) to https. You can also secure the entire PowerPAC site. See "Set the entire PowerPAC site to https only" on page 164.

For e-commerce, Secure Socket Layer (SSL) provides a secure environment for Web-based credit card transactions that follows industry standards. All communications use https:// by an SSL connection. Payments from PAC cannot be made unless you have installed an SSL server certificate and an SSL connection has been established. A binding is made between port 443 and the PowerPAC Web site certificate, and SSL encrypts the data transferred from the patron's Web browser to the library's PowerPAC Web site (IIS) server.

To enable SSL in IIS, you must first obtain a certificate that is used to encrypt and decrypt the information that is transferred over the network. The certificate must support 128-bit encryption.

Important:
For more information about SSL requirements for e-commerce PCI compliance, see the *Polaris E-Commerce Data Security Standard Implementation Guide*, available on the Customer Extranet.

IIS includes its own certificate request tool that you can use to send a certificate request to a certification authority. This tool simplifies the process of obtaining a certificate. For instructions on enabling SSL in IIS, go to:

http://technet.microsoft.com/en-us/library/bb727098.aspx

Important:
If you plan to accept credit card payments and donations from PAC, you must install the appropriate certificates and enable SSL. For more information about setting up credit card processing with Polaris, See "Setting Up E-Commerce" in the *Polaris Patron Services Administration Guide 4.1R2*.

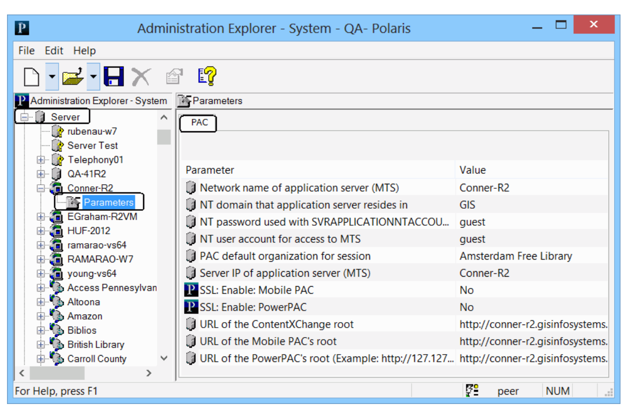
1-2-3

Review and change Web server parameters

Follow these steps to set parameters for the Polaris Web server.

1. In the Administration Explorer tree view, open the **Server** folder and expand the server for which you want to set Web parameters.
2. Select **Parameters** under the server.

   The PAC parameters tabbed page is displayed in the details view.



3. Specify the location of the Polaris Application server by setting each of the following parameters:
   - **Network name of Application Server (MTS)** - Name of the computer on which the Polaris Application Server software is installed. The server name cannot contain any spaces.
   - **NT Domain that Application Server resides in** - Microsoft Windows NT domain where the Polaris Application server is located. The domain name cannot contain any spaces.
   - **Server IP of Application Server (MTS)** - Internet protocol address of the Polaris Application server.
4. Specify the network account used by the PAC software to access Polaris by setting each of the following parameters:
   - **NT Password used with SVRAPPLICATIONNTACCOUNT** - Password used by the public access computers to access Polaris.
   - **NT User account for access to MTS** - User name used by the public access computers to access Polaris.
   - **PAC Default Organization for session** - Organization to which all public access computers connect if an organization is not otherwise specified.
5. To encrypt patron log-on data (use https:) for Polaris PowerPAC, double-click **SSL: Enable: PowerPAC**, and select **Yes**. See "Secure Socket Layer (SSL)" on page 161.

   Notes:
   If you are using SSL, the value for the Server parameter **URL of the PowerPAC's root** should be entered in lower case.

   You can also use https for the entire PowerPAC site. See "Set the entire PowerPAC site to https only" on page 164.
6. To encrypt the Mobile PAC site, double-click **SSL: Enable: Mobile PAC**, and select **Yes**. See "Secure Socket Layer (SSL)" on page 161.

   Note:
   Some older mobile phones do not support SSL.
7. If your system includes Polaris ContentXChange, double-click **URL of the ContentXChange root** and specify the URL of the server where ContentXChange is installed:
   http://<servername>/ContentXChange/

   The location is typically your PAC server, and if so, you can simply copy the servername portion of the URL from the parameter **URL of the PowerPAC's root**.

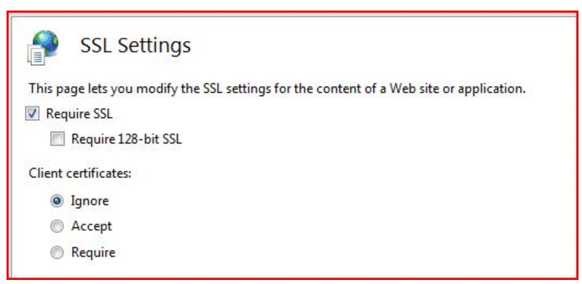
   Note:
   ContentXChange, a separately licensed feature for libraries that use Polaris Community Profiles, is an optional Web component of Polaris server software and must be selected when Polaris Web server software is installed.
8. Select **File, Save**.

Set the entire PowerPAC site to https only

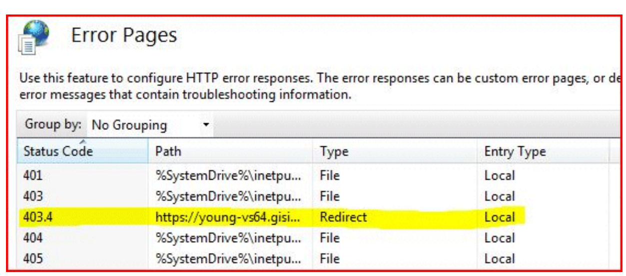
You can use SSL to secure the entire PowerPAC site, not just patron information (see “Secure Socket Layer (SSL)” on page 161). However, if you use content from third-party vendors, be aware that your patrons may receive messages about allowing unsecured content. If you think the messages will be a problem, contact your vendors to see if they can use https. (If so, you will need to change their Enriched Data URL settings from http to https. See “Enabling Enriched Data” in the *Polaris Public Access Administration Guide 4.1R2*.) Follow these steps to set up the entire PowerPAC site to use https.

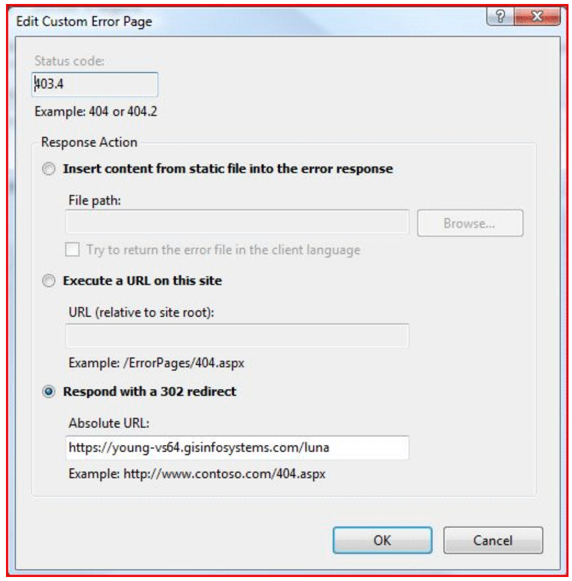
Note:
If you have set a patron inactivity timeout for PAC workstations in the library, and SSL is enabled for the entire site, the 60-second countdown timer appears in the status bar only if you add the site to the trusted sites list in Internet Explorer. For more information about the inactivity timeout, see “Patron Inactivity Timeout at In-House Workstations” in the *Polaris Public Access Administration Guide 4.1R2*.

1. Install an SSL Certificate on the Web server.
2. In Polaris Administration, set the Web server PAC parameter **SSL: Enable** to **Yes.**
3. In Polaris Administration, change the Web server PAC parameter **URL of the PowerPAC’s root** to begin with **https** instead of **http**.
4. Using the IIS Manager on the Web server, change the SSL Settings at the root of the Polaris Web application to **Require SSL**.

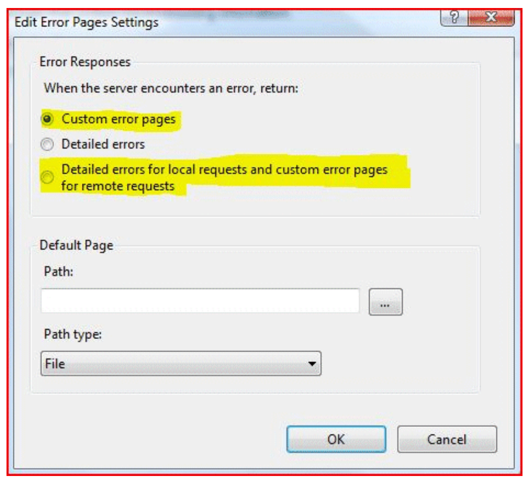


5. Using the IIS Manager, set up a custom error page for a status code of 403.4 that will redirect the browser to the secure version of the PAC.





6. Using the IIS Manager, edit the Feature Settings to use either **Custom error pages** or **Detailed errors for local requests and custom error pages for remote requests.**



Registering Remote Resource Servers

To provide remote resources as search targets, you set up server records for the remote resources. Polaris uses the Z39.50 version 3 protocol to access remote target databases. Using the Polaris Find Tool, you can search for and retrieve MARC 21 records and holdings information from these Z39.50 target sites. You can also make Z39.50 target databases available for searching in the PAC. To enable the connection to a remote Z39.50 target, you set up a server record for the target in Polaris Administration and add a Z39.50 connection entry to the record. The organization that owns the remote database provides the IP address and logon information.

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.

Remote resources may include Z39.50 servers, as well as MuseGlobal or other search servers. For more information, see “Polaris PowerPAC & MuseGlobal Federated Search” on page 171.

Note:
Polaris ZMARC provides access to over 11 million bibliographic records, over seven million name authority records, and close to three million subject authority records cataloged by the Library of Congress, as well as over 250,000 AV records provided by Baker & Taylor. If your library subscribes to Polaris ZMARC databases, Polaris Customer Support sets up the remote search targets for the ZMARC databases. For more information about Polaris ZMARC, contact your Site Manager.

See the following topics:

- “Set up a server record for a Z39.50 or other search server” on page 167
- “Bib-1 Use Attributes in Polaris Searches” on page 182

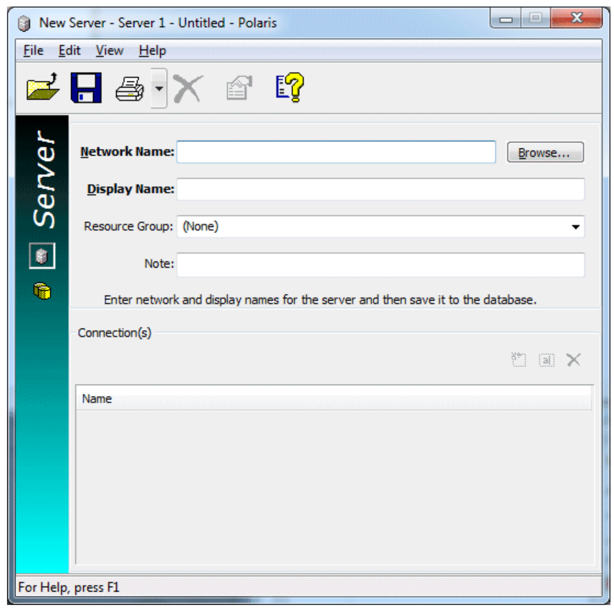
Set up a server record for a Z39.50 or other search server

Obtain the IP address and logon information for the remote target server. Then follow these steps to set up a new server record for a remote search target, and specify the resource group that can use the target. See “Setting Up Organization Resource Groups” on page 56.

Important:
If more than one resource group should be able to use the target, set up a separate server record for each group.

1. Select **Administration**, **Explorer**, **System** on the Polaris Shortcut Bar.
2. Select **File, New, Server** on the Administration Explorer menu bar.

   The New Server workform opens.



3. Specify a network name for this database.

   The network name can be the same as the display name (see step 4).

   Important:
   The network name for a remote Z39.50 server cannot contain the single quote character (apostrophe), which causes connection problems in PAC searches. For example, use **Bowkers Books in Print** instead of **Bowker’s Books in Print**.

   Note:
   The **Browse** button is used to locate servers on your own network. It does not apply to a server record for a remote resource.

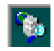
4. In the **Display Name** box, type the name that you want to display in the Polaris user interface for this server.
5. Select **File, Save**.
6. From the **Resource Group** list, select the resource group that should have access to this database or resource.

Note:
Select **None** if you want every organization to have access (no resource group restriction).

7. (Optional) Type a non-public note (255 characters maximum) describing this database or resource.

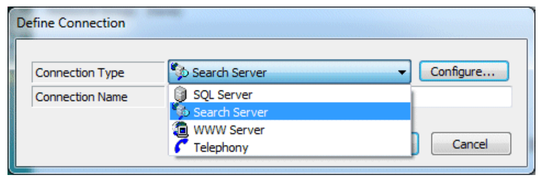
8. Save the record.

9. Define the connection type for this server record:

  a) Click  to display the Connections view if it is not already displayed.

  b) Click  to display the Define Connection dialog box.

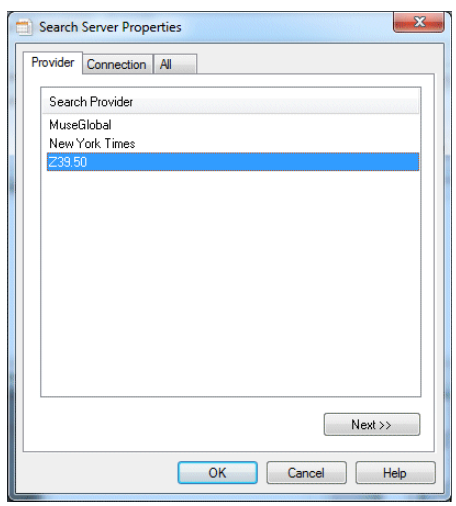
  c) Select **Search Server** in the **Connection Type** box.



  d) Type the connection name in the **Connection Name** box.

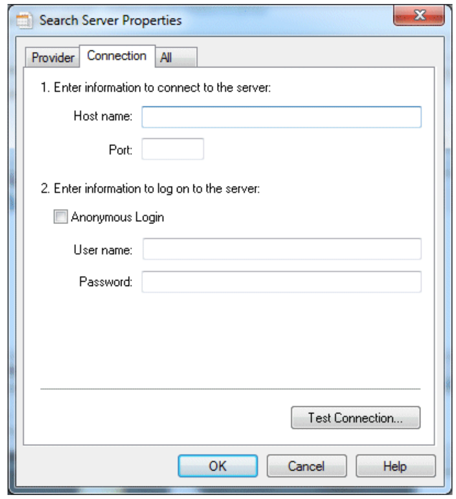
  e) Click **Configure** to display the Search Server Properties dialog box.

  f) On the Provider tabbed page, select **Z39.50** or the search server provider, and click **Next** to go to the Connection tabbed page.



  g) On the Connection tabbed page, enter the following information:
    - Host name
    - Port
    - User name
    - Password

Note:
For Z39.50 targets that do not require log-in, select **Anonymous Login** instead of supplying your library's user name and password for the resource.



10. Click **Test Connection**. A message indicates if the connection was successful.

    Note:
    To review all settings, select the All tab.

11. Click **OK** to save your settings and close the Search Server Properties dialog box.

    The Server workform displays the connection.

    Important:
    When a new database is added, both in-house and remote access are disabled by default. To set access to the database, see "Remote Database Usage Settings for PowerPAC" in the *Polaris Public Access Administration Guide 4.1R2*.

Related Information

- **Make the remote target available for searching in the PAC** - New search server targets are not automatically added to the PAC display. You must explicitly make them available for search selection. See "Managing Federated Search Targets" in the *Polaris Public Access Administration Guide 4.1R2*. To allow interlibrary loan requests from PAC, see "Setting Up ILL Requests" in the *Polaris Patron Services Administration Guide 4.1R2*.
- **Remove the resource group from the server record** - From the **Resource Group** list, select **None**, or select a different group. This change prevents organizations associated with the original resource group from accessing the resource.

- **Resource group changes** - When a new resource group is selected on the server workform and you save the server record, the Report of Unavailable Targets dialog box appears. The dialog box lists the database display name defined for PAC (the organization-level name or system-level name, if none is defined for the organization), the server display name, and the databases affected. If you continue to save the record, the database is removed from PAC display (if it has been selected for display) for every organization indicated in the report where there is no inheritance. The database may still be available for a parent organization. For more information about setting up the target display for PAC, see “Organizing Target Databases for PowerPAC Display” in the *Polaris Public Access Administration Guide 4.1R2*.
- **Set usage conditions for a resource** - See “Remote Database Usage Settings for PowerPAC” in the *Polaris Public Access Administration Guide 4.1R2*.
- **Make the remote target available for searching in the staff client** - See “Controlling Database Access in the Staff Client” on page 178.
- **Remote databases accessible to a specific branch** - The Branch property sheet shows the number of accessible remote databases available to the branch in the staff client and in PAC. To open the property sheet, right-click the branch name in the Administration Explorer and select **Properties**, or click the Properties icon  on the Branch workform.

Polaris PowerPAC & MuseGlobal Federated Search

Polaris PowerPAC provides federated searching, which enables users to simultaneously search multiple diverse and distributed target resources and retrieve merged search results. Polaris provides federated searching of Z39.50 databases at no additional cost. Or, libraries can purchase a license for the MuseGlobal service, which provides access to external databases that use many different kinds of search protocols (Z39.50 and many others). While MuseGlobal provides search access, connectors and URLs that conform to OpenURL, all searching is conducted using the PowerPAC search interface.

Note:
Although staff members can search multiple databases in the Polaris staff client, the results are not merged. If a link resolver is required, the library must purchase it from a third-party.

The MuseGlobal service is hosted on the MuseGlobal servers, and Polaris communicates with the service via the MuseGlobal API. Polaris stores the technical information necessary to make the connection between MuseGlobal and Polaris; MuseGlobal manages the connectors to the individual databases.

See the following topics:

- "Search Protocols" on page 172
- "Search Targets and Search Results" on page 172
- "MuseGlobal Applications" on page 173
- "Setting Up MuseGlobal & Federated Search in Polaris" on page 175
- "Import databases to the MuseGlobal search server" on page 176

Search Protocols

Federated searching in Polaris, combined with the MuseGlobal service, can use the following types of search protocols:

Tip:
Since the Polaris PowerPAC can search remote Z39.50 database targets without MuseGlobal, your library may decide to use MuseGlobal only when the source cannot be searched using Z39.50.

- Z39.50 (v1, v2, v3) - Search hosts that support all three versions of the Z39.50 protocol.
- HTTP - Search the major web search engines.
- Free text searches - Use common free text search engines through their native API (Application Program Interface).
- SQL or ODBC databases (with known characteristics) - Search databases using these two protocols where enough is known about the database to correctly structure the search statement.
- Proprietary protocol - These sources (library catalogs, publishers databases, etc.) have a rich store of information, but do not have standard search interfaces. This requires a specific protocol translator for each piece of software.
- XML gateway (SOAP, REST)
- SQL
- SRU / SRW

Search Targets and Search Results

With federated searching in Polaris using the MuseGlobal service, the following types of targets can typically be searched (providing the MuseGlobal service has established a connector for the database):

- Library catalogs (MARC)
- Supplementary and locally-created non-MARC databases such as archives records, community resources, newspaper indexes, and metadata imports from vendors such as EBSCO
- Non-MARC sources that are internal to the library
- Commercial full text research databases (API support)
- Electronic journals
- Abstract/indexing databases
- News feeds
- Websites
- Subscription databases
- Digital content including images (photos, maps), multimedia, full-text, and metadata
- Consortia member websites
- Unstructured data, such as: theses, white papers, and reports

When search results are returned from the remote federated databases, duplicate detection is not performed. The results are sorted by relevancy, and PowerPAC users can select facets to narrow the search.

MuseGlobal Applications

A MuseGlobal application is a named group of databases to which a library or group of libraries has purchased access. (The access rights are purchased from the database provider, not from MuseGlobal.) In Polaris, the MuseGlobal application is defined as a server record with one or more associated databases. Libraries work with Polaris staff members to configure the optimal arrangement of MuseGlobal applications and Polaris server records.

Setting Up the MuseGlobal Service

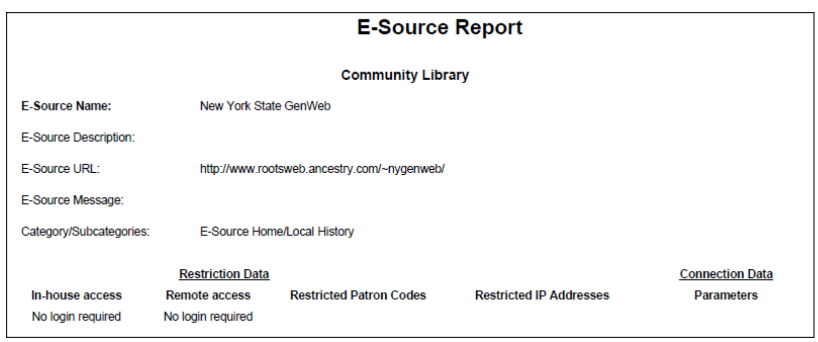
Setting up the MuseGlobal service involves the following general steps:

Tip:
Databases that use the Z39.50 search protocol do not require the MuseGlobal service; Polaris federates searches of Z39.50 targets without the MuseGlobal service.

1. The library lists their search targets, based on their current subscriptions and agreements with database providers. The library generates the E-Sources report that lists the subscription databases set up for searching from the PAC e-sources page. The report is available by selecting **Utilities, Reports and Notices, PAC**. It can be generated for a specific branch or all branches.

   For each e-source, the following information is included on the report:

   - Database name and description
   - Connection URL
   - Message
   - Categories/subcategories
   - Restriction data
   - Connection data.



E-Source Report

Community Library

E-Source Name: New York State GenWeb

E-Source Description:

E-Source URL: http://www.rootsweb.ancestry.com/~nygenweb/

E-Source Message:

Category/Subcategories: E-Source Home/Local History

	Restriction Data			Connection Data
In-house access	Remote access	Restricted Patron Codes	Restricted IP Addresses	Parameters
No login required	No login required			

2. The library determines which search targets are appropriate for federated search. Certain databases to which the library currently subscribes may be so specific that federating them does not make sense. For example, if the library subscribes to Chilton's Automotive Database, a patron searching this database would most likely not want results merged with other databases. These databases can remain as e-sources that are searched separately.

3. The library records the following information for each target database to include in federated searching:
   - Source database name
   - Source database provider (vendor)
   - Source database target URL
   - Restrictions (contract or technical limit)
   - Login username & password, if required for authentication
4. The Polaris representative accesses the MuseGlobal administration console and creates the MuseGlobal account:
   - If the connector to the database already exists, the Polaris representative adds the connectors.
   - If the connector does not already exist, the Polaris representative asks MuseGlobal for a quote to add the connector.

     Note:
     For EBSCO or Gale databases, additional information is necessary. EBSCO requires an EBSCO EIT account, and Gale requires a Gale group or library username (sometimes called the Location ID). The Polaris representative or library staff member contacts the vendor to request this information.
   - Once the Polaris representative has created the MuseGlobal account, the library is given a new IP address that must be reported to each database provider that accepts IP recognition.

     Note:
     This IP address is added to the library's current list of authenticated IP addresses.
5. Before setting up the MuseGlobal search servers (applications) in Polaris, the library should consider the following:
   - Are some databases available only to patrons of certain branches?
   - Are there separate groups or types of patrons that may need special access to a set of otherwise restricted databases?
   - Will patrons using in-house library computers need to authenticate through the PAC to access federated searching?
   - Will patrons using a remote computer need to authenticate through the PAC to access federated searching?
   - What topical categories would the library like to present on the database selection list?

     Note:
     The library can use the E-Sources report to see the current categories and subcategories, but the library may want to change these.

Setting Up MuseGlobal & Federated Search in Polaris

After the Polaris Library Systems representative configures the service via the MuseGlobal console, the representative helps the library set up federated search with MuseGlobal in Polaris Administration following this workflow:

- ☐ **Define Resource Groups** - If you have databases that are restricted to patrons of certain branches, set up resource groups for the branches whose registered patrons will have access to the remote databases, and grant resource group permissions to the appropriate staff members. After the resource groups are defined, the resource group list is displayed in the Server workform. The library selects a resource group that has access to the server database(s). See "Setting Up Organization Resource Groups" on page 56.
- ☐ **Set up the MuseGlobal search server** - Each server represents a MuseGlobal application, which is a named group of databases to which a library or group of libraries has purchased access. (The access rights are purchased from the database provider, not from MuseGlobal.) Libraries, especially those in consortial arrangements, may have more than one MuseGlobal application. In Polaris Administration, the MuseGlobal application is defined as a system-level server record with one or more associated databases. The configuration information for the individual databases is imported from MuseGlobal and applied to Polaris. A single MuseGlobal application can be shared among libraries that are on different service contracts with the database providers. Libraries work with Polaris staff members to configure the optimal arrangement of MuseGlobal applications and Polaris server records. Select the resource groups that will have access to the database(s), and enter the information to connect to the MuseGlobal application. See "Registering Remote Resource Servers" on page 166.
- ☐ **Import databases to the MuseGlobal server** - After the search server connection is set up, import the databases to the search server. See "Import databases to the MuseGlobal search server" on page 176.
- ☐ **Define the search database selection limit at the system level** - Use system-level PowerPAC profile, **Remote databases: Maximum number that can be searched at once** to specify the number of databases. This should be set to a default of 10, with a maximum of 25 databases that library users can select at a time. When you set up categories using MuseGlobal databases, each category should not exceed 25 databases because of this limit. See "Maximum Number of Databases Searchable at One Time" in the *Polaris Public Access Administration Guide 4.1R2*.
- ☐ **Categorize the remote databases -** Organize the remote databases available to the organization into categories. See "Organizing Target Databases for PowerPAC Display" on page 97.

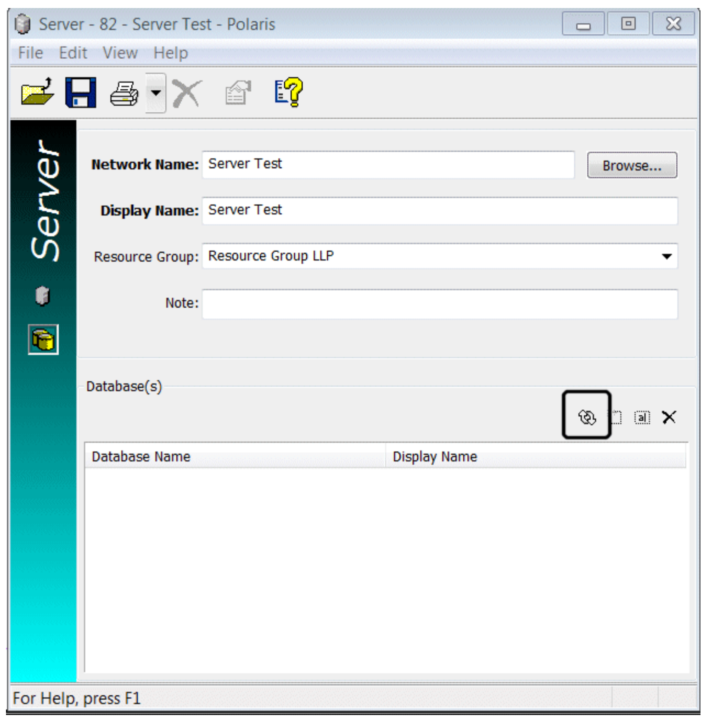
- ☐ **Configure the remote databases** - After the databases are imported into the MuseGlobal search server, use the **Remote databases: Usage settings** PowerPAC profile to: specify whether the remote database is a follow-on search database; the maximum search time and number of records to return; the authentication requirements for in-house and remote access; restrict access by patron code or IP address; and the search access points available while searching the database. See "Remote Database Usage Settings for PowerPAC" on page 102.

Import databases to the MuseGlobal search server

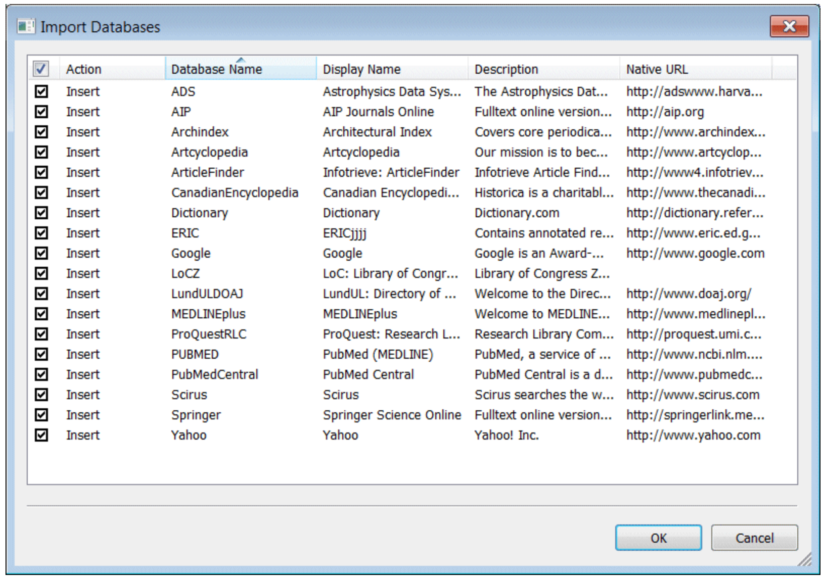
Note:
The import function is available only for setting up MuseGlobal search servers.

Follow these steps to import databases to the MuseGlobal search server.

1. Set up the MuseGlobal search server. See "Registering Remote Resource Servers" on page 166.
2. On the Server workform, click  to go to the Databases view.



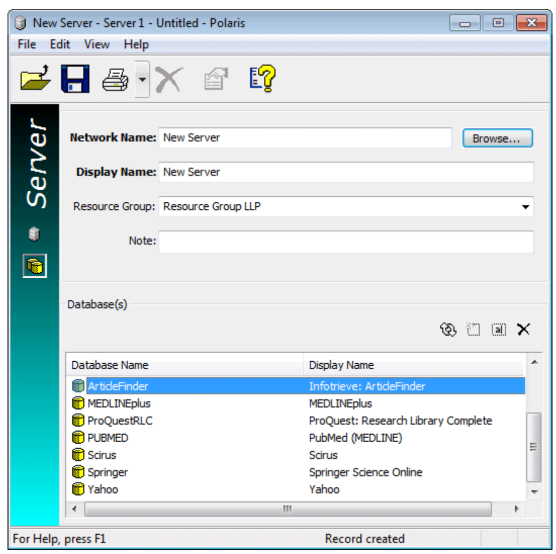
3. Click the import button  to open the Import Databases window.



Action	Database Name	Display Name	Description	Native URL
Insert	ADS	Astrophysics Data Sys...	The Astrophysics Dat...	http://adswww.harva...
Insert	AIP	AIP Journals Online	Fulltext online version...	http://aip.org
Insert	Archindex	Architectural Index	Covers core periodica...	http://www.archindex...
Insert	Artcyclopedia	Artcyclopedia	Our mission is to bec...	http://www.artcyclop...
Insert	ArticleFinder	Infotrieve: ArticleFinder	Infotrieve Article Find...	http://www4.infotriev...
Insert	CanadianEncyclopedia	Canadian Encyclopedi...	Historica is a charitabl...	http://www.thecanadi...
Insert	Dictionary	Dictionary	Dictionary.com	http://dictionary.refer...
Insert	ERIC	ERICjjjj	Contains annotated re...	http://www.eric.ed.g...
Insert	Google	Google	Google is an Award-...	http://www.google.com
Insert	LoCZ	LoC: Library of Congr...	Library of Congress Z...	
Insert	LundULDOAJ	LundUL: Directory of ...	Welcome to the Direc...	http://www.doaj.org/
Insert	MEDLINEplus	MEDLINEplus	Welcome to MEDLINE...	http://www.medlinepl...
Insert	ProQuestRLC	ProQuest: Research L...	Research Library Com...	http://proquest.umi.c...
Insert	PUBMED	PubMed (MEDLINE)	PubMed, a service of ...	http://www.ncbi.nlm....
Insert	PubMedCentral	PubMed Central	PubMed Central is a d...	http://www.pubmedc...
Insert	Scirus	Scirus	Scirus searches the w...	http://www.scirus.com
Insert	Springer	Springer Science Online	Fulltext online version...	http://springerlink.me...
Insert	Yahoo	Yahoo	Yahoo! Inc.	http://www.yahoo.com

4. Select the **Insert** check box next to the databases you want to import to the MuseGlobal search server, and click **OK**.

   The selected databases are listed in the Server workform.



5. Select **File, Save** to save the search server settings.

   Important:
   When remote databases are added, the default setting is Unavailable. You enable the remote databases and make other settings when you configure the remote databases. See "Remote Database Usage Settings for PowerPAC" in the *Polaris Public Access Administration Guide 4.1R2*

Controlling Database Access in the Staff Client

After you have registered a Polaris catalog or remote server, and you have defined connections and databases for the server, you specify at the system level which branches have the option to use the databases in the staff client.

Note:
Registered databases are available as potential search targets in PAC. To display these databases for PAC searching, see "Managing Federated Search Targets" in the *Polaris Public Access Administration Guide 4.1R2*.

See the following topic:

- "Set database availability in the staff client" on page 178

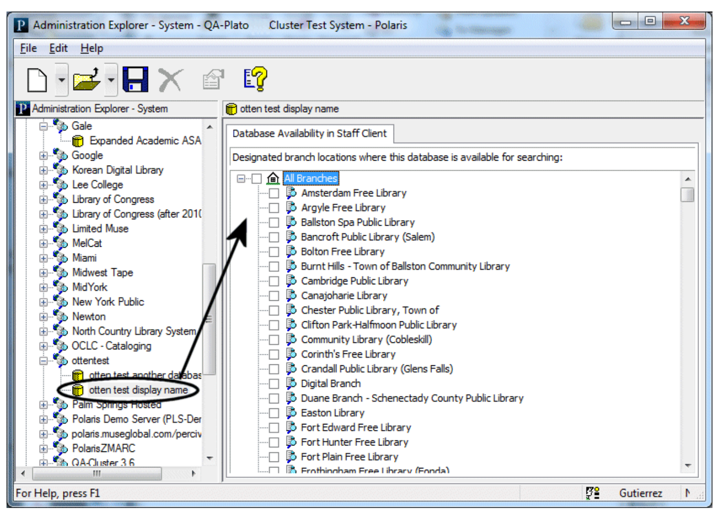
Set database availability in the staff client

Follow these steps to define which databases are available to a particular organization in the staff client.

Tip:
The icon signifies a database.

1. Expand the **Server** folder in the Administration Explorer tree view, and expand the server folder with the database you want to control.
2. Select the database.

   The Database Availability for Staff Client table appears in the details view.



Tip:
You can set the **All Branches** check box based on how the majority of the branches should be set. Then, you can change the setting for the few branches that are different from the majority.

3. Do one of the following:
   - To make the database available to all branches, select the **All Branches** check box.
   - To make the database unavailable for all branches, clear the **All Branches** check box. If the **All Branches** check box is shaded, some branches have a different setting for database availability.

     Note:
     The Polaris database always appears in the Databases tab of the Find Tool even if it has not been made available to the workstation's log-on branch. (Remote databases do not appear in the list if they are not available for the branch.) If the staff client user receives the message **You do not have access to the Polaris database**, be sure the branch is checked in the Database Availability table for the Polaris database.
   - To set database availability for an individual branch, select the check box for the branch name.
4. Select **File, Save**.

   The database is added to the Search Databases policy table for each branch that was selected, and is available for Find Tool searches in the staff client.

   Note:
   At the branch level, you can open the Search Databases policy table for a specific branch and delete any database you do not want to display in the Find Tool for that branch.

Related Information

Remote search target access in PowerPAC - See "Managing Federated Search Targets" in the *Polaris Public Access Administration Guide 4.1R2*.

Offering the Polaris Database as a Remote Target

In addition to setting up other sites as remote targets for Polaris to query, you can offer your Polaris database as a remote target to other sites to search via Z39.50. This feature allows material vendors, for example, to search your database for bibliographic records when creating your shelf-ready items. Give the remote sites the IP address and logon information for your database. For a list of the Bib-1 use attributes assigned to search access points, see "Bib-1 Use Attributes in Polaris Searches" on page 182.

Important:
[DatabaseName.] is required if the target Microsoft SQL Server database is installed as an instance. This is always the case, for example, for Polaris Hosted customers. Set **[DatabaseName]** to the Microsoft SQL Server instance name, followed by a period.

You can offer the following Polaris targets:

- **[DatabaseName.]PAC** - Returns bibliographic records including all holdings (imported and manually created) set to display in PAC in the results list. If an item record is suppressed from display in PAC, it will not appear as an 852 tag regardless of whether it was manually created or imported. If a bibliographic record is suppressed from display in PAC, it will not appear in the results set.

  If an item is linked to a Purchase Order (PO) line item, Polaris fabricates a subfield $e for the 852 tag that contains the PO line item ID and PO line item segment number, separated by a hyphen. This feature accommodates vendors who cannot use enriched EDI to obtain this information, which they need to provide full MARC records with embedded holdings for shelf-ready cataloging.

Tip:
Polaris fabricates 99x tags in the bibliographic record for internal use in PAC. Because 99X tags in Polaris records are fabricated and proprietary, they are suppressed from the PAC results set.

- **[DatabaseName.]ODC** - Similar to **[DatabaseName.]PAC**, but disregards the items' **Display in PAC** settings and returns all holdings. This target supports opening day collections for new branches or branches that are replacing large portions of their collections, perhaps due to fire or flood. On-order items are included but can be suppressed from PAC until branch renovations are complete, the items are shipped, and they can be circulated.
- **[DatabaseName.]BR** - Returns bibliographic records including any holdings (949s, 852s, and so forth) that were imported, but not holdings/items that were manually generated, in the results set.

- **[DatabaseName.]BT** - Suppresses all holdings, imported and manually created, regardless of their status, from the bibliographic records in the results set. This is useful, for example, for vendors who are supplying full MARC records with holdings (949s, 852s, and so forth) that should not conflict with existing holdings information in your bibliographic records.
- **[DatabaseName.]AR**. - Returns authority records.

See the following topics:

- "MARC 852 Tag Subfields for PAC, ODC, & BR Databases" on page 181
- "Bib-1 Use Attributes in Polaris Searches" on page 182

MARC 852 Tag Subfields for PAC, ODC, & BR Databases

When a third-party searches the PAC, ODC, or BR databases, the following MARC 852 tag subfields are included for each item record/issue:

852 Subfield	*Item Field*
$a	Assigned branch name
$b	Collection name
$d	Shelf location
$e	Purchase order line item segment number
$h	Classification number
$i	Cutter number
$k	Call number prefix
$m	Call number suffix
$o	Assigned branch identifier
$p	Barcode
$r	Item/issue status
$u	Due date
$v	Volume number
$w	Material type
$x	Public note
$y	Item type (monograph =1; serial=2)
$1	Last circulation date
$4	Chronology date
$9	Number of course reserve links
$7 (PAC and ODC databases)	Loanable outside system (true = Yes; false = No)

Bib-1 Use Attributes in Polaris Searches

Polaris assigns standard Bib-1 use attributes to search access points wherever possible, and proprietary Bib-1 use attributes where necessary.

The Polaris Type of Material (TOM) qualifier is based on the Bib-1 use attribute 1031. With respect to MuseGlobal, the TOM access point maps to a DCMI/TYPE value:

Note:
If a TOM code used as a search limiter cannot be mapped to a DCMI/TYPE value, an error message appears.

TOM	*DCMI*
bks	book
per	article
rec	audio
mss	manuscript
map	map
kit	object
ser	journal
ebk	eBook

Note:
For a complete list of standard Bib-1 use attributes, see **http://www.loc.gov/z3950/agency/defns/bib1.html**

Bib-1 Use Attributes	*Mnemonic*	*Description*
Standard		
4	TI	Title
5	SE	Series
7	ISBN	ISBN
8	ISSN	ISSN
9	LCCN	LCCN
12	CN	Control number
13	DD	Dewey classification
14	UDC	UDC classification
16	LC	LC classification
17	NLM	NLM classification
18	NAL	NAL classification

Bib-1 Use Attributes	*Mnemonic*	*Description*
20	CALL	Call number
21	SU	Subject
31	PD	Publication date
50	GOV	Gov Doc classification
5	PN	Publisher’s number
54	LA	Language
60	CODEN	CODEN
63	NOTE	General notes
1003	AU	Author
1007	OCN	Other system number
1016	KW	All keyword fields
1017	SC	Keyword
1018	PUB	Publisher
1027	STRN	STRN
1031	TOM	Type of material
1211	OCLC	OCLC number
Proprietary (Range: 5000-10000)		
5000	AB	Assigned Branch
5001	BC	Barcode
5006	COL	Collection
5015	Genre	Genre
5026	MAT	Material type
5027	NLC	NLC classification
5028	OWN	Record owner
5039	STATB	Record status
5045	TA	Target audience
5053	MSH	Main Subject Heading
5054	MAH	Main Author Heading
5055	MSE	Main Series Entry
5148	OWNER	Ownership Filter
5159	LF	Literary Form
5160	CPST	Children's PAC Search Target
5178	CRSSTAT	Course Reserve Status
5194	OSI	OSI number
5195	SOA	SOA number
5196	UPC	UPC number
5206	DIP	Display in PAC

Bib-1 Use Attributes	*Mnemonic*	*Description*
5207	ILL	ILL
5244	MTE	Main Title Entry
5245	MCE	Main Call Number Entry
5249	SCN	Standard identifier number
5253	ACL	Access Control List (MRMS)
5254	CPRT	Copyright (MRMS)
5255	DLD	Data Link Description (MRMS)
5256	FNAME	File Name (MRMS)
5257	MIME	MIME Type (MRMS)
5258	RRC	Resource Record Collection (MRMS)
5259	RRO	Resource Record Organization (MRMS)
5260	FAD	First available date
9997	TIMEOUT	TIMEOUT

Specifying Report Servers

Polaris uses SQL Server Reporting Services for reports, notices, and most printing tasks in the staff client. Microsoft Report Manager and Report Web Service are installed on your Web “server,” which may be located on your Polaris Web server, a stand-alone report Web server, or another server you specify. Because report definitions, folders, and resources are published and managed as a Web service, SQL Server Reporting Services requires access to the Web server. You specify the URL for the report server and Reporting Services in Polaris Administration.

Report access and management are controlled with Reporting Services security. A Polaris Administration setting provides the option of using Windows authentication to streamline report security assignments. If you use a proxy server, you also specify the proxy server for use with reporting services in Polaris Administration.

You identify report and proxy servers with Staff Client profiles, available at the system, library, branch, and staff levels. If your Polaris system is used in a consortium, different servers can be specified for different organizations as appropriate.

Note:
You need Adobe® Reader® 8.0 on any workstation that runs reports, notices, and many staff client printing tasks.

See the following topics:

- “Security for Reports” on page 186
- “Specify a server for Reporting Services” on page 187
- “Specify a proxy server for Reporting Services” on page 190

Security for Reports

You can employ two different strategies for managing Reporting Services security, relying on either the user's logon credential or Windows authentication for a user account you set up for that specific purpose.

By default, the report server uses the user's current logon credential to authenticate the user. If you need to limit users to certain reports, you can manage their rights with Reporting Services security, granting different levels of access and use as necessary. You can create groups such as Circulation Reports and Acquisitions Reports, grant the group the appropriate rights, and place the user in the appropriate groups, or you can manage the rights on an individual basis, user by user. Note that rights are inherited in Reporting Services. For example, if you grant Browse rights to a group on the Polaris level, the rights also apply to the subordinate folders such as **System** and **Circulation**, and to the reports within them. You can delete the inherited rights for a subordinate folder or individual reports as necessary. If a user has no rights to a report, the report is not displayed in the Polaris Reports window in the staff client.

Note:
You can also specify which organizations are displayed for selection as report parameters.

If there is a custom folder at the location **/Polaris/Custom** in the report root folder, users can right-click a system report in the Polaris Reports window in the staff client, and select **Customize** from the context menu. The custom report is placed in the Custom folder in the Report Manager, ready for editing. If there is no custom folder at **/Polaris/Custom**, the **Customize** menu option and the Custom folder are not displayed in the Polaris Reports window. For more information about customizing reports, see "Customize a report" in the *Polaris Basics Guide 4.1R2*.

Important:
The Polaris staff client uses reports in the Internal folder for many common workflows. All staff client users need Browse rights to the Internal folder.

Alternatively, you can use Windows authentication for accounts you set up for the purpose, instead of the individual staff login credential. Set up appropriate Windows user accounts such as ReportUser and NoticesUser and grant these users the appropriate rights in Reporting Services. In Polaris Administration, set up the Report Server at the system level without Windows authentication, then specify Windows authentication at the branch or staff member level, using the special-purpose user accounts you set up. This is a convenient way to assign the appropriate Reporting Services rights if you do not need to assign rights for specific reports and notices on a person-by-person basis.

Also, the Windows Authentication option allows you to restrict access to reports from the Reporting Services browser, but allow staff with the Polaris **Access reports and notices** permission to see reports in the Polaris Reports window in the staff client.

Example:
You set Report Services rights for an account called PolarisReports so that the account has browse rights to all reports. Then, in Polaris Administration, you set the Report Server to use Windows authentication, and specify the authentication account as PolarisReports. Since no staff member is PolarisReports, reports are not visible to staff in the Report Services browser, but they are displayed in the Polaris Reports window in the staff client.

Regardless of your security strategy for Reporting Services, staff members (and the workstations they use) need the *Polaris* permission **Access reports and notices** to open the Polaris Reports window from the Polaris Shortcut bar in the staff client. For more information about managing Polaris permissions, see "Granting Permissions" on page 106.

See the following topics:

- "Specify a server for Reporting Services" on page 187
- "Specify a proxy server for Reporting Services" on page 190

Specify a server for Reporting Services

Follow these steps to specify the server where SQL Server Reporting Services is installed, set up Windows authentication to the server (optional), and specify what organizations are available for selection in report parameters.

Note:
If your Web server is outside the firewall, you can also specify a proxy server to provide access to the Web server for SQL Server Reporting Services. See "Specify a proxy server for Reporting Services" on page 190.

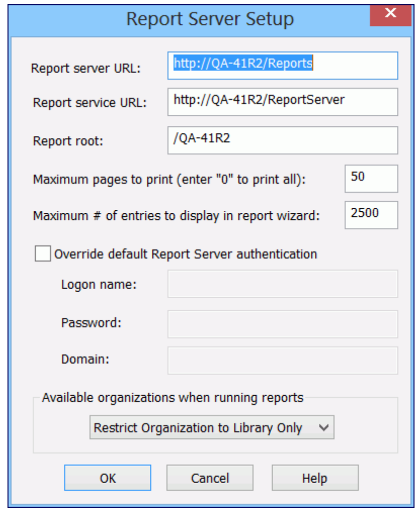
1. In the Administration Explorer tree view, open the **Profiles** folder for the organization or staff member, and select the **Staff Client** tab in the details view.

   Note:
   For more information about listing staff members in the Explorer, see "List staff members in the Explorer" on page 98.

2. Double-click **Report Server**.

   The Report Server Setup dialog box appears.

   Note:
   The Maximum # of entries to display in report wizard option is available at the system level only.



3. Type the URL for the report server in the **Report Server URL** box.

   The URL may begin with **http://** or **https://**

4. Type the URL for Report Services (Report Manager and Report Designer, if you use it) in the **Report service URL** box.

   Important:
   Keep the Report Services URL confidential. Limiting access to the Report Manager helps to prevent missing reports and missing printing services.

5. Specify the appropriate report root folder in the **Report Root** box.

   The default is **/Polaris**.

   Note:
   A consortium may set up a unique root folder for each member library system. Specify the appropriate root folder for the organization you are setting up.

   These characters cannot be used in the **Report Root** field:

   ; (semi-colon)
   ? (question mark)
   : (colon)
   @ ('at' sign)
   & (ampersand)
   = (equals sign)
   + (plus sign)
   $ (dollar sign)
   , (comma)
   \ (back slash)
   * (asterisk)
   < (less than sign)
   > (greater than sign)
   | (vertical pipe)
   " (double quote)

6. Specify the number of pages that trigger a message when the report is run.

   A dialog box will appear when the PDF would exceed the specified number of pages, so that staff members do not have to wait a long time for a report to generate. When the dialog box appears, the staff member can choose to generate all the pages, or a limited number of pages.

7. (System level only) Set the maximum number of entries that should appear in list boxes and other controls in the report wizard, where users select report parameters from a list.

   The default setting is 2500. The maximum value is 9999.

8. If you want to use authentication for a special Windows account instead of the staff user's logon credential, follow these steps:

   a) Select (check) **Override default Report Server authentication**.

   The log-in information boxes become available for use.

   b) Type the log-in name, password, and domain name in the appropriate boxes.

   For more information about this setting, see "Security for Reports" on page 186.

9. To set the organizations that appear as parameter options when the staff member sets up a report to run, select one of the following options in the **Available organizations when running reports** box:

   - **Unrestricted** - Any or all organizations in the system are available for selection in the **Organizations** report parameter list.

     Note:
     Certain reports are available only at the branch level. For these reports, the **Organizations** list is in alphabetical order. For reports available at the system, library, or branch level, the organizations are listed in hierarchical order (system, library A, library A's branches, library B, library B's branches, and so forth).

   - **Restrict Organization to Branch Only** - Only the staff member's logged-on branch appears in the **Organizations** list.
   - **Restrict Organization to Library Only** - The **Organizations** list includes the staff member's logged-on branch and the other branches associated with the parent library of the logged-on branch.

10. Click **OK** on the dialog box.

11. Select **File, Save**.

Related Information

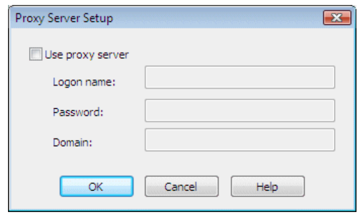
Running reports from the staff client - "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*

Specify a proxy server for Reporting Services

SQL Server Reporting Services requires access to the Web server. If you use a proxy server, specify the proxy server to provide access to the Web server. Follow these steps to specify the proxy server.

1. In the Administration Explorer tree view, open **Profiles** for the organization, and select the **Staff Client** tab in the details view.
2. Double-click **Proxy Server**.

   The Proxy Server Setup dialog box appears.



3. Select (check) the **Use proxy server check box**.

   The log-in information boxes become available for use.
4. Type the log-in name, password, and domain name for the proxy server in the appropriate boxes.
5. Click **OK** on the dialog box.
6. Select **File, Save**.

Ensuring Locale and Time Consistency

Transaction time stamps are derived from both the server and the staff client. If the time setting is different on these computers, you may notice discrepancies in logs and transactions. Using Staff Client profiles, you can enforce matching locale settings for a logged-in user and the application server, and enable automatic checking for consistency in date and currency formats, as well as the time recorded for logs and transactions.

See the following topic:

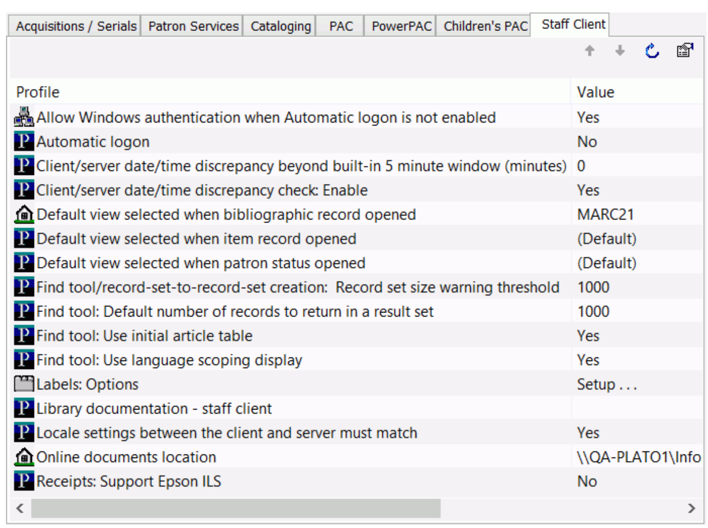
- "Enable locale and time consistency checking" on page 191

Enable locale and time consistency checking

Follow these steps to enable automatic checking for locale and time consistency between client and server.

1. In the Administration Explorer tree view, open **Profiles** for the organization or workstation, and select the **Staff Client** tab.

   Note:
   See "List workstations in the Explorer" on page 89.



2. To enforce consistency in date and currency formats, double-click **Locale settings between the client and server must match** and set the profile to **Yes** (default value).

If this profile is set to **Yes** and the client and server settings do not match, the staff client log-in fails and a message regarding the locale settings is displayed.

> **Note:**
> This setting does not apply to offline clients.

3. To enforce consistency in time stamps, follow these steps:

a) Double-click **Client/server date/time discrepancy check: Enable** and set the profile to **Yes** (default value) to activate the check. (This check takes place after the locale setting check described in step 2, if you have enabled that option.)

b) The system allows a five-minute discrepancy between client and server time settings. If you want to add more time to the allowable five minutes, double-click **Client/server date/time discrepancy beyond built-in 5 minute window (minutes)** and specify the number of additional minutes (0-999, default 0).

If you enable the discrepancy check, a message is displayed at staff client log-in when the discrepancy between client and server time settings exceeds the system's five-minute margin but is less than any additional minutes you have set. When the discrepancy between client and server time settings exceeds the system's five-minute margin plus any additional minutes you have set, a different message is displayed and the log-in fails.

4. To customize the warning and failure messages for discrepancy checking, set either or both of these profiles:

> **Note:**
> These profiles are available at the organization level only (not at the workstation level).

- **Warning message** - Double-click **Client/server date/time discrepancy warning message** and type your custom text. The default message is **Warning: Client time setting is more than 5 minutes different from server setting.**
- **Failure message** - Double-click **Client/server date/time discrepancy violation message** and type your custom text. The default message text is **Log-in failure! Client time setting discrepancy with the server setting is beyond the configured threshold!**

5. Select **File, Save**.

Setting Search Tool Characteristics

Certain Polaris Administration settings affect the options available for searching in the staff client and the PAC, and identify the words that are ignored or included in searches.

See the following topics:

- "Defining Leading Articles" on page 193
- "Setting Language Display" on page 196
- "Viewing Title and Author Elements" on page 198
- "Setting Find Tool Profiles" on page 199

Defining Leading Articles

The Initial Articles policy table specifies words that can be stripped from the beginning of Find Tool exact match search strings for the following types of records:

- 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)

If the **Use Initial Articles Table** option is checked on the Find Tool Settings tab, the words specified in the table are stripped from the beginning of the search string. (You can specify a default setting for this Find Tool option. See "Setting Find Tool Profiles" on page 199.)

Initial articles can be identified from the system, library, and branch levels, but the entries are shared by all organizations because searching applies to the entire Polaris catalog. Use the Administration Explorer to access the Initial Articles policy table. You cannot display the table from an organization workform. The **Modify initial articles table: Allow** permission is required to work with this table.

See the following topic:

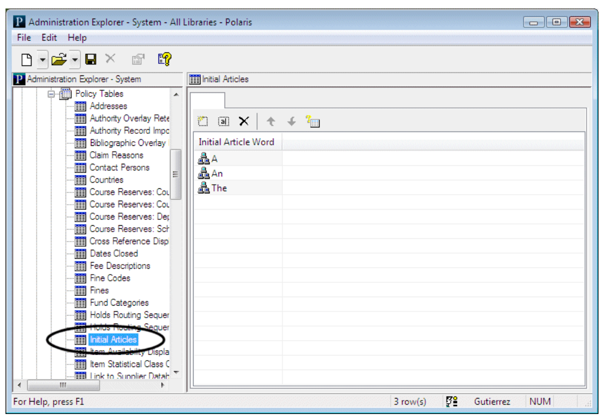
- "Add an initial article entry" on page 194

Add an initial article entry

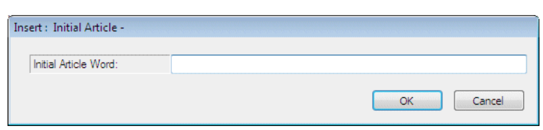
Follow these steps to define a new word as an initial article in Polaris. Entries added at any level are assigned to the system.

1. In the Administration Explorer tree view, open **Policy Tables** for an organization, and select **Initial Articles**.

   The Initial Articles table appears in the details view.



2. Click  to display the Insert Initial Articles dialog box.



3. Type the word that you want Polaris to ignore in the beginning of Find Tool exact match searches for certain records, and click **OK**.

If the **Use Initial Articles Table** option is checked on the Find Tool Settings tab, the word you specify is stripped from the beginning of the search string in exact match searching.

The Insert Initial Articles dialog box closes, and the new initial article is displayed in the table. **Modification Pending** appears in the status bar.

4. Select **File**, **Save**.

Related Information

- **Modify a table entry** - Select the entry and click . Changing an initial article entry changes the entry for all organizations in Polaris.
- **Delete a table entry** - Select the entry and click . Deleting an initial article removes the word for all organizations in Polaris.
- **Setting the Find Tool default for initial articles** - See “Setting Find Tool Profiles” on page 199.

Setting Language Display

The MARC Language Scoping Display policy table identifies the languages that display as options for limiting (scoping) searches to material published in specific languages. You can set a language to be displayed as a scoping option in the Polaris Find Tool (staff client), in Polaris Power PAC, or both, and set the order in which the languages are displayed. The languages can be identified at the system, library, and branch levels, but the entries are shared by all organizations.

Polaris Library Systems periodically updates the languages available to add to the policy table, after the MARC 21 changes are posted. The MARC language codes are stored in a table that cannot be accessed from the Polaris user interface. SQL scripts are used to update the language codes in the database. Once the database is updated, you can add any MARC language to the table to use in scoping searches. Over 4,000 languages are currently available.

Use the Administration Explorer to display the MARC Language Scoping Display policy table. You cannot display the table from an organization workform. The **Modify MARC language scoping display table: Allow** permission is required to work with this table.

See the following topic:

• "Add a language display entry" on page 196

Add a language display entry

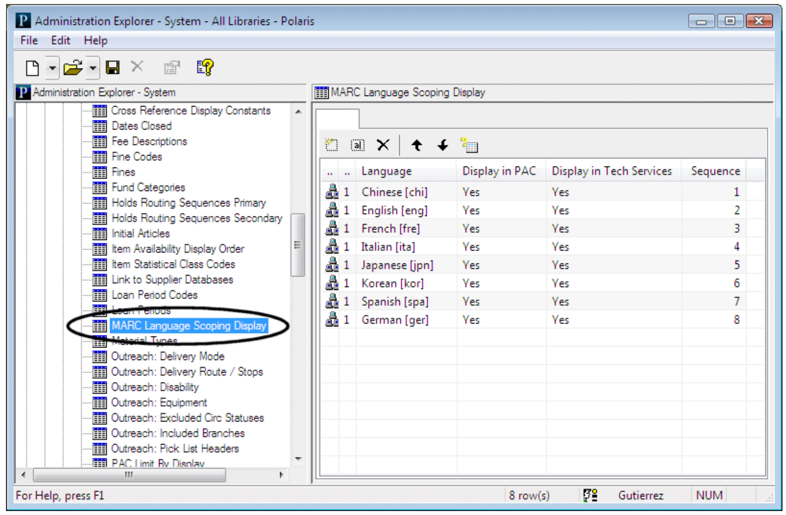
Follow these steps to add a MARC language entry to Polaris search tools. Entries added at any level are used by all organizations.

> **Note:**
> This table does not affect the languages available for patron records. To add a language selection for patron records, contact your Polaris Site Manager.

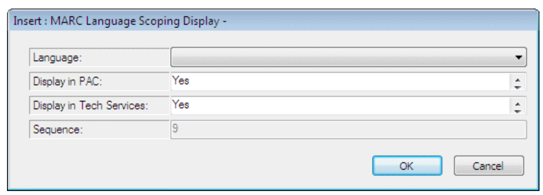
1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **MARC Language Scoping Display**.

   The MARC Language Scoping Display table appears in the details view.

Tip:
You can sort the language entries in the table by clicking the column headers. Sorting the entries does not affect how they display on the search tools. To change the display order, use the arrows on the table tool bar.



2. Click  to display the MARC Language Scoping Display dialog box.



3. In the **Language** box, select the language you want to display in the search tools.
4. In the **Display in PAC** box, indicate whether the language should be listed as an option for scoping PowerPAC searches.

   Note:
   You must also set the PowerPAC profile **Scoping: Use MARC language scoping display table** to **Yes** to display the specified languages as scoping options in the PowerPAC Search Options display.

5. In the **Display in Tech Services** box, indicate whether the language should be listed for scoping Polaris Find Tool searches in the staff client.

   Note:
   You must also set the Staff Client profile **Find Tool: Use Language Scoping Display** to **Yes** to display the specified languages as scoping options in the Polaris Find Tool. See "Set the Find Tool SQL permission blocks override" on page 200.

6. Click **OK** on the dialog box.

   The Insert MARC Language Scoping Display dialog box closes and the new entry is displayed in the policy table. **Modifications Pending** appears in the status bar.

7. Select **File, Save**.

Viewing Title and Author Elements

Database tables specify the tags displayed for titles and authors in Polaris search results. The Primary Display Title table controls the title display. By default, a record's displayed title is pulled from the 245 tag. If the bibliographic record does not contain a 245 tag, the primary title is pulled from the Uniform Title (130 tag). You can view the default title tags, subfields, and their order of precedence in the Primary Display Title table. If a subfield is included in the table, it is also used in sorting search results by title.

The Primary Display Author table controls the author display. By default, a record's displayed author is pulled from the 100 tag, then from the 110 tag, then from the 111 tag. You can view the default author tags, subfields, and their order of precedence in the Primary Display Author table. If a subfield is included in the table, it is also used in sorting search results by author.

You can view these read-only tables in Polaris Administration under **Database Tables** for any organization. If you want to change the Primary Title Display or Primary Author Display table, contact your Polaris Site Manager. These tables are used by all organizations in the system.

Note:
These tables do not affect what is *indexed* for keyword or browse searches, only what is displayed.

Setting Find Tool Profiles

The Polaris Find Tool is the basic tool for finding and working with records and other objects in the staff client and generating ad hoc reports. You can set default values for the Find Tool that specify result limits, the use of initial articles, and the languages available for scoping. Find Tool settings are available on the Staff Client tabbed page for profiles. In general, these profiles can be set for each organization, workstation, and staff member. However, the **Find Tool: Filter search results by permission** can be set only at the system level. When this profile is set to **Yes**, only records for which the user has access permission are returned in the search results list. When the profile is set to **No**, records for which the user does not have access permission are also returned (except those owned by other individual staff members). For more information about using the Polaris Find Tool, see "Finding Polaris Records" in the *Polaris Basics Guide 4.1R2*.

See the following topics:

- "Set Find Tool filtering by permission" on page 199
- "Set the Find Tool SQL permission blocks override" on page 200
- "Set Find Tool defaults" on page 201

Set Find Tool filtering by permission

Follow these steps to set the Polaris Find Tool to filter search results according to the permissions of the staff member and workstation.

1. Select **Administration**, **Explorer**, **System** on the Polaris Shortcut Bar.

   The Administration Explorer appears.

2. In the Explorer tree view, select **Profiles** under the System folder, and select the **Staff Client** tab in the details view.
3. Double-click **Find Tool: Filter search results by permission**, and select an option:
   - **Yes** - Search results are filtered so that only records for which the user has access permission are returned in the search results list.
   - **No** - Search results are not filtered by permission. Records for which the user does not have access permission are also returned (except those owned by other staff members). The appropriate permission is still required to open a record from the results list.
4. Select **File**, **Save**.

   Note:
   To see the effects of your changes in the staff client, exit the staff client and log back in.

1-2-3

Set the Find Tool SQL permission blocks override

A staff member's ability to use the Find Tool SQL mode is controlled by three permissions:

- **Find Tool: Access SQL search mode** - User can enter and search with a one-time SQL search, or use a saved SQL search, but cannot save an SQL search.
- **Find Tool: Create or modify named SQL searches** - User can enter a one-time SQL search, create and save an SQL search, and modify an existing saved search.
- **Find Tool: Delete named SQL searches** - User can delete a saved SQL search.

A staff member who has only access permission to the SQL search mode receives a permission block message when attempting save, modify, or delete an SQL search. You can allow a supervisory staff member to override the permission block. Follow these steps to allow a staff member to override the SQL permission block. You must set this profile for individual staff members.

1. Display the staff member record in the Administration Explorer. See "List staff members in the Explorer" on page 98.
2. In the Explorer tree view, select **Profiles** under the staff member folder, and select the **Staff Client** tab in the details view.
3. Double-click **Find Tool: Override SQL search blocks**, and select an option:
   - **Yes** - This staff member can override the block message for saving a SQL search, modifying a saved SQL search, or deleting a saved SQL search.

     Important:
     When this profile is set to **Yes** for a staff member, that staff member must *also* have the permissions they are overriding.
   - **No** - This staff member cannot override the permission block.
4. Select **File, Save**.

   Note:
   To see the effects of your changes in the staff client, exit the staff client and log back in.

Related Information

- **More about permissions** - See "Granting Permissions" on page 106.
- **SQL searches in the Find Tool** - See "Finding Polaris Records" in the *Polaris Basics Guide 4.1R2*.

1-2-3

Set Find Tool defaults

Follow these steps to set default characteristics for Polaris Find Tool searches and results displays. You can set the defaults at the organization, workstation, or staff member level. Staff member settings take precedence over workstation settings.

1. In the Administration Explorer tree view, select **Profiles** for the organization, workstation, or staff member, and select the **Staff Client** tab in the details view.

   Note:
   For more information about listing workstations and staff members in the Explorer, see “List workstations in the Explorer” on page 89 and “List staff members in the Explorer” on page 98.

2. To set the default number of records to return as search results, double-click **Find Tool: Default number of records to return in a result set**, and type a number. The limit does not apply to count-only search results. Users can temporarily change the number of records to return with the Find Tool **Retrieval Limit** setting.

   Higher values may require longer search times. Lower values may impact the quality of search results.

   Example:
   If the limit is set at 1,000 titles (typical), but a search yields 1,500 titles, only the first 1,000 titles to satisfy the search terms display in the results list.

3. To set the number of records that will trigger a warning message when a user has opted to add all the results to a record set, double-click **Find tool/record-set-to-record-set creation: Record set size warning threshold** and type a number.

   If the results set reaches or exceeds this number, and the user has chosen to create a record set from the results, the warning message gives the user the opportunity to cancel the record set. This message is useful for count-only search result sets, which may be very large because the result set limit is not applied to them. This setting also triggers the warning message when you create a record set from another Cataloging record set - item to bib, bib to item, authority to bib, or bib to authority. For more information about record set creation from the Find Tool, see “Creating and Using Record Sets” in the *Polaris Basics Guide 4.1R2*. For more information about Cataloging record sets, see “Using Cataloging Record Sets” in the *Polaris Cataloging Guide 4.1R2*.

4. To specify the default setting for the **Use Initial Article Table** check box on the Polaris Find Tool, double-click **Find Tool: Use Initial Article Table**, and select one of the following options:
   - **Yes** - The **Use Initial Articles Table** box (**Settings** tab) is selected (checked) as the default setting when the Find Tool opens. This means that the search uses the Initial Articles table that specifies words to be stripped from the beginning of exact match searches for bibliographic title, bibliographic series, and item title search strings. See "Defining Leading Articles" on page 193. Using the table (that is, stripping initial articles) can significantly improve search response times. The check box can be cleared when the Find Tool is opened.
   - **No** - The **Use Initial Articles Table** box is cleared as the default setting when the Find Tool opens. This means that the Initial Articles table is not checked, so no words are stripped out. Catalogers may not want to use the initial article table in their searches to identify non-filing indicator problems. The check box can be selected (checked) when the Find Tool is opened.

5. To specify the set of languages available for scoping searches, double-click **Find Tool: Use Language Scoping Display**, and select **Yes** or **No**:
   - **Yes** - The languages listed in the **Value** box when you limit a search by language, and in the **Value** box on the Scoping tabbed page, are limited to the entries specified in the MARC Language Scoping Display policy table for the organization. See "Setting Language Display" on page 196.
   - **No** - All languages defined by the MARC 21 format are displayed in the **Value** boxes.

Related Information

- **Staff Client profiles reference list** - See "Staff Client Profiles Reference" on page 254.
- **PAC search limits** - In the PAC, you may experience decreased performance for searches with large results sets if your server capacity is limited. To improve performance, you can adjust the maximum number of records to return. The profile **Result set: Maximum number of records to return**, available at the system, library, and branch levels, control this limit. The profile is available on the PowerPAC and Children's PAC tabbed pages. You set it separately for each PAC.

  Note:
  If you lower the maximum number of records to return, relevancy ranking may be less effective.

Setting Preferred Workform Views

You can set the Bibliographic Record workform, Item Record workform and Patron Status workform to open to specific views, using Staff Client profiles available at the system, library, branch, workstation, and staff member levels. Setting them at the staff member level can accommodate the workflows of specific staff members. For example, a cataloger may want the Item Record workform to open to the cataloging view every time she opens the workform, regardless of whether the workform is opened to create a new record or an existing item record is opened from a Find Tool results list.

See the following topics:

- "Set the Bibliographic Record workform opening view" on page 203
- "Set the Item Record workform opening view" on page 204
- "Set the Patron Status workform opening view" on page 206

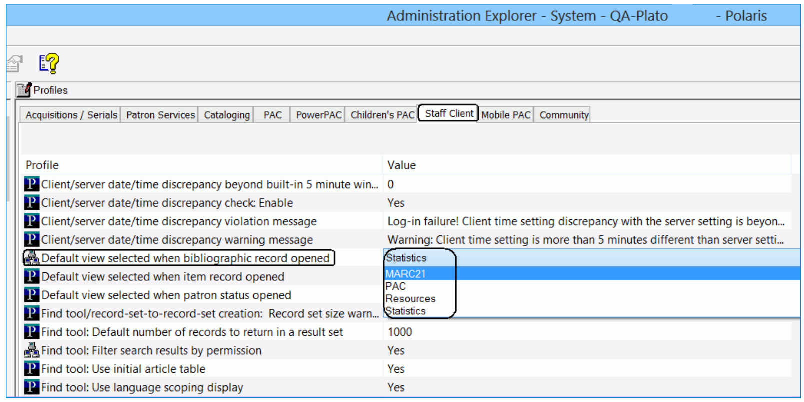
Set the Bibliographic Record workform opening view

Follow these steps to set a preferred view to be displayed when the Bibliographic Record workform is opened. You can set this option at the organization, workstation, or staff member level. Staff member settings take precedence over workstation settings.

1. In the Administration Explorer tree view, select **Profiles** for the organization, workstation, or staff member, and select the **Staff Client** tab in the details view.

   Note:
   For more information about listing workstations and staff members in the Explorer, see "List workstations in the Explorer" on page 89 and "List staff members in the Explorer" on page 98.

2. Double-click **Default view selected when bibliographic record opened**.
3. Select a workform view from the drop-down list.



- If **Default** is selected, the Bibliographic Record workform opens to different views depending on the circumstances. For example, when you are creating a new bibliographic record, the workform opens to the MARC21 view.
- If a specific view is selected, the Bibliographic Record workform always opens to the selected view, regardless of how it is opened.

4. Select **File, Save**.

Related Information

- **Staff Client profiles reference list** - See "Staff Client Profiles Reference" on page 254.
- **Acquisitions workflows** - See the *Polaris Acquisitions Guide 4.1R2*.
- **Cataloging workflows** - See the *Polaris Cataloging Guide 4.1R2*.
- **Circulation workflows** - See the *Polaris Patron Services Guide 4.1R2*.

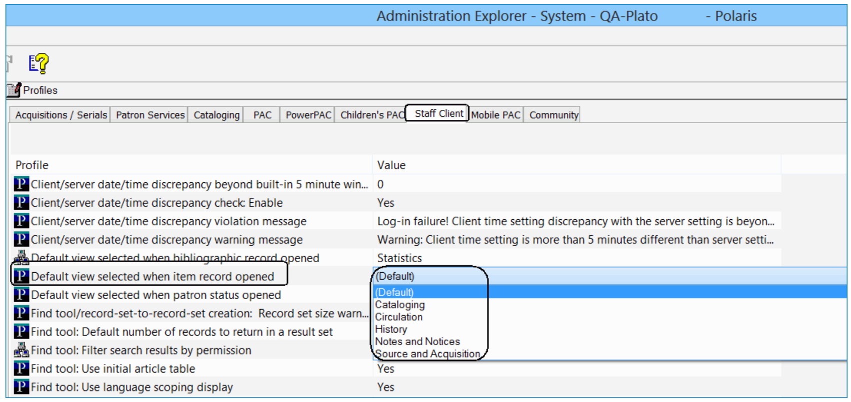
Set the Item Record workform opening view

Follow these steps to set a preferred view to be displayed when the Item Record workform is opened. You can set this option at the organization, workstation, or staff member level. Staff member settings take precedence over workstation settings.

1. In the Administration Explorer tree view, select **Profiles** for the organization, workstation, or staff member, and select the **Staff Client** tab in the details view.

   Note:
   For more information about listing workstations and staff members in the Explorer, see "List workstations in the Explorer" on page 89 and "List staff members in the Explorer" on page 98.

2. Double-click **Default view selected when item record opened.**
3. Select a workform view from the drop-down list.



- If **Default** is selected, the workform opens to the Cataloging view when creating a new item, the Source and Acquisition view when opening an item record from a purchase order or invoice line item, and the Circulation view in all other cases.
- If a specific view is selected, the Item Record workform always opens to the selected view, regardless of how it is opened.

4. Select **File, Save**.

Related Information

- **Staff Client profiles reference list** - See "Staff Client Profiles Reference" on page 254.
- **Acquisitions workflows** - See "Acquisitions Topics" in the *Polaris Acquisitions Guide 4.1R2*.
- **Cataloging workflows** - See "Cataloging Topics" in the *Polaris Cataloging Guide 4.1R2*.
- **Circulation workflows** - See "About This Guide" in the *Polaris Patron Services Guide 4.1R2*.

Set the Patron Status workform opening view

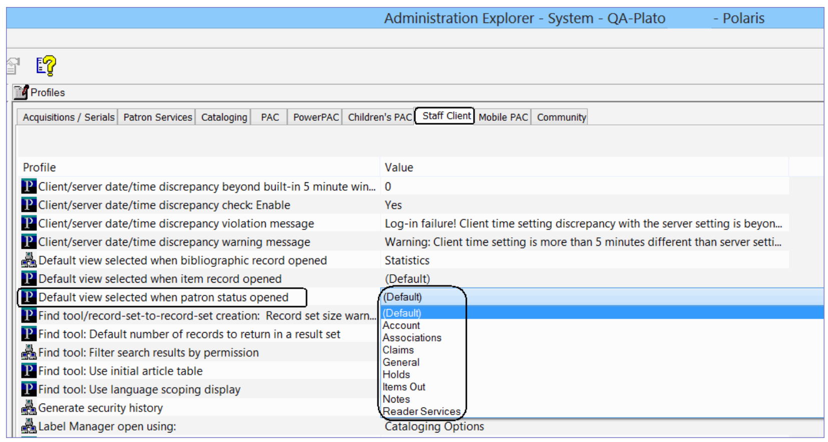
Follow these steps to set a preferred view to be displayed when the Patron Status workform is opened. You can set this option at the organization, workstation, or staff member level. Staff member settings take precedence over workstation settings.

1. In the Administration Explorer tree view, select **Profiles** for the organization, workstation, or staff member, and select the **Staff Client** tab in the details view.

   Note:
   For more information about listing workstations and staff members in the Explorer, see "List workstations in the Explorer" on page 89 and "List staff members in the Explorer" on page 98.

2. Double-click **Default view selected when patron status opened**.

3. Select a workform view from the drop-down list.



- If **Default** is selected, the Patron Status workform opens to the Items Out view.
- If a specific view is selected, the Patron Status workform always opens to the selected view.

  Note:
  Certain situations take precedence over the default setting or your selection. For example, when the Patron Blocks dialog box appears at circulation and the staff member selects an option to resolve a block, the Patron Status workform opens to the appropriate view regardless of the profile setting. For example, if the block is **Patron owes money**, the Patron Status workform - Account view opens.

4. Select **File**, **Save**.

Related Information

- **Staff Client profiles reference list** - See "Staff Client Profiles Reference" on page 254.
- **Circulation and patron services workflows** - See the *Polaris Patron Services Guide 4.1R2*.

Collecting Transaction Statistics

This unit covers the following topics:

- "Logging Transactions" on page 207
- "Polaris Transactions Database" on page 209
- "Statistical Summary Report" on page 212
- "Sending Circulation Statistics to Library Journal" on page 216

Logging Transactions

The Polaris transaction log records when an action occurs, the identification number of the user who did the action, and the records that the action affected. You can use the log to track operational statistics, troubleshoot problems, and generate reports. You determine what kinds of actions are logged, out of the thousands of Polaris transactions that can occur every day. The same transactions are recorded for all organizations in your Polaris installation.

Entries in the Transaction Logging database table determine which transactions are logged. The Transaction Logging table is available only from the Administration Explorer. You must have the **Modify transaction logging table: Allow** permission to work with this table.

> **Note:**
> To log *Polaris PowerPAC* transactions, set the PowerPAC profile **Enable logging of transactions** (system level) to **Yes**.

See the following topic:

- "Choose the transactions to log" on page 208

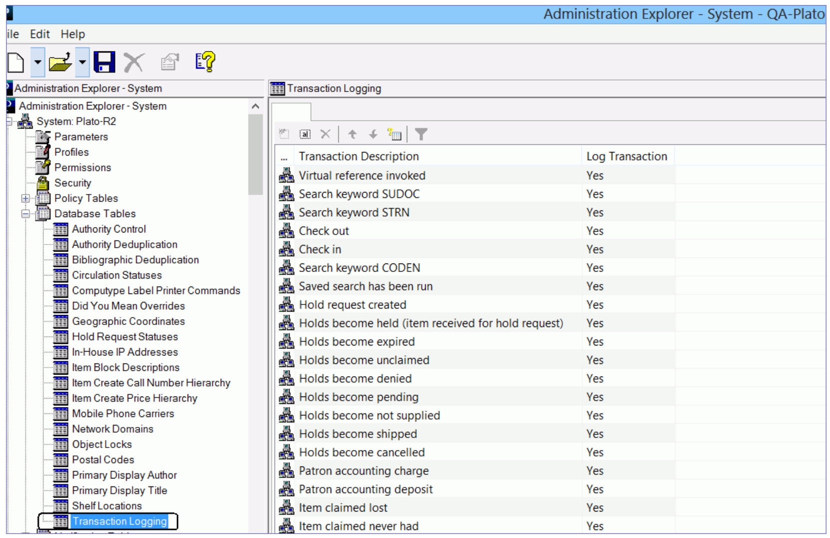
1-2-3

Choose the transactions to log

Follow these steps to set which Polaris transactions are logged.

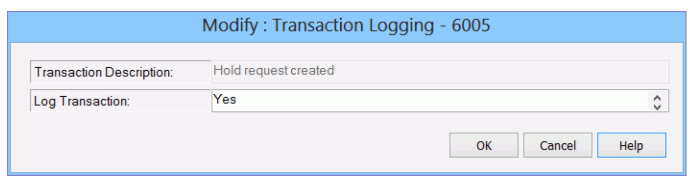
1. In the Administration Explorer tree view, open the **Database Tables** folder for the system, and select **Transaction Logging**.

   The Transaction Logging table appears in the details view.



2. Double-click the action you want to set.

   The Modify Transaction Logging dialog box appears.



3. In the **Log Transaction** box, select **Yes** to log every occurrence of the selected action, or select **No** if you do not want to log any occurrence of the selected action.
4. Click **OK**.

   The Transaction Logging entries are displayed. The new logging setting is shown in the selected entry.
5. Select **File, Save**.

   Important:
   If you change any transaction logging setting, you must restart the Message Queue service on the application server for the change to take effect.

Related Information

- **Reports** - Polaris provides a variety of reports that help you track and summarize transactions. For information about running reports, see "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*. Custom reports are also available from Polaris Library Systems for a fee. Additional reports by Polaris customers are available for download from the Polaris Customer Extranet. In addition, Polaris SimplyReports software is available by separate purchase. With the Web-based SimplyReports, you can create thousands of custom reports by selecting different combinations of data elements, filters, and sorting options.

  Important:
  Statistical reports in Polaris SimplyReports use the Polaris Transactions database. You must log the transactions on which you want to report (see "Choose the transactions to log" on page 208); otherwise, your statistical reports will be blank or inaccurate. The reports use data generated from the time you chose to begin logging the transactions.

- **SQL queries and the Polaris Transaction Database** - See "Polaris Transactions Database" on page 209.
- **Purging patron identification information** - See "Removing Patron ID Information from Transaction Files" in the *Polaris Patron Services Administration Guide 4.1R2*.

Polaris Transactions Database

The tables in the Polaris Transactions Database provide the information necessary to track and report transactions in Polaris.

If you have basic knowledge of writing SQL queries, you can query the Polaris Transactions Database directly to find more information about transaction types and specific transactions. Using Polaris SimplyReports, you can also construct detailed transaction reports without writing SQL queries. Custom queries and reports are also available from Polaris Library Systems for a fee, and you may find additional queries and reports created by Polaris customers that you can download from the Polaris Customer Extranet. You can also search the database with an SQL query using the Polaris Find Tool. See "Setting Up SQL Searches" in the *Polaris Basics Guide 4.1R2*.

Tip:
See *Database Help* and *Database Changes* at **www.polaristown.com** for detailed information about the Polaris and Polaris Transactions databases. These documents are release-specific.

See the following topics:

- "Querying Transaction Database Tables" on page 210
- "Viewing Specific Transactions" on page 211

Querying Transaction Database Tables

You can run an SQL query to find the same kind of information that you select to include in the Polaris transaction log, using the Transaction Logging database table in Polaris Administration (see "Logging Transactions" on page 207). Run the following query:

Select * From Polaristransactions..TransactionTypes

The important columns in this table are:

- **TransactionTypeID** - Type of transaction
- **TransactionTypeDescription** - Brief description of the TransactionTypeID
- **IsImplemented** - Defines whether Polaris Library Systems has implemented counting this transaction (1=yes, 2=no)

When you search the TransactionTypes table, you may want to order by a particular column. For example, add **Order by TransactionTypeID** to group transactions loosely by subsystem. Or add **Order by IsImplemented** to group all of the transactions that are currently selected to be logged.

The TransactionSubTypes table provides additional details about the transaction type. Run the following query:

Select * From Polaristransactions..TransactionSubTypes

The important columns in this table are:

- **TransactionSubTypeID** - Primary key of the table
- **TransactionSubTypeDescription** - Brief description of the SubTypeID

Each TransactionType has multiple TransactionSubTypes.

ViewTransactions pulls together the information from the TransactionTypes and TransactionSubTypes tables, allowing you to see each type of transaction and the kind of data that Polaris retains. Run the following query:

Select * From Polaristransactions..ViewTransactions

Viewing Specific Transactions

Two tables contain information about specific transactions—TransactionHeaders and TransactionDetails. You will also need to refer to subsequent tables, such as TransactionTypes, TransactionSubTypes, ViewTransactions, and TransactionDetailStrings.

The TransactionHeaders table contains the following basic information about specific transactions:

- **TransactionID** - Unique identifier of the transaction
- **OrganizationID** - Branch ID where the transaction occurred
- **WorkstationID** - Computer ID where the transaction occurred
- **PolarisUserID** - Staff member ID who created the transaction
- **TransactionDate** - Date/time when the transaction is saved to the database
- **TransactionTypeID** - Type of transaction. See the TransactionTypes table.
- **TranClientDate** - Date/time when the transaction was created on the workstation

Note:
The TransactionDate and TranClientDate are usually within milliseconds of each other, but on some occasions they can be different. The TranClientDate is usually more accurate regarding when the transaction was created, unless the date/time is incorrect on the workstation. Make sure that the date/time are correct on your workstations. You can ensure consistency in server and client time settings. See "Ensuring Locale and Time Consistency" on page 191.

The TransactionDetails table contains more details about the specific transaction. The following information is in the TransactionDetails table:

- **TransactionID** - Unique identifier of the transaction
- **TransactionSubTypeID** - Subtype (detail) that goes with the transaction
- **NumValue** - Corresponds to the TransactionSubType. For example, if the **transactionsubtypeid** is 38 (**itemrecordid**), the NumValue displays the specific item record ID. If the **transactionsubtypeid** is 6 (**patronID**), the corresponding NumValue displays the specific patron ID.
- **DateValue** - Date/time that a transaction occurred; currently used only for the subtypes 185 and 186 (CheckIn date and CheckOut date)

Tip:
For certain transactionsubtypes, the value in the NumValue field does not point to a specific record ID. Instead, it points to a value in the TransactionDetailStrings table. The transactiondetailstrings are used especially for PAC search transactions, when the author or title of a book or a branch name is recorded in the transactions database.

To get a full picture of an actual transaction, link the TransactionHeaders and TransactionDetails table using the TransactionID.

Statistical Summary Report

The Statistical Summary report provides detailed snapshots of the system, including database record counts, records added and deleted within a specified time period, and system activity within a specified time period. To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **System** in the Polaris Reports dialog box.

Notes:

For information on generating reports, see "Using Polaris Standard Reports" in the *Polaris Basics Guide 4.1R2*. For information about more detailed circulation reports, see "Circulation Reports" in the *Polaris Patron Services Guide 4.1R2*.

For information on specifying the transactions that should be logged for reports, see "Collecting Transaction Statistics" on page 207.

You can filter the report by date and by organization. The report includes the following categories and details, as well as the totals in each category and the grand total in each category for all selected branches (the sum of individual branches):

Note:
To produce a report that includes all total counts but does not detail individual branch counts, select (check) **Summary only** on the Report Setup dialog box.

Record Counts

These are total counts, not restricted by date range.

- **Bib records with items** - Bibliographic records with at least one item attached, where the record owner is the reporting branch.
- **Bib records without items** - Bibliographic records with no item records attached, where the record owner is the reporting branch.
- **Authority records** - All authority records with a status of Final. Provisional and deleted records are not counted.
- **Item records** - All item records where the assigned branch is the reporting branch. Does not include provisional or deleted records, or items with a circulation status of Withdrawn.
- **Patrons** - All patron records where the registered branch is the reporting branch.
- **Staff** - All staff member records where the staff member organization is the reporting branch.
- **Workstation** - All workstations where the workstation organization is the reporting branch.

Circulation Statistics

These are reported within a specified date range.

- **Check-outs** - All check-out transactions within the specified date range at all workstations where the workstation logon branch for the transaction is the reporting branch. Includes staff client renewals; PAC renewals; inbound telephony renewals; offline check-out; Polaris ExpressCheck check-out and renewals; Quick-circ check-out; SIP, NCIP or remote, third party check-out.

  Note:
  Renewals from PAC are counted as coming from the loaning branch.

- **Borrowers** - Counts all unique patron IDs in check-out transactions within the specified date range at all workstations where the workstation logon branch for the transaction is the reporting branch.
- **Check-in** - All check-in transactions within the specified date range at all workstations where the workstation logon branch for the transaction is the reporting branch. Includes normal mode check-in; bulk mode check-in; offline check-in; in-house circulation; Quick-circ check-in; SIP or remote, third party check-in; any item that is scanned but is already in (in-to-in). Automatic-check-ins (those that occur during check-out or when holds are filled), and inventory check-ins (or Polaris Inventory Manager check-ins) are not counted.
- **Overdue items checked in** - All transactions within the specified date range at all workstations where the workstation logon branch in the transaction is the reporting branch and the transaction indicates the item was overdue. The number of overdue items checked in is included in the count of total check-ins.
- **Holds placed** - Hold statistics are based on the holds transactions. Includes all hold requests where the workstation branch is the reporting branch and the requests have an activation date within the date range. Also includes re-activated requests, requests that have been suspended and re-activated, and requests placed from the PAC. (You can also see a separate count of PAC requests. See “PAC Statistics” on page 215.)
- **Holds satisfied** - All hold requests where the workstation branch is the reporting branch, and the requests have had a status of Held or Transferred with a status date within the date range.
- **Holds cancelled** - All hold requests where the workstation branch is the reporting branch, and that have a request status of Cancelled with a status date within the date range. Includes requests cancelled from the PAC. (You can also see a separate count of PAC cancelled requests. See “PAC Statistics” on page 215.)

Records Added And Deleted

These counts are based on transaction file data within the specified time period.

- **Bib records added** - All bibliographic records created within the date range where Organization ID is the reporting branch.
- **Authority records added** - All authority records created within the date range where Organization ID is the reporting branch.
- **Item records added** - All item records created within the date range where the assigned branch in the item creation transaction is the reporting branch. Includes records with a status of Active or Provisional, but not those with a status of Deleted.
- **Patron records added** - All patron records created within the date range where the Organization ID is the reporting branch. The Organization ID is the patron's registered branch. The report counts all patrons registered for the selected branch, regardless of where the registration occurred, and includes PAC self-registrations. (You can also get a separate count of PAC registrations. See "PAC Statistics" on page 215.)
- **Bib records deleted** - All bibliographic records deleted within the date range where the Organization ID is the reporting branch.
- **Authority records deleted** - All authority records deleted within the date range where the transaction Organization ID is the reporting branch.
- **Item records deleted** - All item records deleted within the date range where the assigned branch is the reporting branch.
- **Item records withdrawn** - This count is not based on transactions, but on the item status and status dates. Includes all item records where the assigned branch of the item is the reporting branch; the item circulation status is Withdrawn; and the circulation status date falls within the selected date range.
- **Patron records deleted** - All patron records deleted within the date range where the patron's registered branch is the reporting branch.

Financial Amounts

These figures summarize monetary transactions within the specified time period.

- **New charges** - All charges created within the date range where the parent branch of the workstation that created the charge is the reporting branch.
- **Money collected** - All amounts paid within the date range where the parent branch of the workstation that took the payment is the reporting branch. Includes full and partial payments, credit card payments, and payments made from PAC and Polaris ExpressCheck. If the workstation branch cannot be determined, the report credits the amount to the organization responsible for the charge.
- **Refunds** - All amounts refunded (refund transactions) within the date range, where the workstation branch of the transaction is the reporting branch. Includes credit card refunds.
- **Net** - Money Collected minus Refunds.
- **Amounts waived** - The sum of all waived amounts within the date range, where the workstation branch is the reporting branch.
- **Outstanding fines** - The total of all charges where the organization identified in the charge (Patron Status workform - Account view) is the reporting branch. This is not all money owed by all patrons registered at the branch, but all money owed to the branch, regardless of who owes it.

PAC Statistics

Note:
When the Statistical Summary report is run for **All** organizations, PAC statistics are based on PAC server activity. If the report is filtered by a specific branch, the report counts only in-library use, based on the PAC workstation login branch.

- **Patron logins** - All logins from PAC within the date range where the patron's registered branch is the reporting branch. The count includes any login; for example, to view the patron account or to place a request.
- **Patron self-registration** - A count of PAC registrations within the date range where the patron's registered branch is the reporting branch. This number is also included in the total number of registrations reported (see "Records Added And Deleted" on page 214).
- **Holds placed from PAC** - All hold requests placed within the date range where the pickup branch is the reporting branch. The total is also included in the Holds Placed count in the Circulation Statistics section.
- **Holds cancelled from PAC** - All hold requests cancelled within the date range where the pickup branch is the reporting branch. The total is also included in the Holds Cancelled count in the Circulation Statistics section.

Note:
Renewals from PAC are included in the Circulation section. They are counted as coming from the loaning branch.

Sending Circulation Statistics to Library Journal

Library Journal collects and compiles statistics about fiction and non-fiction titles borrowed and requested from libraries throughout the United States. The top titles are ranked and listed twice a month in *Library Journal's* "Best Sellers: Books Most Borrowed" feature, available at **www.libraryjournal.com**. A number of Polaris customer libraries contribute to these statistics.

In participating Polaris libraries, circulation and hold request statistics for the library system are sent automatically to Polaris Library Systems on the 1st and 15th of each month. Polaris Library Systems combines the lists from all participating Polaris libraries, totals the number of circulation transactions and holds for the 60 days prior to the list date, sorts the titles by popularity and exports them in a spreadsheet to *Library Journal*. *Library Journal* does not receive, save, or publish statistics associated with each specific library that supplies statistics to Polaris Library Systems.

You can control whether your system participates in the *Library Journal* feature through a Polaris Administration setting. At the system level, double-click the Patron Services profile **Contribute to LJ Books Most Borrowed** and select an option:

- **No - Opt out** - Select this option if you do not want to participate.
- **Yes - Via Web Service** - *Default*. Select this option to participate. The job gathers the statistics and transmits them automatically to Polaris Library Systems.
- **Yes - Via FTP** - Future functionality. Do not use.

If **Yes** is selected, your statistics are automatically sent to Polaris Library Systems for processing on the 15th and 30th of each month. You do not need to do anything else to participate.

Defining Barcode Formats

You can set Polaris to distinguish between patron and item barcodes, so that if you scan or type a barcode that is the incorrect type for a barcode field, Polaris displays a warning message. Permission is required to continue to save a record with an invalid barcode. You can define several barcode types for each usage, and specify a default format for patron barcodes.

Example:
Based on your settings, if a barcode designated for patrons is entered in the **Barcode** box on the Item Record workform, or if an item barcode was scanned in the **Patron** box on the Check Out workform, the staff client displays a warning message.

Polaris checks the barcode value for prefix numbers and barcode length to identify its type and usage. However, Polaris does not check for incomplete scans or check digits. Barcode validity checks are usually done by the scanner software and equipment.

Note:
If a record exists that uses the entered barcode value, the barcode is accepted, even though the barcode may not use a valid definition. It is not always practical to fix a barcode problem during operations where the patron is being served.

See the following topics:

- "Barcode Formats" on page 218
- "Define an item barcode format" on page 221
- "Define a patron barcode format" on page 222
- "Set up significant digits for patron barcodes" on page 223
- "Delete a barcode format" on page 224
- "Saving Records with Invalid Barcodes" on page 225

Barcode Formats

A barcode format definition sets the total number of characters in the barcode, including the initial (prefix) characters. The maximum is 20 characters. The prefix characters can be any character or characters—numbers, letters, or special characters, except the asterisk. The asterisk (*) indicates that any character or length is accepted in the definition. For example, if the barcode prefix is more than one character, the asterisk serves as a wildcard character. This is especially useful if the barcode format includes a check digit or start digit at the beginning of the barcode. For example, a prefix of ***3** means the barcode prefix can start with any character, but the second position of the barcode must be a **3** to be valid.

If you specify just an asterisk for both the prefix and the total length, this means that a barcode may be any length and any prefix. This definition essentially turns off barcode verification for that usage, so any barcode is accepted for the operation. The undefined format is the default setting for both patron and item barcodes.

> **Important:**
> If you define barcode formats instead of accepting the default (undefined) setting, Polaris displays more consistent messages when you define *both* item and patron barcode formats.

Barcode types can be defined at system, library, and branch levels. Each branch may specify different barcode types for items and patrons. You can define multiple valid formats for both items and patrons, and add and remove definitions as necessary.

- If the same barcode types are used by all organizations in the Polaris installation, then you need only define barcode types at the system level.
- If different barcode types are used in each organization, define all the types for each library and branch to accommodate cross-borrowing.

> **Note:**
> Interlibrary loan items may have barcodes that are invalid in your system. You can choose to use the existing barcode or attach a slip with a valid barcode.

See the following topics:

- "Significant Digits in Patron Barcodes" on page 219
- "Define an item barcode format" on page 221
- "Define a patron barcode format" on page 222
- "Set up significant digits for patron barcodes" on page 223
- "Delete a barcode format" on page 224

Significant Digits in Patron Barcodes

If all your patron barcodes begin with the same prefix, and only the final portion of the barcode is unique to each patron, you can set Polaris to treat the final portion as significant digits. You set the prefix and total length as the default patron barcode format in Polaris Administration. Then, staff can enter just the significant digits in a patron barcode field, and patrons can enter just the significant digits to log on at the PAC. The system automatically supplies the prefix whenever the user enters significant digits. Also, staff and patrons can omit leading zeros when they enter the significant digits.

Example:
The default barcode format specifies a prefix of 32214, and a length of 14 digits. A patron's barcode is 32214000006871. There are nine significant digits (000006871), but you can enter 6871 because the system adds the leading zeros.

When the significant digits are entered in a patron barcode field, a record is considered a match in these circumstances:

- The significant digits added to your defined prefix match the complete barcode in a patron record.
- If fewer than the defined number of significant digits are entered, the system adds leading zeros to the defined number of significant digits, and the complete barcode matches the barcode in a patron record.

  Important:
  If your database includes existing patron barcodes with fewer digits than the significant digits defined by the default patron barcode format, you may encounter some problems. Because the leading zeros and prefix are automatically appended, patrons with the "short" barcodes cannot log on in PAC, and staff client workforms such as the Check Out workform do not find them. However, for trouble-shooting purposes, you can search for and open these records from the Patron Record Find Tool (Name or Barcode, Exact match). From the Patron Registration workform, you can change the barcode, or perform operations such as check out.

- If more than the defined number of significant digits are entered, and the digits match an entire patron barcode of the same length, the record is considered a match. This is the situation when you scan a complete barcode.

When you set a default patron barcode format in Polaris Administration, the following functions are affected:

- **Patron Find Tool** (search by **Barcode**) - The Find Tool includes **Significant Digits** as a search **Type** option. When you select this search type, you can search for just the significant digits. Leading zeros are added as necessary, and the complete barcode appears in the **For** field. (If you select **Significant Digits** as the search type but enter more than the default number of digits, the search is not likely to yield any results.)

  Note:
  When a patron registers online in the PAC, the system assigns a temporary barcode that begins with **PACREG**, and creates a new patron record with a Verify Patron block. Significant digits do not affect this functionality. In the staff client, you can search for the new record by the entire exact barcode beginning with **PACREG**, or use the wildcard **PACREG***. You cannot search for a **PACREG** barcode using significant digits.

- **Check Out workform** - Leading zeros are added as necessary. When a match is found, the complete barcode is displayed.
- **Offline Check Out workform** - Leading zeros are added as necessary. The complete barcode is displayed and stored. When the offline file is uploaded, the system finds a matching patron record based on the complete barcode.
- **Patron Registration workform** - Significant digits can be entered into the patron record when the record is created or edited. The system supplies the complete barcode, including any leading zeros, and the complete barcode displays in the patron record. If you enter more than the defined number of significant digits, the system attempts to save the record with the digits you entered as the complete barcode.
- **Offline patron registration** - The complete barcode is displayed and saved when the offline file is uploaded.
- **Hold Request workform** (placing a new request) - Leading zeros are added as necessary. When a match is found, the complete barcode is displayed.
- **Patron Record Set** (add by scanning) - To add a patron record to a record set, enter significant digits in the **Barcode** text box of the Scan Barcode dialog box. The system supplies leading zeros, if necessary, and the matching process is the same as in other functions.
- **PAC log-on** - The patron can enter significant digits to log on. The system supplies leading zeros, if necessary, and the matching process is the same as in the staff client. If a matching record is found, the patron log-on continues. If more than the significant digits are entered, and the digits match a *complete* barcode, the patron log-on continues. After a successful log-on, the log-on page and the patron account page display the complete barcode.

  Note:
  When a patron registers online in the PAC, the system assigns a temporary barcode that begins with **PACREG**, and creates a new patron record with a Verify Patron block. Significant digits do not affect this functionality. The patron must enter the entire **PACREG** barcode until the permanent barcode is assigned.

- **Inbound telephony** - The caller can enter the significant digits when prompted to enter the barcode. The system supplies leading zeros, if necessary, and the matching process is the same as in other functions. However, if a duplicate is found, the system responds with a message to contact the library for assistance, and the process stops.

The following functions are not affected by the default patron barcode setting:

- **Polaris ExpressCheck** - Significant digit functionality does not affect Polaris ExpressCheck functions because barcodes are always entered by scanning.
- **Third-party authentication, SIP, NCIP** - The entire barcode is communicated in these functions.

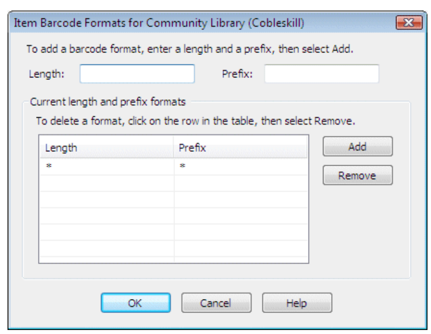
For instructions, see "Set up significant digits for patron barcodes" on page 223.

Define an item barcode format

Follow these steps to define an item barcode.

> **Note:**
> To produce more consistent barcode messages in Polaris, define *both* item and patron barcodes.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Staff Client** tab in the details view.
2. Double-click **Barcodes: Item format definition**.



3. In the **Length** box, specify the total number of characters required in the barcode, including the prefix:
   - To require a specific number of characters, type a number from 1 to 20.
   - Type ***** if the barcode can be any length.
4. Type, in the **Prefix** box, the characters that can begin a valid barcode:
   - Type any character or sequence of characters that uniquely identifies the barcode type.
   - Type ***** to accept any character as the prefix.

5. Click **Add** to put the definition in the **Current Formats** list.
6. Repeat steps 3-5 for every barcode format used for items.
7. Click **OK**.

   The Item Barcode Formats dialog box closes.

Related Information

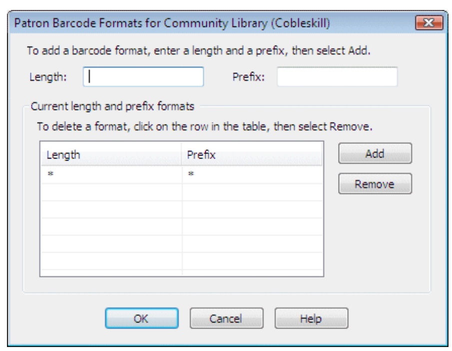
- **Defining patron barcode formats** - See "Define a patron barcode format" on page 222.
- **Significant digits in patron barcodes** - You can specify a default patron barcode format to use in defining significant digits. Staff and patrons can enter just the significant digits in a barcode field, and the system supplies the prefix. See "Significant Digits in Patron Barcodes" on page 219.

Define a patron barcode format

Follow these steps to define a patron barcode format.

> **Note:**
> To produce more consistent barcode messages in Polaris, define *both* item and patron barcodes.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Staff Client** tab in the details view.
2. Double-click **Barcodes: Patron format definition**.



3. In the **Length** box, specify the total number of characters required in the barcode, including the prefix:
   - To require a specific number of characters, type a number from 1 to 20.
   - Type ***** if the barcode can be any length.
4. Type, in the **Prefix** box, the characters that can begin a valid barcode:
   - Type any character or sequence of characters that uniquely identifies the barcode type.
   - Type ***** to accept any character as the prefix.

Note:
At the system level, you can define a prefix and length combination to set as the default format. See "Set up significant digits for patron barcodes" on page 223.

5. Click **Add** to put the definition in the **Current Formats** list.
6. Repeat steps 3-5 for every barcode format used for the type.
7. Click **OK**.

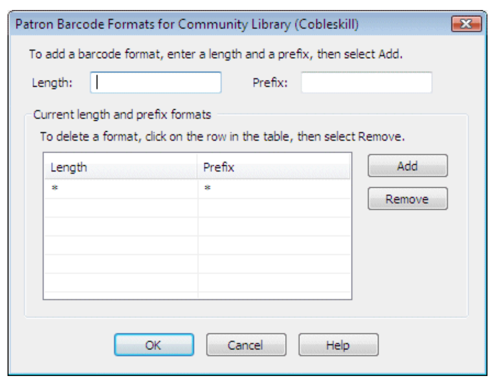
   The Patron Barcode Formats dialog box closes.

Set up significant digits for patron barcodes

A single patron barcode format can be selected at the system level for significant digit use. You specify the prefix and the length, then designate this format as the default. Your settings apply to all organizations in the system. For details about how this setting affects the staff client and the PAC, see "Significant Digits in Patron Barcodes" on page 219. Follow these steps to set a default patron barcode for significant digit use.

1. In the Administration Explorer tree view, open the **Profiles** folder for the system, and select the **Staff Client** tab in the details view.
2. Double-click **Barcodes: Patron format definition**.

   The Patron Barcode Formats dialog box appears.



3. In the **Length** box, type the total number of characters (1-20) required in the barcode, including the prefix.

   You cannot leave this field undefined (*) for a barcode that will be specified as the default. You must type a number.
4. In the **Prefix** box, type the characters that begin the barcode.

   You cannot leave this field undefined (*) for a barcode that will be specified as the default. You must type a character or sequence of characters. When significant digits are entered for a patron barcode, the system appends this prefix to form the complete barcode.
5. Click **Add** to put the definition in the **Current length and prefix formats** list.

6. Select the new definition in the **Current length and prefix formats** list, and click **Default On/Off**.

   The **Default** column displays asterisks (*******) to indicate that this barcode is used as the default, for significant digit purposes. (To remove the default designation, select the default barcode and click **Default On/Off**.)

   > **Note:**
   > **Default On/Off** is available only at the system level because the setting applies to all organizations. Even if the default format is removed from the Patron Barcode Formats dialog box at the branch level, the default format is still in effect because it is defined at the system level.

   When you change the default, a warning message appears. If your database includes existing patron barcodes with fewer digits than the significant digits defined by the default patron barcode format, you may encounter some problems. Because the leading zeros and prefix are automatically appended, patrons with the "short" barcodes cannot log on in PAC, and staff client workforms such as the Check Out workform do not find them. However, for trouble-shooting purposes, you can search for and open these records from the Patron Record Find Tool (Name or Barcode, Exact match) and change the barcode, or perform operations such as check out from the Patron Registration workform.

7. Click **OK** on the message box.
8. Click **OK** to save your settings.

Delete a barcode format

Follow these steps to remove a patron or item barcode format definition.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Staff Client** tab in the details view.
2. Display the appropriate Barcode Formats dialog box using one of the following methods:
   - Double-click **Barcodes: Patron format definition**.
   - Double-click **Barcodes: Item format definition**.
3. Click (highlight) the definition to delete in the **Current Formats** list.
4. Click **Remove** to delete the selected definition.

   The **Delete this barcode format** message box appears.

5. Click **Yes** to confirm that you want to delete the selected definition.

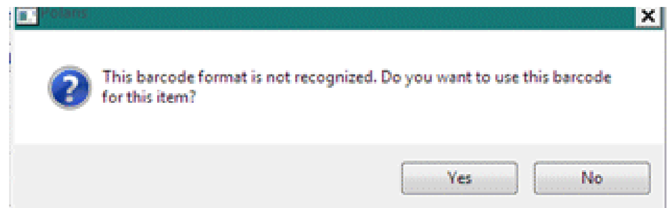
   The Barcode Formats dialog box appears.

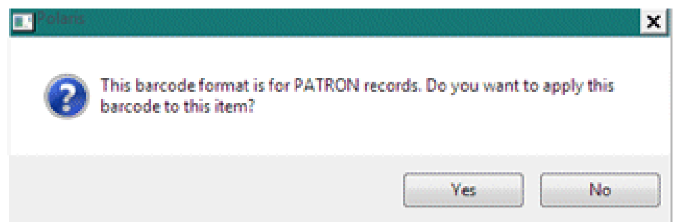
6. Click **OK** on the Barcode Formats dialog box.

   > **Important:**
   > For patron barcodes, **Default On/Off** is available only at the system level because the setting applies to all organizations. Even if the default format is removed from the Patron Barcode Formats dialog box at the branch level, the default format defined at the system level is still in effect.

Saving Records with Invalid Barcodes

When a staff member attempts to save an item or patron record with an invalid barcode, the staff member receives an invalid barcode message. Barcode validity is also checked for serial item records generated when serials are checked in or created from the issue record. Examples of invalid barcode messages for item records are illustrated below:





Staff members with the following permissions can continue to save the record:

- **Override invalid item barcode message: Allow** (system-level Cataloging permission)

  Note:
  This permission also controls the ability to generate or create a serial item record with an invalid item barcode.

- **Override invalid patron barcode message: Allow** (system-level Circulation permission)

  Note:
  These permissions are not checked for the following records and operations:

  -- Saving ILL items
  -- Saving course reserve items
  -- System-created "PACREG" temporary patron barcodes (created when a patron registers from PAC)
  -- Generating on-order or in-process items

When the appropriate permission is set to **No** and the staff member clicks **Yes** on the invalid barcode message to continue to the save the record, a permission block message is displayed.

An authorized staff member must supply a valid username, password, and domain, then click **Override** to allow the record to be saved with the invalid barcode.

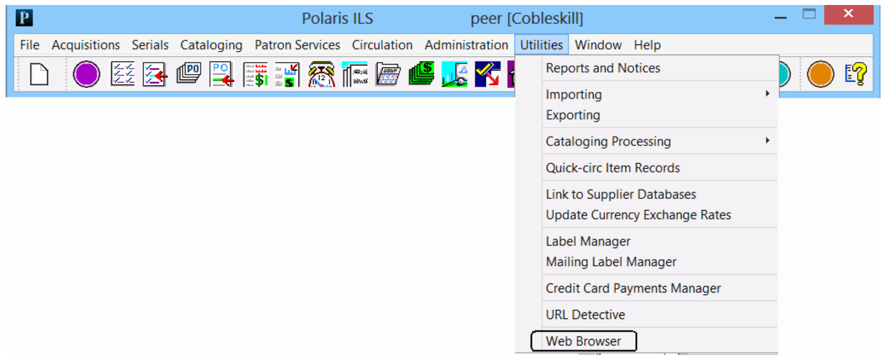
At upgrade to Polaris 4.1R2 the permissions are set to **Yes** by default. If you prefer to assign the permissions only to selected staff members, set the system level Staff Client profile **Permissions: Use Polaris-defined new permission defaults** to **No** before upgrading to Polaris 4.1R2.

Related Information

- **Defining valid barcode formats** - “Barcode Formats” on page 218
- **Setting permissions** - “Granting Permissions” on page 106
- **Overriding permission blocks** - “Encountering Permission Blocks” in the *Polaris Basics Guide 4.1R2*

Setting a Default Web Page

The Utilities menu on the Polaris Shortcut Bar includes the option **Web Browser**.



By default, the Polaris Library Systems Web page appears when a staff member selects **Web Browser**. However, you can specify a different default Web page, or make the option unavailable by specifying no default page.

See the following topic:

- "Specify a default Web page for Web Browser option" on page 227

Specify a default Web page for Web Browser option

Follow these steps to specify the Web page that appears when a staff member selects **Utilities, Web Browser** on the Polaris Shortcut Bar.

> **Note:**
> You can specify the default Web page on the system, library, or branch level. The system uses the setting in effect for the user's logged-in branch.

1. In the Administration Explorer tree view, open **Profiles** for the organization, and select the **Staff Client** tab.
2. Double-click **Utilities: Web browser default URL**.
3. Type the Web address for the default Web page (maximum 255 characters).

   The Web address must begin with **http://**.

   If no address is specified in the profile, the **Web Browser** option is unavailable (gray) on the Utilities menu of the Polaris Shortcut Bar.
4. Select **File, Save.**

> **Note:**
> To see the effects of your changes in the staff client, exit the staff client and log back in.

Defining Online Documentation

The Help menu on the Polaris Shortcut Bar includes the option **Online Documents**. By default, an index page to Polaris user guides in .pdf format appears when you select **Online Documents**. However, you can change the default so that a specific document always appears. Each staff workstation may display the online document that applies to the tasks done at the workstation.

The Help menu also includes the option **Library Documentation**. You can set a path and filename or URL for this option to display your own documentation.

Note:
For information about setting PAC help, see "Polaris PowerPAC Help" in the *Polaris Public Access Administration Guide 4.1R2*.

See the following topic:

- "Specify the location of online documents" on page 228

Specify the location of online documents

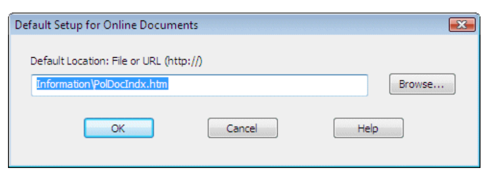
Follow these steps to specify the documentation accessible from the Polaris staff client.

1. In the Administration Explorer tree view, open **Profiles** for the organization or workstation, and select the **Staff Client** tab.

   Note:
   See "List workstations in the Explorer" on page 89.

2. Double-click **Online documents location**.

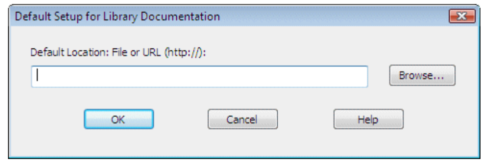
   The Default Setup for Online Documents dialog box appears.



3. Specify the location of the documentation you want to make accessible by one of the following methods:
   - Click **Browse** to select the location of the file.
   - In the **Default Directory** box, type a URL, beginning with **http://**.
4. Click **OK** on the dialog box.
5. To supply custom information for the **Library Documentation** option on the Help menu, double-click **Library documentation - staff client**.

Tip:
The default path to the documents delivered with the Polaris software is: **polaris\Information\PolDocIndx.htm**, on the Polaris Application server. The default .htm file is a page with links to the Polaris Library Systems guides for Polaris in .pdf format.

The Default Setup for Library Documentation dialog box appears.



6. Specify the location of the information you want to make accessible by one of the following methods:
   - Click **Browse** to select the location of the file.
   - In the **Default Directory** box, type a URL, beginning with **http://**.

7. Click **OK** on the dialog box.

   Note:
   To see the effects of your changes in the staff client, exit the staff client and log back in.

Setting Up Computype Label Printers

These instructions are for Zebra printers with the Computype LabelMorphor IIE, models:

- T402
- TLP 3844Z
- Z4M Plus
- ZM400
- GX420T
- GX430T

One of the following versions of the Computype firmware has to be loaded on the LabelMorphor:

- Polaris_v1.c
- Polaris_v2.c
- Polaris_v3.c
- Polaris_v4.c

The printer command is entered in the Computype Label Printer Commands database table in Polaris Administration. To find the command, go to the printer properties.

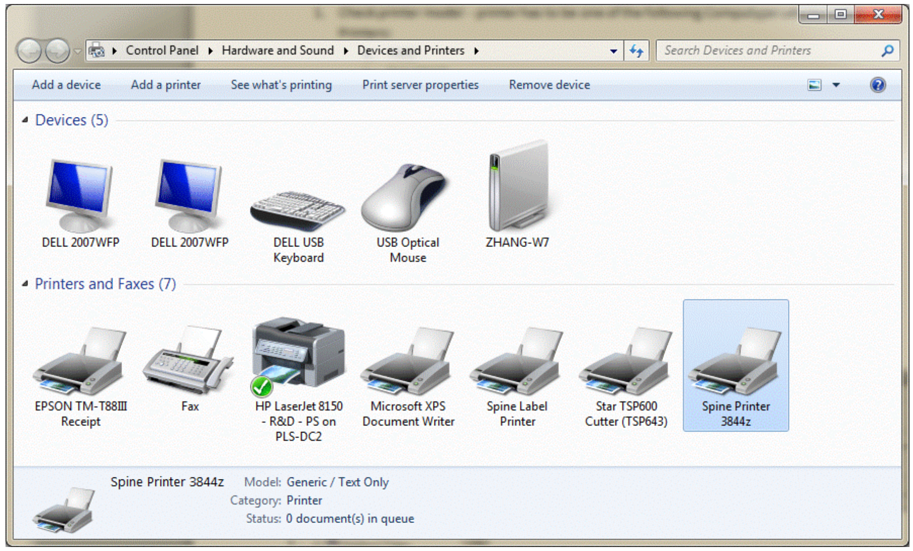
See the following topics:

- “Find Computype printer commands” on page 231
- “Enter a Computype printer command” on page 232

Find Computype printer commands

Follow these steps to locate the Computype printer command to enter in the database table.

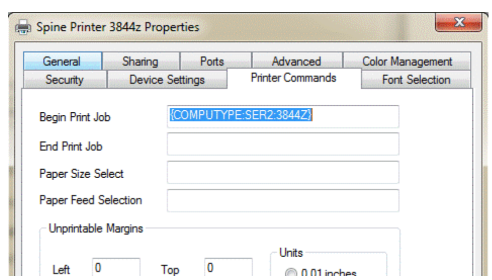
1. Go to the Control Panel on the computer.
2. Select **Hardware and Sound, Devices and Printers** to see the printers.



3. Select the Computype spine printer, right-click and select **Properties**.

   The Properties window opens.

4. Select the Printer Commands tab.



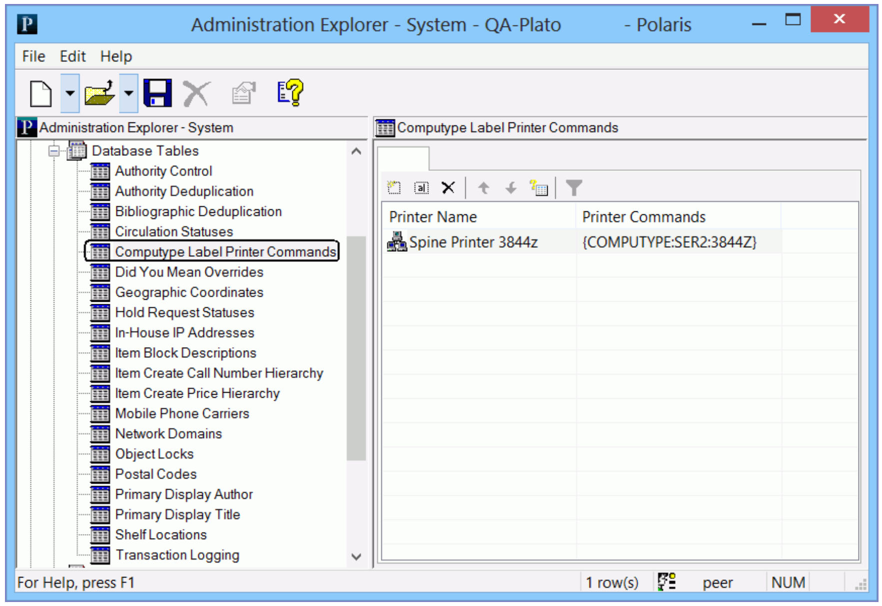
5. Select and copy the text in the **Begin Print Job** box. This is the printer command that is entered in Polaris Administration.

   Enter the printer name and command code in the Computype Label Printer Commands database table in Polaris Administration. See "Enter a Computype printer command" on page 232.

Enter a Computype printer command

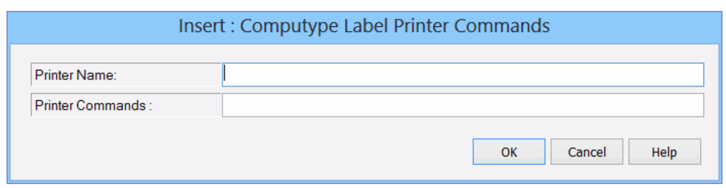
Follow these steps to enter a Computype printer command.

1. In the Administration Explorer tree view, select the system or organization, and select **Database tables**.
2. Double-click **Computype Label Printer Commands** to open the table.



3. Click  to insert the command.

   The Insert: Computype Label Printer Commands dialog box opens.



4. Enter the printer name in the **Printer Name** box.
5. Paste or enter the printer command in the **Printer Commands** box.

   Note:
   To locate and copy the printer command, see "Find Computype printer commands" on page 231.

6. Click **OK**.

System Administration Permissions Reference

These permissions are available under **Security**, **System Administration** on the Administration Explorer, at the listed organizational levels. Polaris Administrators typically require these permissions. However, other staff members may require access to specific tables. For example, senior catalogers may require permissions related to MARC validation profiles.

Note:
For more information about setting system administration permissions, including the combinations of permissions needed for specific workflows, see “Setting Administration Permissions” on page 140. For general information about setting permissions in Polaris, see “Granting Permissions” on page 106.

Access administration (System)

Administer Polaris.

- **Allow**: Open and use the Administration menu on the Polaris Shortcut Bar.

Access logon branch (System)

Log on to branches other than those with which the user name is associated.

- **Allow**: Log on to branches other than the “Home” branch; often used for rotating staff. See “Special Permissions for Rotating Staff” on page 111. You must also set **Logon branch** (Access) at the branch level to allow access to specific branches at log-on.

Access MARC Re-indexing during next server upgrade (System)

Set the system-level Cataloging parameter MARC **MARC Re-index during next server upgrade** to **Yes.** When the server upgrade is complete, the parameter is automatically reset to **No**.

Access MARC Validation: Authority (System)

Access the MARC Validation: Authority Cataloging administration profile.

- **Allow**: Open the MARC Validation: Authority profile.

Access MARC Validation: Bibliographic (System)

Access the MARC Validation: Bibliographic Cataloging administration profile.

- **Allow**: Open the MARC Validation: Authority profile.

Access reports and notices (System)

Generate reports; generate overdue, holds, fine, and other notices.

- **Allow**: Use the Polaris Reports Manager. This permission makes the **Utilities, Reports and Notices** option available from the Polaris Shortcut Bar.

Access search agent reports (System)

Not used.

Access tables (System)
Review and change database and policy tables in Polaris Administration.

- **Allow**: View the database and policy tables in the Administration Explorer and organization workforms.

Branches (System)
Work with branch administration records.

- **Access**: List and view the branch administration records. Needed to search for branches and open the **Branch** folder in the Administration Explorer.
- **Create**: Create a new branch in Polaris.
- **Modify**: Maintain branch administration records.

Collections (System)
Work with collection records.

- **Access**: List and view the collection administration records. Needed to search for collections with the Find Tool, and open the **Collections** folder in the Administration Explorer.
- **Create**: Create new collections in Polaris.
- **Modify**: Maintain collection administration records.
- **Delete**: Delete collection administration records from Polaris.

Libraries (System)
Work with library (organization level) administration records.

- **Access**: List and view library administration records. Needed to search for library administration records with the Find Tool, and open the **Library** folder in the Administration Explorer.
- **Create**: Create a new library record in Polaris.
- **Modify**: Maintain the library administration records.

Logon branch (Branch)
Log on to this branch and use the branch's settings, even though user name is not associated with the branch.

- **Access**: Log on to this branch even though the staff member is not registered with the branch; often used for rotating staff. See "Special Permissions for Rotating Staff" on page 111. You must also set **Access logon branch** (Allow) at the system level.

MARC Validation: Authority - delete row (System)
Delete validation rules for locally-defined MARC authority tags. All organizations use the settings in this Cataloging profile (**MARC Validation: Authority**).

- **Allow**: Use the Delete button on the MARC Validation Editor dialog box for authority validation rules.

MARC Validation: Authority - insert row (System)
Add rules to validate locally-defined MARC authority tags. All organizations use the settings in this Cataloging profile (**MARC Validation: Authority**).

- **Allow**: Insert authority validation rules in the MARC Validation Editor dialog box.

MARC Validation: Authority - modify row (System)	Change existing MARC authority validation rules. All organizations use the settings in this Cataloging profile (**MARC Validation: Authority**). • **Allow**: Edit the settings for the authority validation rules in the MARC Validation Editor.
MARC Validation: Bibliographic - delete row (System)	Delete validation rules for locally-defined bibliographic tags. All organizations use the settings in this Cataloging profile (**MARC Validation: Bibliographic**). • **Allow**: Use the Delete button on the MARC Validation Editor dialog box for bibliographic validation rules.
MARC Validation: Bibliographic - insert row (System)	Add rules to validate locally-defined MARC bibliographic tags. All organizations use the settings in this Cataloging profile (**MARC Validation: Bibliographic**) • **Allow**: Insert bibliographic validation rules in the MARC Validation Editor dialog box.
MARC Validation: Bibliographic - modify row (System)	Change existing MARC bibliographic validation rules. All organizations use the settings in this Cataloging profile (**MARC Validation: Bibliographic**) • **Allow**: Edit the settings for the bibliographic validation rules in the MARC Validation Editor.
Modify address table (System)	Maintain organization addresses. All organizations use the settings in this table. • **Allow**: Add and delete entries in the Addresses policy table. Change entries in the table.
Modify and create display entities (System)	Controls access to the Entities Definition dialog box, launched from the Title Display Configure or Community Information Configure dialog boxes. • **Allow**: Edit existing display elements (entities) or define custom entities (bibliographic entities only) for PAC search results displays.
Modify authority control table (System)	*Future functionality*. Do not assign.
Modify authority deduplication table (System)	Determine the rules for identifying duplicate authority records when authority records are imported. All organizations use the settings in this table. • **Allow**: Add and delete entries in the Authority Deduplication policy table. Change individual entries in the table.
Modify authority overlay retention table (System)	Identify the authority tags that must be transferred to overlayer records. All organizations use the settings in this table. • **Allow**: Add and delete entries in the Authority Overlay Retention table. Changes to individual entries in the table.

Modify authority record import: preferred cataloging source (System)	Identify preferred cataloging sources for imported authority records. All organizations use the settings in this table. • **Allow**: Add and delete entries in the Authority Record Import: Preferred Cataloging Source table. Change individual entries in the table.
Modify bibliographic deduplication table (System)	Set the rules that Polaris uses to determine duplicate bibliographic records. All organizations use the settings in this table. • **Allow**: Add and delete entries in the Bibliographic Deduplication database table. Change individual entries in the table.
Modify bibliographic record title displays (System)	Select bibliographic entities for display in PAC search results views; set display order; edit labels; create and edit entity definitions. • **Allow**: Access and work with the dialog boxes opened from the PowerPAC profile **Title Display: Configure** and Mobile PAC profile **Title Display: Configure.**
Modify bibliographic tags to retain/delete table (System)	Identify the tags to be transferred to overlayer records when records are imported, and identify tags to delete from incoming records. All organizations use the settings in this table. • **Allow**: Add and delete entries in the Bibliographic Tags to Retain/ Delete table. Change individual entries in the table.
Modify call number hierarchy table (System)	Identify the bibliographic record tags that contain the call number and the precedence in which the tags are checked for the call number. All organizations use the settings in this table. • **Allow**: Change individual entries in the Call Number hierarchy database table.
Modify circulation status table (System)	Modify the display descriptions of the standard item circulation statuses. • **Allow**: Modify descriptions for individual entries in the Circulation Statuses database table.
Modify claim reason table (System)	Define the standard reasons a claim is filed with a supplier. All organizations use the settings in this table. • **Allow**: Add and delete entries in the Claim Reasons policy table. Change individual entries in the table.
Modify community record title displays (System)	Select community information entities for display in PAC search results views; set display order; edit labels; edit entity definitions. • **Allow**: Access and work with the dialog boxes opened from the Community profiles **Community Information Display (PowerPAC): Configure** and **Community Information Display (Mobile PAC): Configure.**
Modify computype label printer commands table (System)	Enter or modify Computype label printer commands. • **Allow**: Access and work with the Computype Label Printer Commands database table.

Modify contact persons table (System)

Maintain the list of staff members who can be listed on notices and reminders. All organizations use the settings in this table.

- **Allow**: Add and delete entries in the Contact Persons policy table. Change individual entries in the table.

Modify countries table (System)

Maintain the standard postal code formats used in records with addresses. All organizations use the settings in this table.

- **Allow**: Add entries and change individual entries in the Countries policy table. (You cannot delete postal code format entries using the Polaris Administration user interface.)

Modify course reserve tables (System)

Maintain the options available for course reserve records.

- **Allow**: Add, modify, and delete entries in the course reserves policy tables (Course Reserves: Courses, Course Reserves: Schools/Divisions, Course Reserves: Departments, Course Reserves: Course terms). These entries define the options available in the course reserve record workform.

Modify cross reference display constants table (System)

Specify how heading cross-references are displayed for browse searches in the public catalog. All organizations use the settings in this table.

- **Allow**: Change individual entries in the Cross Reference Display Constants table. You cannot add or delete cross-reference label entries using the Polaris Administration user interface.

Modify currencies table (System)

Specify the currencies (such as US or Canadian dollars) that can be used in Acquisitions records. All organizations use the settings in this table.

- **Allow**: Add, enable, disable, and delete entries in the Currencies policy table. See "Administering Foreign Currencies" in the *Polaris Acquisitions Guide 4.1R2*.

Modify dates closed table (System)

Maintain the list of dates when branches are closed. All organizations use the settings in this table.

- **Allow**: Add and delete entries in the Dates Closed policy table. Change individual entries in the table.

Modify did you mean overrides table (System)

Maintain a list of override suggestions for the Did You Mean function in the PAC. See "Setting Up Did You Mean Term Checking" in the *Polaris Public Access Administration Guide 4.1R2*.

- **Allow**: Add and delete entries in the Did You Mean Overrides database table. Change individual entries in the table.

Modify donation fund category table (System)

Maintain the list of standard fund categories. All organizations use the settings in this table.

- **Allow**: Add and delete entries in the Fund Categories policy table. Change individual entries in the table.

Modify fee descriptions table (System)

Maintain the list of standard fee descriptions. All organizations use the settings in this table.

- **Allow**: Add entries and change individual entries in the Fee Descriptions policy table. (You cannot delete fee description entries using the Polaris Administration user interface.)

Modify fine codes table (System)

Maintain the list of standard fine categories. All organizations use the settings in this table.

- **Allow**: Add entries and change individual entries in the Fine Codes policy table. (You cannot delete fine category entries using the Polaris Administration user interface.)

Modify fines table (System)

Maintain the fines rate schedule. All organizations use the settings in this table.

- **Allow**: Add entries and change individual entries in the Fine policy table. (You cannot delete fine category entries using the Polaris Administration user interface.)

Modify floating material type limits table (System)

Determine how many floating items of a specific material type a receiving branch will accept. See “Setting Up Floating Collections” in the *Polaris Patron Services Administration Guide 4.1R2*.

- **Allow**: Set the limits for In items and total items.

Modify floating material types table (System)

Determine which material types should or should not float from a home branch. See “Setting Up Floating Collections” in the *Polaris Patron Services Administration Guide 4.1R2*.

- **Allow**: Set material types to **Yes** or **No** for floating.

Modify floating to branch table (System)

Specify the receiving branches for a home branch’s floating collections. See “Setting Up Floating Collections” in the *Polaris Patron Services Administration Guide 4.1R2*.

- **Allow**: Select and de-select receiving branches.

Modify geographic coordinates table (System)

Specify the latitude and longitude of organizations that should be displayed with the Map It (Google Maps) feature in Polaris PowerPAC. See “Map It (Google Maps) in PAC” in the *Polaris Public Access Administration Guide 4.1R2*.

- **Allow**: Add, edit, and delete coordinates.

Modify hold status table (System)

Edit the hold request status descriptions that are displayed in the staff client and PAC patron account. See “Specifying Hold Status Descriptions” in the *Polaris Patron Services Administration Guide 4.1R2*.

- **Allow**: Select a hold request status in the Hold Request Statuses database table and edit the corresponding description.

Modify holds routing sequence table (System)	Set up the route sequences for hold requests. All organizations use the settings in this table. • **Allow**: Add, delete, and reorder entries in the Holds Routing Sequences policy table. Change individual entries.
Modify import blackout times (System)	Set the times when import processing cannot be done, using the Cataloging profile **Import blackout times**. See "Managing Importing" in the *Polaris Cataloging Guide 4.1R2*.
Modify initial articles table (System)	Maintain the list of leading articles to ignore in searches. All organizations use the settings in this table. • **Allow**: Add and delete entries in the Initial Articles policy table. Change individual entries in the table.
Modify item availability display order table (System)	Determine how item availability is displayed in the public catalog. All organizations use the settings in this table. • **Allow**: Add, delete, and reorder entries in the Item Availability Display Order policy table. Change individual entries.
Modify item block descriptions table (System)	Maintain the standard list of item blocks. All organizations use the settings in this table. • **Allow**: Add and delete entries in the Item Block Descriptions database table. Change individual entries in the table.
Modify item price hierarchy table (System)	Maintain the database table that specifies which fields are checked, and in which order, when copying the price from bibliographic records to their linked item records. Each organization can have its own settings in this table. • **Allow**: Add and delete entries in the Item Create Price Hierarchy database table. Change individual entries in the table.
Modify item statistical class codes table (System)	Maintain the standard list of item statistical classifications. All organizations use the settings in this table. • **Allow**: Add entries and change individual entries in the Item Statistical Class Codes policy table. (You cannot delete statistical classification entries using the Polaris Administration user interface.)
Modify links to supplier databases (System)	Maintain the standard list of supplier databases that appear as options in the **Select a supplier database** box (on the Link to Supplier Databases dialog box). All organizations use the settings in this table. • **Allow**: Add and delete entries in the Link to Supplier Databases policy table. Change individual entries in the table.
Modify loan period codes table (System)	Define the descriptions for loan period codes. All organizations use the settings in this table. • **Allow**: Add entries and change individual entries in the Loan Period Codes policy table. (You cannot delete loan period description entries using the Polaris Administration user interface.)

Modify loan periods table (System)

Specify loan period durations. All organizations use the settings in this table.

- **Allow**: Add entries and change individual entries in the Loan Periods policy table. (You cannot delete loan period duration entries using the Polaris Administration user interface.)

Modify MARC language scoping display table (System)

Specify the languages available for scoping searches. All organizations use the settings in this table.

- **Allow**: Add, delete, and reorder entries in the MARC Language Scoping Display policy table. Change individual entries in the table.

Modify material types table (System)

Define the standard list of item material types. All organizations use the settings in this table.

- **Allow**: Add, delete, and reorder entries in the Material Types policy table. Changes individual entries in the table.

Modify NCIP Medium Types Incoming table (System)

Map NCIP Medium to Polaris item material types for incoming requests; used for requests where the Polaris library is the borrower.

- **Allow**: Modify entries in the NCIP Medium Types Incoming policy table.

Modify NCIP Medium Types Outgoing table (System)

Map the library's Polaris item material types to NCIP medium types; used for requests where the Polaris library is the lender.

- **Allow**: Modify entries in the NCIP Medium Types Outgoing policy table.

Modify NCIP User Privilege Types table (System)

Map Polaris patron codes to NCIP standard public and/or academic user privilege types.

- **Allow**: Modify entries in the NCIP User Privilege Types policy table.

Modify network domains table (System)

For multi-domain networks. Specify NetBIOS Name and DNSName for each domain in your network

- **Allow**: Add, delete, and modify entries in the Network Domains table.

Modify notification dates not to call table (System)

Maintain the list of dates when the phone notification server should not make calls.

- **Allow**: Add, delete, and reorder entries in the Notification Dates Not to Call table. Change individual entries in the table.

Modify notification local area codes table (System)

Maintain the list of local-call area codes for phone notification purposes.

- **Allow**: Add, delete, and reorder entries in the Notification Local Area codes table. Change individual entries in the table.

Modify notification local prefix table (System)

Maintain the list of local-call prefixes for phone notification purposes.

- **Allow**: Add, delete, and reorder entries in the Notification Local prefix table. Change individual entries in the table.

Modify object locks table (System)	Remove object locks. • **Allow**: Delete entries from the Object Locks database table.
Modify outreach services tables (System)	Maintain the options available for outreach services patrons. • **Allow**: Add, modify, and delete entries in the outreach services policy tables (ORS: Delivery Mode; ORS: Delivery Route/Stops; ORS: Disability; ORS: Equipment; ORS: Excluded Circ Statuses; ORS: Included Branches; ORS: Pick List Headers). These entries define the options available in the course reserve record workform.
Modify PAC Community limit by display table (System)	Set which filters are displayed for selection in the **Limit by** list for PAC community keyword searches. Define and edit custom filters, and specify which selection is at the top of the PAC community keyword **Limit by** list. • **Allow**: Modify entries in the PAC Community limit by display policy table.
Modify PAC limit by display table (System)	Set which filters are displayed for selection in the **Limit by** list for Polaris PowerPAC bibliographic searches and in Mobile PAC's advanced bibliographic search. Define and edit custom filters, and specify which selection is at the top of the PAC **Limit by** list. • **Allow**: Modify entries in the PAC Limit by display policy table.
Modify parameters (System)	Change parameters in Polaris Administration. • **Allow**: Change settings on the Parameters tabbed pages for Polaris Administration records. If you want to limit access to parameters at a specific organizational level, use the **Branches: Access**, **Libraries: Access**, and **System: Access** permissions.
Modify patron codes table (System)	Specify the descriptions for patron codes. All organizations use the settings in this table. • **Allow**: Add entries and change individual entries in the Patron Codes policy table. (You cannot delete patron code description entries using the Polaris Administration user interface.)
Modify patron statistical class codes table (System)	Specify the patron statistical classifications used in circulation reports. All organizations use the settings in this table. • **Allow**: Add entries and change individual entries in the Patron Statistical Class Codes policy table. (You cannot delete patron statistical classification entries using the Polaris Administration user interface.)
Modify patron stop descriptions table (System)	Define standard patron blocks. All organizations use the settings in this table. • **Allow**: Add entries and change individual entries in the Patron Blocks policy table. (You cannot delete block entries using the Polaris Administration user interface.)

Modify patron/materials type loan limit blocks table (System)	Define the fine rates and loan limits for each patron code and material type. All organizations use the settings in this table. • **Allow**: Change the entries in the Patron/Material Type Loan Limit Blocks table. (You cannot add or delete entries using the Polaris Administration user interface.)
Modify payment methods table (System)	Set the payment methods that display as options in the staff client. • **Allow**: Display or suppress payment method options for each branch; set the display order of the options.
Modify postal codes table (System)	Maintain the postal codes available for records that include addresses. All organizations use the settings in this table. • **Allow**: Add and delete entries in the Postal Codes database table. Change individual entries in the table.
Modify preferences (System)	*Future functionality*. Do not assign.
Modify primary display author table (System)	Not used.
Modify primary display title table (System)	Not used.
Modify product page categories (System)	Access the dialog boxes associated with the PowerPAC profile **Product page categories: Configure** and the Mobile PAC profile **Product page categories: Configure**. • **Allow**: Set content display options for the PowerPAC and Mobile PAC product pages.
Modify profiles (System)	Change profiles in Polaris Administration. • **Allow**: Change settings on the Profiles tabbed pages for Polaris Administration records. If you want to limit access to profiles at a specific organizational level, use the **Branches: Access**, **Libraries: Access**, and **System: Access** permissions.
Modify search databases table (System)	Identify Z39.50 target servers for searching. All organizations use the settings in this table. • **Allow**: Add and delete entries in the Search Databases policy table. Change individual entries in the table.
Modify selfcheck material types table (System)	Maintain the list of material types that can be circulated with a self-check unit. All organizations use the settings in this table. • **Allow**: Add and delete entries in the SelfCheck Material Types policy table. Change individual entries in the table.

Modify shelf locations table (System)

Maintain the list of shelf location descriptions available to organizations. All organizations use the settings in this table.

- **Allow**: Add and delete entries in the Shelf Locations database table. Change individual entries in the table.

Modify transaction logging table (System)

Specify which Polaris actions are recorded in a log file. All organizations use the settings in this table.

- **Allow**: Change individual entries in the Transaction Logging database table by selecting **Yes** or **No** for recording an action in Polaris.

Object/task control record (System)

View and assign permissions.

- **Access**: Open the Security folders and list permissions on the Polaris Find Tool. Does not restrict access to the Permissions view for groups, workstations, or staff members.
- **Modify**: Add and remove permission groups, staff members, workstations, and organizations in the Security folders for organizations. Also required to add and remove permissions in the Permissions view for these records.

Permission Groups (System)

Work with permission group records.

- **Access**: List and view permission group administration records. Needed to search for permission groups with the Find Tool, and open the **Permission Group** folder in the Administration Explorer.
- **Create**: Create new permission groups.
- **Modify**: Maintain permission group records; edit membership and permissions.
- **Delete**: Delete permission group records.

Resource Groups (System)

Work with Resource Group records, which associate organizations for the purpose of remote resource access.

- **Access**: Open existing Resource Group records.
- **Create**: Create new Resource Group records.
- **Modify**: Maintain Resource Group records; edit membership.
- **Delete**: Delete Resource Group records.

Servers (System)

Set up and configure servers defined in Polaris.

- **Access**
- List and view server connection records. Needed to search for servers with the Find Tool and open the Servers folder in the Administration Explorer. Needed to display servers in the Administration Explorer using the **Administration, Explorers, Servers option** or the **File, Open, Server** option.
- **Create**
- Add a server connection to Polaris using **File, New, Server** in the Administration Explorer, or **New** on the context menu for the Server folder in the tree view.
- **Modify**
- Change an existing server connection configuration.
- **Delete**
- Delete a server connection setup configuration using **Edit, Delete** in the Administration Explorer, or **Delete** on the context menu for a server name in the Administration Explorer.

Staff members (System, Library, Branch)

Work with staff member records in Polaris administration.

Access	List and view the staff member administration records. Needed to search for staff members with the Find Tool, and open the **Staff Member** folder in the Administration Explorer.
Create	Add new staff members to an organization in Polaris. Needed to use the **File, New, Staff Member** or **New staff member** on the Staff Member folder context menu. Create staff member records using the New dialog box from the Polaris Shortcut Bar.
Modify	Change a staff member record.
Delete	Delete a staff member record using **Delete** on the context menu for a staff member name or **Edit, Delete** in the Administration Explorer.

System (System)

Work with the system administration record.

Access	Open the System folder in the Administration Explorer or search for the system record with the Polaris Find Tool.
Modify	Change the name, address, and contact information in the system record. Other permissions are needed to change security and attributes for the system level.

Vendor Account (System)

Work with vendor accounts for econtent. For details, see “Implementing Ebook Vendors” in the *Polaris Cataloging Guide 4.1R2*.

Access	List and view vendor records. Needed to open the Administration Explorer for **Vendors.**
Create	Create new vendor records in Polaris.
Modify	Maintain vendor records.
Delete	Delete vendor records from Polaris.

WebAdmin access (System)

Work with WebAdmin (Polaris Language Editor), a Web-based utility that allows you to compare and customize language strings in Polaris multilingual products.

Allow Log on to WebAdmin.

Workstations (System, Branch)

Maintain and use workstation records.

- Access
- List and view the client computers registered in Polaris. Needed to search for workstations with the Find Tool, and open the **Workstation** folder in the Administration Explorer.
- Create
- Register a new workstation in Polaris. Needed to use the **File, New, Workstation** or **New Workstation** on the Workstation folder context menu. Create workstation records using the New dialog box from the Polaris Shortcut Bar.
- Modify
- Change the name and organization in the workstation record. Other permissions are needed to change permissions and attributes for the workstation.
- Delete
- Delete a workstation record. Needed to use **Delete** on the context menu for a workstation name or **Edit, Delete** in the Administration Explorer.

Find Tool Permissions Reference

These permissions are available under **Security**, **Find Tool** on the Administration Explorer, at the system level only. Staff members who use the Polaris Find Tool to do SQL searches require one or more of these permissions.

Note:
For general information about setting permissions in Polaris, see "Granting Permissions" on page 106.

Find Tool: Access SQL mode (System)

Use the Find Tool to do an SQL search.

- **Allow**: The SQL option is available for selection on the Polaris Find Tool. The staff member can search in SQL mode.

Find Tool: Create or modify named SQL searches (System)

Save an SQL search; edit a saved search and save it.

- **Allow**: The **Save** and **Save As** options are available when the Find Tool is in SQL search mode. If the staff member does not have this permission and selects **Save** or **Save As**, a permission block message appears. You can allow specific staff members to override the block. See "Set the Find Tool SQL permission blocks override" on page 200.

Find Tool: Delete named SQL searches (System)

Delete a saved SQL search.

- **Allow**: The **Delete** option is available when the Find Tool is in SQL search mode. If the staff member does not have this permission and selects **Delete**, a permission block message appears. You can allow specific staff members to override the block. See "Set the Find Tool SQL permission blocks override" on page 200.

Polaris Permission Groups - Default Permissions Reference

The following table lists the permissions initially assigned to the default permission groups. The permissions are granted for all organizations in your Polaris installation. You can change any of the permissions for the default groups. For more information about working with permissions and groups, see "Granting Permissions" on page 106.

Note:
The default permission groups are offered as a convenient way to manage permissions, but they do not include all possible permissions, and *they are not updated with new permissions when you install new releases of Polaris*. If you use the Polaris default groups, be sure to add the appropriate permissions to the groups.

Permission Group Name	*Permission Type*	*Initial Permissions*
Administrator Cannot be deleted. Membership in this group should be limited to Polaris administrators.	(All)	(All permissions at all organizations)
Polaris Circulation Clerk - Basic front desk tasks.	Access circulation control	• Allow
	Access patron services	• Allow
	Access hold request manager	• Allow
	Access reports and notices	• Allow
	Fines: waive fines at circ	• Allow
	Modify due date and time	• Allow
	Modify hold queues	• Allow
	Patron Registration	• Access • Create • Modify • Override blocks to delete
	Patron Status	• Access • Access notice history • Access patron account • Access patron account: transaction summary • Create/delete patron blocks • Display associations • Display claimed items • Display hold request list • Display items checked-out • Display notes • Display patron blocks • Display reader services • Modify patron account
	Renew items	• Allow

Permission Group Name	*Permission Type*	*Initial Permissions*
Polaris Serials Clerk - Receive and process serials.	Access serials	• Allow
	Serial Issues/Standing Order Parts	• Access • Create • Modify • Delete • Check-in • Uncheck-in
	Create a bib record from Acquisitions and Serials	• Allow
Polaris Serials Manager - Set up serials and subscriptions, as well as do all tasks of the Polaris Serials Clerk.	Access serials	• Allow
	Serial Issues/Standing Order Parts	• Access • Create • Modify • Delete • Check-in • Uncheck-in
	Serial holdings records	• Access • Create • Modify • Delete
	Supplier	• Access • Create • Modify • Delete
	Create a bib record from Acquisitions and Serials	• Allow
Polaris Ordering Staff - Create purchase orders.	Access acquisitions	• Allow
	Bibliographic records	• Access
	Create a bib from Acquisitions and Serials	• Allow
	Fiscal Years	• Access
	Funds	• Access
	Purchase Orders	• Access • Create • Modify • Delete • Print purchase orders • Print workslips
	Selection Lists	• Access • Create • Modify • Delete
	Suppliers	• Access

Permission Group Name	*Permission Type*	*Initial Permissions*
Polaris Invoicing Staff - Receive shipments from vendors.	Access acquisitions	• Allow
	Bibliographic records	• Access
	Create a bib from Acquisitions and Serials	• Allow
	Fiscal Years	• Access
	Funds	• Access
	Invoices	• Access • Create • Modify • Delete • Pay, Undo payment, Credit • Print vouchers
	Purchase Orders	• Access • Modify
	Serial Issues/Standing Order Part	• Access • Modify
	Suppliers	• Access
Polaris Acquisitions Collection Development - Request the purchase of material using selection lists.	Access acquisitions	• Allow
	Selection Lists	• Access
	Selection list line item segments	• Create • Modify • Delete
	Bibliographic records	• Access
	Funds	• Access

Permission Group Name	*Permission Type*	*Initial Permissions*
Polaris Acquisitions Manager - Authorize purchase order release and payment of invoices, and do maintenance on all acquisitions records.	Access acquisitions	• Allow
	Bibliographic records	• Access
	Create a bib from Acquisitions and Serials	• Allow
	Fiscal Years	• Access • Create • Modify • Delete
	Funds	• Access • Create • Modify • Delete • Transfer money between funds
	Invoices	• Access • Adjust • Create • Modify • Delete • Print vouchers • Pay, Undo payment, Credit
	Purchase Orders	• Access • Create • Modify • Delete • Print purchase orders • Print workslips • Release, receive, cancel, close PO • Release order exceeding fund encumbrance limits • Release order resulting in negative free balance • Send electronic purchase orders
	Selection list line item segments	• Create • Modify • Delete
	Selection Lists	• Access • Create • Modify • Delete • Approve/Reject
	Suppliers	• Access • Create • Modify • Delete

Permission Group Name	*Permission Type*	*Initial Permissions*
Polaris Bib Full Cataloger - Original cataloging.	Access cataloging subsystem	• Allow
	Access item record bulk change	• Allow
	Authority records	• Access • Create • Modify • Delete/Undelete
	Authority templates	• Access • Create • Modify • Delete
	Bibliographic records	• Access • Create • Modify • Delete/Undelete
	Bibliographic templates	• Access • Create • Modify • Delete
	Cataloging record sets	• Access • Create • Modify • Delete
	Create a bib record from the item or item template	• Allow
	Import bibliographic, item, and authority records	• Allow
	Item records	• Access • Create • Delete/Undelete • Modify header • Modify cataloging view • Modify source and acquisitions view • Modify reserves view
	Item templates	• Access • Create • Modify • Delete
	Use ‘own’ cataloging record sets	• Allow
	Use ‘own’ authority templates	• Allow
	Use ‘own’ bibliographic templates	• Allow
	Use ‘own’ item templates	• Allow

Permission Group Name	*Permission Type*	*Initial Permissions*
Polaris Bib Copy Cataloger	Access cataloging subsystem	• Allow
	Bibliographic records	• Access • Create • Modify • Delete/Undelete
	Bibliographic templates	• Access
	Item records	• Access • Create • Delete/Undelete • Modify cataloging view • Modify header • Modify history view • Modify reserves view • Modify source and acquisition view
Polaris Item Cataloger - Process new items.	Access cataloging subsystem	• Allow
	Bibliographic records	• Access
	Item records	• Access • Bulk change • Create • Delete/Undelete • Modify cataloging view • Modify header • Modify history view • Modify reserves view • Modify source and acquisition view
	Item templates	• Access
Polaris Authority Control Cataloger- Maintain authority control for the catalog database.	Access cataloging subsystem	• Allow
	Authority records	• Access • Create • Modify • Delete/Undelete
	Authority templates	• Access
	Bibliographic records	• Access

Staff Client Profiles Reference

These profiles are available under **Profiles**, **Staff Client** on the Administration Explorer, at the listed organizational levels.

Automatic logon (System, Library, Branch, Workstation)

Automatically log on the Windows-authenticated workstation user to the staff client. See "Automatic Staff Client Log-On" on page 38.

- **Default**: No

Allow Windows authentication when Automatic logon is not enabled (System, Library, Branch, Workstation)

Provides integrated security without automatic logon. See "Automatic Staff Client Log-On" on page 38.

- **Default**: No

Barcodes: Item format definition (System, Library, Branch)

1. Specifies the format used to test item barcodes scanned during various operations. See "Defining Barcode Formats" on page 217.

- **Default**: *,*
- **Format**: length, prefix
- **Valid Input**: [0-9] any number

Barcodes: Patron format definition (System, Library, Branch)

Specifies the format used to test patron barcodes scanned during various operations. See "Defining Barcode Formats" on page 217.

- **Default**: *,*
- **Format**: length, prefix
- **Valid Input**: [0-9]

Client and server version must match (System)

Enforces a check to be sure the Polaris database and staff client version numbers match. When this profile is set to **Yes** and the version numbers do not match, the user receives a message when attempting to log into the staff client, and the log-in is prevented. The message includes the specific version numbers of both the application server and the client for troubleshooting purposes. Leave this profile set to **Yes** except in the rare support situation where you are installing a new Polaris client version without upgrading your application server.

- **Default**: Yes (enabled)

Client visual alert configuration (System)

Sets an alert message at staff client log-on and/or custom title bars for a particular server; for example, a training server. See "Visual Cues for Staff Client Log-On Server" on page 35.

- **Default**: No message, no custom colors

Client/server date/time discrepancy check: Enable (System, Library, Branch, Workstation)

Enables an automatic time discrepancy check between server and client workstation to ensure consistency in transaction records. See “Ensuring Locale and Time Consistency” on page 191.

- **Default**: Yes (enabled)

Client/server date/time discrepancy beyond built-in 5 minute window (minutes) (System, Library, Branch, Workstation)

If you enable the time discrepancy check, the system allows a five-minute discrepancy between client and server time settings. If you want to add more time to the allowable five minutes, specify the number of additional minutes (0-999). See “Ensuring Locale and Time Consistency” on page 191

- **Default**: 0

Client/server date/time discrepancy warning message (System, Library, Branch)

If you enable the time discrepancy check, this message is displayed at staff client log-in when the discrepancy between client and server time settings exceeds the system’s five-minute margin but is less than any additional minutes you have set. Use this profile to specify the message text. See “Ensuring Locale and Time Consistency” on page 191.

- **Default**: Warning: Client time setting is more than 5 minutes different from server setting

Client/server date/time discrepancy violation message (System, Library, Branch)

If you enable the time discrepancy check, this message is displayed at staff client log-in when the discrepancy between client and server time settings exceeds the system’s five-minute margin plus any additional minutes you have set. The log-in fails. Use this profile to specify the message text. See “Ensuring Locale and Time Consistency” on page 191.

- **Default**: Log-in failure! Client time setting discrepancy with the server setting is beyond the configured threshold!

Default view selected when bibliographic record opened (System, Library, Branch, Workstation, Staff)

Specifies the Bibliographic Record workform view that appears when an bibliographic record is opened, regardless of how the record is opened. See “Set the Bibliographic Record workform opening view” on page 203.

Default view selected when item record opened (System, Library, Branch, Workstation, Staff)

Specifies the Item Record workform view that appears when an item record is opened, regardless of how the record is opened. See “Set the Item Record workform opening view” on page 204.

Default view selected when patron status opened (System, Library, Branch, Workstation, Staff)

Specifies the Patron Status workform view that appears when the workform is opened, regardless of how it is opened. See “Set the Patron Status workform opening view” on page 206.

Find Tool: Default number of records to return in a result set (System, Library, Branch, Workstation, Staff)

Specifies the value that appears in the **Number of records to return** box when you open a new Polaris Find Tool. This setting limits the results returned by a Polaris Find Tool search. See “Setting Find Tool Profiles” on page 199.

- **Default**: 1000

Find Tool: Filter search results by permission (System)	Specifies whether search results are automatically filtered according to the permissions assigned to the staff member and workstation. See "Setting Find Tool Profiles" on page 199. • **Settings**: **Yes** (default) - Search results are filtered; **No** - Search results display all records that meet the search criteria, regardless of permission settings.
Find Tool: Override SQL search blocks (Staff)	Specifies whether the staff member can override permission blocks on saving a SQL search, modifying a saved SQL search, or deleting a saved SQL search. See "Setting Find Tool Profiles" on page 199. • **Default**: **No**
Find tool/record-set-to-record-set creation: Record set size warning threshold (System, Library, Branch, Workstation, Staff)	Specifies the number of records that will trigger a warning message when the user has specified automatic record set creation from the Find Tool results list or from another Cataloging record set - item to bib, bib to item, authority to bib, or bib to authority. If the results set reaches or exceeds this number, the warning message gives the user the opportunity to cancel the record set. See "Setting Find Tool Profiles" on page 199 and "Using Cataloging Record Sets" in the *Polaris Cataloging Guide 4.1R2*. **Default:** **1000**
Find Tool: Use initial article table (System, Library, Branch, Workstation, Staff)	Specifies the default setting for the **Use Initial Article Table** check box on the Polaris Find Tool. This setting defines whether words listed in the Initial Article table are ignored if used in the **Search For** box. See "Setting Find Tool Profiles" on page 199. **Setting:** **Yes** (default) – The **Use Initial Articles** box is selected (checked) for each new Find Tool. **No** - The **Use Initial Articles** box is cleared for each new Find Tool.
Find Tool: Use language scoping display (System, Library, Branch, Workstation, Staff)	Specifies the languages that display in the Find Tool **Value** box when you limit by **Language** on the General tabbed page or in the **Qualifier** box on the Scoping tabbed page. See "Setting Find Tool Profiles" on page 199. **Setting:** **Yes** (default) – The languages are limited to the entries specified in the MARC Language Scoping Display policy table for the organization. **No** - All languages defined by the MARC 21 format are displayed.
Generate security history (System)	Specifies whether changes to permission assignments are logged. To see the history, right-click the permission in the **Object** list (Administration Explorer, **Security**) and select **Properties**. This profile affects all permissions at all administration levels. See "Granting Permissions" on page 106. **Setting:** **Yes** (default) – Permission changes are recorded in logs. **No** - Permission changes are not recorded.

Label Manager open using (System, Library, Branch, Staff)

Specifies whether the Label Manager displays the label setup for cataloging labels or serial labels when it is first opened. See "Setting Up Labels" in the *Polaris Cataloging Guide 4.1R2*.

Setting: **Cataloging Options** (default) – The Label Manager opens with the label setup for cataloging labels.

Serial Options - The Label Manager opens with the label setup for serial labels.

Labels: Automatically generate label for each item record created (System, Library, Branch)

Specifies if labels are automatically generated when an item record is saved. See "Setting Up Labels" in the *Polaris Cataloging Guide 4.1R2*.

Setting: **Yes** (default) – Spine and pocket labels are automatically generated when a new item record is saved as final.

No - The staff member must choose when and if labels are printed.

Labels: Automatically generate label for each SO and SUBS check-in (System, Library, Branch)

Specifies if labels are automatically generated when a standing order part or subscription issue is checked in. See "Setting Up Labels" in the *Polaris Cataloging Guide 4.1R2*

Setting: **Yes** (default) – Serial labels are automatically generated when a part or issue is checked in.

No - The staff member must choose when and if labels are printed.

Labels: Cataloging label type (System, Library, Branch, Workstation, Staff)

Specifies the label type (stock) for cataloging labels. See "Setting Up Labels" in the *Polaris Cataloging Guide 4.1R2*.

Labels: Cataloging print method (System, Library, Branch, Staff)

Specifies the default printing method for cataloging labels. See "Setting Up Labels" in the *Polaris Cataloging Guide 4.1R2*.

Setting: **On Demand** (default) – Labels are printed as they are generated. Best for continuous-feed label stock.

Batch - Generated labels are appended to a label file until the staff member chooses to print the labels. Best for sheet label stock.

Labels: Options (System, Library, Branch, Workstation)

Displays the Label Configuration dialog box where you specify the dimensions, font, alignment, and content of spine, pocket, and serial labels. At the workstation level, only the Settings tab is available; the Content tab is available at the other levels. See "Setting Up Labels" in the *Polaris Cataloging Guide 4.1R2*.

Labels: Serial label type (System, Library, Branch, Workstation, Staff)

Specifies the label type (stock) for serial labels. See "Setting Up Labels" in the *Polaris Cataloging Guide 4.1R2*.

Labels: Serial print method (System, Library, Branch, Staff)	Specifies the default printing method for serial labels. See "Setting Up Labels" in the *Polaris Cataloging Guide 4.1R2*. **Setting:** **On Demand** (default) – Labels are printed as they are generated. Best for continuous-feed label stock. **Batch** - Generated labels are appended to a label file until the staff member chooses to print the labels. Best for sheet label stock.
Library documentation - staff client (System, Library, Branch, Workstation)	Specifies the path and file or URL to display when **Library Documentation** is selected from the Help menu on the Polaris Shortcut Bar. Each workstation can display a different file or Web location. The file type you use must be supported by the software on the staff computer. See "Defining Online Documentation" on page 228. **Default** Blank **Setting:** Any valid path and file on the computer or a network resource; if you use a URL, begin with **http://**.
Locale settings between the client and server must match (System, Library, Branch, Workstation)	Enforces consistency in date and currency formats. The system checks that the server and client workstation are set to the same locale. If this profile is set to Yes and the client and server settings do not match, the staff client log-in fails and a message regarding the locale settings is displayed. (The setting does not apply to offline clients.) See "Ensuring Locale and Time Consistency" on page 191.
Online documents location (System, Library, Branch, Workstation)	Specifies the path and file location or URL of the documents to display when **Online Documents** is selected from the Help menu on the Polaris Shortcut Bar. Each workstation can display a different online document or Web location. See "Defining Online Documentation" on page 228. **Default:** **Polaris\Information\PolDocIndx.htm**, on the Polaris Application server **Setting:** Any valid path and file on the computer or a network resource; if you use a URL, begin with **http://**.
Permissions: Use Polaris-defined new permission defaults (System)	Accept or override any Polaris default settings that grant new permissions at upgrade. See "Permission Assignments at Upgrade" on page 110. **Default:** **Yes** (accept any default settings that grant new permissions)
Proxy Server (System, Library, Branch)	Specifies the proxy server that SQL Server Reporting Services should use if the Web server is outside the firewall. See "Specifying Report Servers" on page 185.
Receipt printer control codes (System)	Specifies the features (expanded, bold, red, auto-cut, cash drawer) available for specific receipt printers, and allows you to add printers. See "Set receipt printer control codes" in the *Polaris Patron Services Administration Guide 4.1R2*.
Receipts: Cash drawer opens for cash payments only (System, Library, Branch)	If the receipt printer is set up to open the cash drawer, this profile can be set to **Yes** to open the cash drawer only when the receipt is printed and the payment is in cash. See "Set option to open the cash drawer only for cash fine receipts" in the *Polaris Patron Services Administration Guide 4.1R2*.

Receipts: Support Epson ILS (System, Library, Branch, Workstation)	Enables hold pick-up and in-transit slip data to be exported to Epson ReStick printers. See "Epson® ReStick™ Printers - Hold and In-Transit Slips" in the *Polaris Patron Services Administration Guide 4.1R2*. **Default:** No
Report Server (System, Library, Branch, Staff)	Specifies the server and services URL where SQL Server Reporting Services, the Report Manager, and Report Designer (if you use it) are located. Also controls what organizations are displayed for report parameters and at the system level, how the maximum number of entries displayed in report parameter lists. See "Specifying Report Servers" on page 185.
Spine Labels (Dewey): Carriage return after decimal (System, Library, Branch, Staff)	Indicates if a new line should be started after the decimal on spine labels if the library is using the Dewey shelving scheme. See "Setting Up Labels" in the *Polaris Cataloging Guide 4.1R2*. **Setting:** **Yes** – A new line is started after the Dewey Decimal number. **No** (default) - Does not start a new line after the Dewey Decimal number. Prime marks may create new lines if allowed.
Spine Labels (Dewey): Prime mark to generate carriage return (System, Library, Branch, Staff)	Specifies the prime mark in Dewey Decimal numbers used to indicate where a new line should start on spine labels. The prime marks must be inserted with the contents in the call number boxes on the Item Record workform. See "Setting Up Labels" in the *Polaris Cataloging Guide 4.1R2*. **Settings:** **None** (default) – New lines are not generated for prime marks. **Apostrophe '** - A new line is started on spine labels when an apostrophe is encountered in the Dewey Decimal number. **Forward Slash /** - A new line is started on spine labels when a forward slash is encountered in the Dewey Decimal number.
Spine Labels (non-Dewey): Carriage return after space (System, Library, Branch, Staff)	Indicates if a new line should be started after a space in the call number on spine labels if the library is using a non-Dewey shelving scheme. See "Setting Up Labels" in the *Polaris Cataloging Guide 4.1R2*. **Default:** **Yes** – A new line is started after the number.
Utilities: Web Browser default URL	Specifies the URL (255 character maximum) for the default Web page that opens from the **Utilities, Web Browser** option on the Polaris Shortcut Bar. If the value is blank, the menu option is disabled. See "Setting a Default Web Page" on page 227. **Default:** http://polarislibrary.com

Administration Tables Reference

This section describes database, policy, and notification tables as they are displayed on the Administration Explorer at the listed organizational levels.

For general instructions on working with Polaris Administration tables, see "Editing Parameters, Profiles, and Tables" on page 14.

For information about querying the transaction database, see "Polaris Transactions Database" on page 209.

In addition, the Polaris Customer Extranet offers a complete release-specific description of Polaris database tables. Select **Polaris Releases**, **Polaris *[version]***, **Database Help**.

See the following topics:

Policy Tables

Addresses (System, Library, Branch)
Provides a standard set of addresses for use in all the organization records that include street addresses. See "Setting Organization Addresses" on page 66.

Authority Overlay Retention (System, Library, Branch)
Specifies tags to retain when an existing authority record is overlaid with a new one. See "Managing Duplicate MARC Records" in the *Polaris Cataloging Guide 4.1R2*.

Authority Record Import: Preferred Cataloging Source (System, Library, Branch)
Lists the codes for cataloging sources the organization considers to be valid sources for authority records. If this table is empty, any imported authority record with any code in tag 040 $a is considered to come from a preferred cataloging source. See "Managing Duplicate MARC Records" in the *Polaris Cataloging Guide 4.1R2*.

Bibliographic Tags to Retain/ Delete (System, Library, Branch)
Specifies tags to retain when an existing bibliographic record is overlaid with a new one. See "Managing Duplicate MARC Records" in the *Polaris Cataloging Guide 4.1R2*. It is also used to specify tags to delete from incoming new bibliographic records whether or not the incoming records are duplicates of existing records. See "Deleting MARC Tags from Incoming Bibs" in the *Polaris Cataloging Guide 4.1R2*.

Claim Reasons (System, Library, Branch)	Defines the standard claim reasons that can be selected in the **Reason** box on the Claim workform. See "Managing Receiving" in the *Polaris Acquisitions Guide 4.1R2*.
Contact Persons (System, Library, Branch)	Provides a standard list of contact people for use in all the organization records that require contact information. The table entries are displayed as options in the **Primary** and **Alternate** contact boxes on the organization workforms. See "Identifying Organization Contacts" on page 68.
Countries (System, Library, Branch)	Defines the postal code lengths and styles for the countries in which the library sends mail. See "Setting System Postal Codes" on page 60.
Course Reserves: Course Names (System, Library, Branch)	Licensed feature. Associates the organizations (branches) with the course numbers, section numbers, course names, and course abbreviations for which the branches handle course reserves. See "Setting Up Course Reserves" in the *Polaris Patron Services Administration Guide 4.1R2*.
Course Reserves: Course Terms (System, Library, Branch)	Licensed feature. Associates the organizations (branches) with the course terms, course start dates, and course end dates for which the branches handle course reserves. See "Setting Up Course Reserves" in the *Polaris Patron Services Administration Guide 4.1R2*.
Course Reserves: Departments (System, Library, Branch)	Licensed feature. Associates the organizations (branches) with the academic departments for which the branches handle course reserves. See "Setting Up Course Reserves" in the *Polaris Patron Services Administration Guide 4.1R2*.
Course Reserves: School/ Divisions (System, Library, Branch)	Licensed feature. Associates the organizations (branches) with the academic schools or divisions for which the branches handle course reserves. See "Setting Up Course Reserves" in the *Polaris Patron Services Administration Guide 4.1R2*.
Cross Reference Display Constants (System, Library, Branch)	Specifies the labels that identify cross-references in PAC browse search results. See "Cross-Reference Display in Browse Search Results" in the *Polaris Public Access Administration Guide 4.1R2*.
Currencies (System, Library, Branch)	Specifies foreign currencies used in Acquisitions processing. All organizations use the settings in this table. See "Administering Foreign Currencies" in the *Polaris Acquisitions Guide 4.1R2*.
Dates Closed (System, Library, Branch)	Lists dates that an organization is closed when it otherwise would be open for business (for example, holidays). See "Identifying Dates Closed" on page 70. **Note:** You specify the *days of the week* when a branch is ordinarily closed, such as Sunday, with the Patron Services parameter **Hours of operation.**

Fee Descriptions (System, Library, Branch)	Defines and standardizes fee descriptions. Entries in this table display as selections on views and dialog boxes where you transact charges for patrons. At the branch level, the table offers options to select or suppress descriptions in the list of fee reasons displayed to branch staff members, and to set the display order of the list. See "Defining Fee Descriptions" in the *Polaris Patron Services Administration Guide 4.1R2*.
Fine Codes (System, Library, Branch)	Defines fine codes, which represent the various fine policies used in combination with patron codes to determine fine amounts. Fine codes are displayed as selections in the Fines policy table and in the Fine code box on the Item Record workform. See "Setting Fine Codes" in the *Polaris Patron Services Administration Guide 4.1R2*.
Fines (System, Library, Branch)	Specifies fine amounts, based on the patron code of the person being charged and the fine code assigned to the item. See "Setting Fine Amounts" in the *Polaris Patron Services Administration Guide 4.1R2*.
Floating: To Branch (System, Library, Branch)	Specifies what branches may receive items from the home branch. See "Setting Up Floating Collections" in the *Polaris Patron Services Administration Guide 4.1R2*.
Floating: Material Types (System, Library, Branch)	Specifies what material types may not float from the home branch, even if some items are part of a floating collection. See "Setting Up Floating Collections" in the *Polaris Patron Services Administration Guide 4.1R2*.
Floating: Material Type Limits (System, Library, Branch)	Specifies how many items of the same title (attached to the same bibliographic record) and of a specific material types the receiving branch is willing to accept. See "Setting Up Floating Collections" in the *Polaris Patron Services Administration Guide 4.1R2*.
Fund Categories (System, Library, Branch)	Defines donation fund categories for the acquisitions budget. See "Administering Funds/Fiscal Years" in the *Polaris Acquisitions Guide 4.1R2*.
Holds Routing Sequences Primary (System, Library, Branch)	Determines whose items can be trapped at circulation to fill a request, and specifies the RTF routing sequences of hold requests from the requester branch to other branches. See "Setting Up Holds Routing" in the *Polaris Patron Services Administration Guide 4.1R2*.
Holds Routing Sequences Secondary (System, Library, Branch)	Optional. You can set up a secondary RTF routing sequence with this table, to be used after a request has gone through the primary routing sequence. See "Setting Up Holds Routing" in the *Polaris Patron Services Administration Guide 4.1R2*.
Initial Articles (System, Library, Branch)	Specifies words that can be stripped from the beginning of Find Tool exact match search strings. See "Defining Leading Articles" on page 193.
Item Availability Display Order (System, Library, Branch)	Specifies the branches listed as **Local** and **System** and the order in which they are listed in the PAC item availability display. See "Setting Up Local and System Availability" in the *Polaris Public Access Administration Guide 4.1R2*.

Item Statistical Class Codes (System, Library, Branch)	Defines item statistical codes, useful for creating specific circulation reports an organization may require. Find Tool searches for item records can be limited by statistical code, and they are displayed for selection in the Statistical code box on the Item Record workform. See "Defining Item Statistical Codes" in the *Polaris Patron Services Administration Guide 4.1R2*.
Link to Supplier Databases (System, Library, Branch)	Defines suppliers' names and URLs to list when users select **Utilities, Link to supplier databases** from the Polaris Shortcut Bar. See "Managing Supplier Records" in the *Polaris Acquisitions Guide 4.1R2*.
Loan Period Codes (System, Library, Branch)	Defines loan period codes, which are the names assigned to the various loan periods established by each organization. They are used in combination with patron codes to calculate due dates and fine amounts. See "Defining Loan Period Codes" in the *Polaris Patron Services Administration Guide 4.1R2*.
Loan Periods (System, Library, Branch)	Defines loan periods, which specify how long an item can be checked out based on the loan period code assigned to the item and the patron code of the person checking out the item. See "Defining Loan Period Durations" in the *Polaris Patron Services Administration Guide 4.1R2*.
MARC Language Scoping Display (System, Library, Branch)	Identifies the languages that display as options for limiting staff client and/or PAC searches to material published in specific languages. See "Setting Language Display" in the *Polaris Administration Guide 4.1R2*.
Material Types (System, Library, Branch)	Names the various material types held by the library. Material types are used in determining loan periods and lending limit blocks, and in generating statistics. See "Defining Material Types" in the *Polaris Patron Services Administration Guide 4.1R2*.
NCIP Medium Types: Incoming (System)	Maps NCIP Medium to Polaris item material types for incoming requests, and is used for requests where the Polaris library is the borrower. This table allows the library to create ILL items with different material types. See "Mapping Item Material Types to NCIP Medium Types" in the *Polaris Patron Services Administration Guide 4.1R2*.
NCIP Medium Types: Outgoing (System)	Maps the library's Polaris item material types to NCIP medium types and is used for requests where the Polaris library is the lender. See "Mapping Item Material Types to NCIP Medium Types" in the *Polaris Patron Services Administration Guide 4.1R2*.
NCIP User Privilege Types (System)	Maps Polaris patron codes to NCIP standard public and/or academic user privilege types. See "Mapping Patron Codes to NCIP User Privilege Types" in the *Polaris Patron Services Administration Guide 4.1R2*

Outreach: Delivery Mode (System, Library, Branch)	Licensed feature. Sets the possible methods by which your organization delivers items to outreach services patrons. Each method you specify will appear as a selectable option in the Patron Delivery Options dialog box (Patron Status workform - Reader Services view). The method will also appear as an option for filtering the patron list in the Outreach Services Manager when outreach services processing is done for multiple patrons. See "Setting Up Outreach Services" in the *Polaris Patron Services Administration Guide 4.1R2*.
Outreach: Delivery Route/ Stops (System, Library, Branch)	Licensed feature. Defines delivery routes and specifies stops along the routes. Each route you specify will appear as a selectable option in the Patron Delivery Options dialog box (Patron Status workform - Reader Services view). The route will also appear as an option for filtering the patron list in the Outreach Services Manager when outreach services processing is done for multiple patrons. See "Setting Up Outreach Services" in the *Polaris Patron Services Administration Guide 4.1R2*.
Outreach: Disability (System, Library, Branch)	Licensed feature. Optional. Defines the options staff can select to note an outreach patron's disability in the patron's record. Each disability description you specify will appear as a selectable option in the Patron Preferences dialog box (Patron Status workform - Reader Services view). See "Setting Up Outreach Services" in the *Polaris Patron Services Administration Guide 4.1R2*.
Outreach: Equipment (System, Library, Branch)	Licensed feature. Optional. Defines the options staff can select to specify a special equipment need for an outreach patron. Each equipment description you specify will appear as a selectable option in the Patron Preferences dialog box (Patron Status workform - Reader Services view). See "Setting Up Outreach Services" in the *Polaris Patron Services Administration Guide 4.1R2*.
Outreach: Excluded Circ Statuses (System, Library, Branch)	Licensed feature. Sets the item circulation statuses that should be excluded from outreach selection list processing. See "Setting Up Outreach Services" in the *Polaris Patron Services Administration Guide 4.1R2*.
Outreach: Included Branches (System, Library, Branch)	Licensed feature. Sets the branch items that should be included in outreach selection list processing. Works with the Patron Services parameter **ORS: Include other library items in selection list processing**. See "Setting Up Outreach Services" in the *Polaris Patron Services Administration Guide 4.1R2*.
Outreach: Pick List Headers (System, Library, Branch)	Licensed feature. Specifies the column heads for outreach services pick lists, and the order in which they appear on the workform. See "Setting Up Outreach Services" in the *Polaris Patron Services Administration Guide 4.1R2*.
PAC Community Limit By Display (System, Library, Branch)	Specifies which filters, if any, are displayed for selection in the **Limit by** list for PAC community keyword searches. You also use this table to define and edit your own filters, and to specify which selection is at the top of the PAC community keyword **Limit by** list. See "Setting Community Search Options for PAC" in the *Polaris Community Profiles Guide 4.1R2*.

PAC Limit By Display (System, Library, Branch)	Specifies which formats/types of material, if any, are displayed for selection in the **Limit by** list in Polaris PowerPAC and in Mobile PAC's advanced search. You also use this table to define and edit your own filters, and to specify which selection is at the top of the PAC **Limit by** list. See "Setting Up Search Filters (Limit By)" in the *Polaris Public Access Administration Guide 4.1R2*.
Patron/Material Type Loan Limit Blocks (System, Library, Branch)	Defines loan and request limit blocks based on combinations of patron codes and material types. See "Defining Loan and Request Limit Blocks" in the *Polaris Patron Services Administration Guide 4.1R2*.
Patron Block Descriptions (System, Library, Branch)	Defines the standard patron blocks available as selections in the Library assigned box on the New Block dialog box (Patron Status workform). At the branch level, you can also designate which of these triggers a line of text in the PAC patron account summary. See "Defining Patron Block Descriptions" in the *Polaris Patron Services Administration Guide 4.1R2*.
Patron Codes (System, Library, Branch)	Defines patron codes that are typically assigned to patrons when they register. Patron codes define available services, loan periods, fines, and limits for specific classes of patrons. They are also used for reports. See "Defining Patron Codes" in the *Polaris Patron Services Administration Guide 4.1R2*.
Patron Statistical Class Codes (System, Library, Branch)	Defines patron statistical codes that are useful for demographic or other reports. You can limit Find Tool searches for patron records by statistical class (code), and they are displayed for selection in the Statistical class box on the Patron Registration workform. See "Defining Patron Statistical Codes" in the *Polaris Patron Services Administration Guide 4.1R2*.
Payment Methods (System, Library, Branch)	Sets the payment method options available in the staff client for accepting payments on patron accounts. See "Setting Payment Method Options" in the *Polaris Patron Services Administration Guide 4.1R2*.
Search Databases (System, Library, Branch)	Lists the databases available for Find Tool searches in the staff client for each organization. At the branch level, you can open the table for a specific branch and delete any database you do not want to display in the Find Tool for that branch. See "Controlling Database Access in the Staff Client" on page 178.
SelfCheck Material Types (System, Library, Branch)	Associates Polaris material types with self-check media types for SIP self-check units. See "Setting Up SIP Self-Check" in the *Polaris Patron Services Administration Guide 4.1R2*.
User Defined Hold Not Supplied Reasons (System, Library, Branch)	Defines the possible reasons that staff members can select when denying a hold request. See "Defining Not-Supplied Reasons" in the *Polaris Patron Services Administration Guide 4.1R2*.

Database Tables

Authority Control (System, Library, Branch) Read-only. Specifies which bibliographic tags are subject to authority control, as well as which authority tags are used for each bib tag in the table. See "Authority Records" in the *Polaris Cataloging Guide 4.1R2*.

Authority Deduplication (System, Library, Branch) Rules in this table determine if imported or saved authority records are duplicates of existing records. See "Managing Duplicate MARC Records" in the *Polaris Cataloging Guide 4.1R2*.

Bibliographic Deduplication (System, Library, Branch) Rules in this table determine if imported or saved bibliographic records are duplicates of existing records. See "Managing Duplicate MARC Records" in the *Polaris Cataloging Guide 4.1R2*.

Circulation Statuses (System, Library, Branch) Identifies the standard names for item circulation statuses. You can change the descriptive names but the actual statuses are read-only. See "Viewing Circulation Statuses" in the *Polaris Patron Services Administration Guide 4.1R2*.

Did You Mean Overrides (System, Library, Branch) For PAC, specifies your own Did You Mean suggestions for specific search terms to be displayed instead of the program's suggestions. See "Setting Up Did You Mean Term Checking" in the *Polaris Public Access Administration Guide 4.1R2*.

Geographic Coordinates (System) For Polaris PowerPAC, holds the latitude and longitude values for organizations that might be displayed with the Map It (Google Maps™) feature in PowerPAC search results. See "Map It (Google Maps) in PAC" in the *Polaris Public Access Administration Guide 4.1R2*.

Hold Request Statuses (System, Library, Branch) Specifies the hold request status descriptions displayed in the staff client and PAC patron account. See "Specifying Hold Status Descriptions" in the *Polaris Patron Services Administration Guide 4.1R2*.

In-House IP Addresses (System) Identifies specific IP addresses to be considered local (in-house) workstations, even though they are not registered as workstations in Polaris. See "Identifying In-House Computers" on page 91.

Item Block Descriptions (System, Library, Branch) Defines the library-assigned item blocks that can stop circulation, listed as options in the **Library assigned** box on the Notes and Notices view of the Item Record workform. See "Defining Item Blocks" in the *Polaris Patron Services Administration Guide 4.1R2*.

Item Create Call Number Hierarchy (System, Library, Branch) Specifies the tags in the bibliographic record to use for the call number in the linked item record and the precedence in which the tags are checked for the call number. See "Copying Bib Data to Items" in the *Polaris Cataloging Guide 4.1R2*.

Item Create Price Hierarchy (System, Library, Branch) Specifies the order of bibliographic record fields to check for price when creating a linked item. See "Copying Bib Data to Items" in the *Polaris Cataloging Guide 4.1R2*.

Mobile Phone Carriers (System) Identifies the mobile phone service carriers that will appear as options for selection in the Patron Registration workform and when patrons register or update their account information from the PAC. See "Delivering Notices by Text Message" in the *Polaris Patron Services Administration Guide 4.1R2*.

Network Domains (System) For multi-domain networks, specifies the NetBIOS Name and DNSName for each domain in your network. See "Multi-Domain System Support" on page 101.

Object Locks (System, Library, Branch) When a Polaris record is open, an entry is automatically made in the Object Locks table so that no one else can change the record. When the record is closed, the entry is automatically removed from the Object Locks table. You can manually remove an object lock from the table. See "Managing Record Locks" on page 12.

Postal Codes (System, Library, Branch) Initially contains the entire list of valid U.S. Zip codes; works with the Countries policy table. When you enter an address in Polaris, you select a country (U.S. or Canada) and type a valid postal code. The **City** and **State** boxes are automatically filled in. Use the Postal Codes table to keep the entries current. See "Setting System Postal Codes" on page 60.

Primary Display Author (System, Library, Branch) Specifies the author tags and subfields and their order of precedence used to construct the display of an author in search results. See "Viewing Title and Author Elements" on page 198.

Primary Display Title (System, Library, Branch) Specifies the title tags and subfields and their order of precedence used to construct the display of a title in search results. See "Viewing Title and Author Elements" on page 198.

Shelf Locations (System, Library, Branch) Determines the branch's shelf location options in an item record. See "Naming Shelf Locations" in the *Polaris Public Access Administration Guide 4.1R2*.

Transaction Logging (System, Library, Branch) Specifies which Polaris transactions are logged for statistical and reporting purposes. See "Logging Transactions" on page 207.

Notification Tables

Notification Dates Not to Call (System) Sets the dates that the phone notification server does not call patrons. See "Delivering Notices by Phone (Outbound Telephony)" in the *Polaris Telephony Administration Guide 4.1*.

Record Ownership Fields Reference

This section lists the fields that identify record ownership in Polaris records and the organizations that can own them. Many Polaris permissions are based on record ownership. See "Permission Strategies" on page 107.

Record Type	*Owning Organization*	*Ownership Field on Workform*
Acquisitions		
Claim record	Branch	Ordered at (Name) in linked PO
Fiscal Year	Branch	Owner
Fund	Branch	Owner
Invoice	Branch	Paid by (Name)
Purchase Order	Branch	Ordered at (Name)
Selection List	Library	Created at (Library)
Cataloging		
Authority	System	(No field - always owned by system)
Authority template	System, Library, Branch	Template owner
Bibliographic	System, Library, Branch	Owner
Bibliographic template	System, Library, Branch	Template owner
Course reserve	System, Library, Branch	Owner
Course reserve template	System, Library, Branch	Template owner
Item	System, Library, Branch	Owner
Item template	System, Library, Branch	Template owner
Reserve item template	System, Library, Branch	Template owner
Circulation/Patron Services		
Hold request	Branch	Pickup branch
ILL request	Branch	Pickup branch
Patron registration	Branch	Registered at
Patron status	Branch	Registered at
Community		
Community	System, Library, Branch	Owner
Serials		
Route list	System, Library, Branch	Owner
Serial holdings	Branch	Destination
Serial issues/Standing order parts	Branch	Destination
Subscription	System, Library, Branch	Owner
Suppliers	Branch	Owner

Polaris SQL Jobs Reference

This table is a summary of the SQL jobs that handle Polaris automatic processing operations. If you have the appropriate network privileges, you can view status and scheduling information for these jobs in the SQL Job Activity Monitor.

Note:
By default, error logs for SQL jobs are located in **C:\ProgramData\Polaris\[version]\Logs\SQLJobs** (if there is a data link, **C:\ProgramData\Polaris\[version]\[DataLinkName]\Logs\SQLJobs).**

Job Name	*Function*	*Default Enabled*	*Default Schedule*
AcquisitionsOvernight_Claiming_Cancellation	Identifies Purchase Order Line Item segments eligible for claiming or cancellation; changes statuses to Pending Claim or Cancelled; updates linked Purchase Orders and Purchase Order Line Items accordingly. All cancelled objects will have linked fund transactions reversed.	Yes	Daily 5:10 am
BookSenseImport	Checks Polaris for new IndieBound (formerly Book Sense) best-seller list distribution and populates local database for display in the Polaris PowerPAC dashboard. See "Best-Seller Lists from IndieBound (Book Sense, Inc.)" in the *Polaris Public Access Administration Guide 4.1R2*.	Yes	Daily 6:11 am
Build up Compressed Holdings statement	Generates the compressed holdings statement for serials that is displayed in PAC search results. The statement is built from retained Issue/Part records at the system and each location level. It begins with the earliest issue retained and ends with the latest, but it does not reflect gaps in the holdings. See "Displaying Serial Titles in the PAC" in the *Polaris Serials Guide 4.1R2*.	Yes	Daily 11:00 pm
CashDrawer_DailyDeleteRows	For libraries that use CLASS POS. Purges completed transactions from the table used by both applications for communication. Does not affect patron account tables.	No	Daily 11:00 pm
Cataloging Background Tasks	Background process that manages the execution of all MARC data related background tasks, including Authority change distribution to bibs, Authority link management and Bib Bulk Change processing.	Yes	Every 5 minutes 7:00 am to 8:00 pm
CatalogingImportJob (1, 2, 3)	Importing cataloging records. The three jobs run 1 minute apart from each other. No user can have more than one job running at a time.The three jobs allow multiple users to import records more efficiently.	N/A	Every 3 minutes

Job Name	*Function*	*Default Enabled*	*Default Schedule*
Cataloging_PurgeProcessing	Executes stored procedure Cat_PurgeDeletedRecords that performs the following: -Checks CatPurgeCriterias table for ScheduledDate <= current day -Purges Authority, Bibliographic or Item records that have been marked for deletion -Purges Record Sets that have been marked for deletion	Yes	Daily 5:10 am
ClassificationIndex Maintenance	Maintains the PIM_ClassificationIndex used by the Polaris Inventory Manager (available by separate purchase); indexes any modified or created items since the last time the job ran. This is a local call number index that does not include the Call Number Prefix. Used for shelf list sorting.	Yes	Daily 5:27 am
Clean Notification Queue	Removes items from the Results..Notification Queue table that are no longer overdue or held. It also removes entries from the notification queue where the delivery option is fax.	Yes	Hourly
CopyOfflineFiles	Allows administrators to have the SQL Agent automatically update the offline files on designated workstations. This job must be run under an account that has rights to copy the files to the local workstations on the network. See “Copying Files to the Offline Client Automatically” in the *Polaris Patron Services Administration Guide 4.1R2*.	No	N/A
Dashboard_MostCirculated	Populates Most Circulated Web part elements (Titles, Subjects, Authors) for display in the Polaris PowerPAC dashboard. When completed it resets the dashboard monthly circ counters. See “Automatic Web Parts” in the *Polaris Public Access Administration Guide 4.1R2*.	Yes	Monthly Day 1 - 5:00 am
Dashboard_NewTitles	Creates the New Titles Web part elements (new books, new sound recordings, new video, new large print) for display in the Polaris PowerPAC dashboard. See “Automatic Web Parts” in the *Polaris Public Access Administration Guide 4.1R2*.	Yes	Daily 4:50 am
Data Validation	Performs application level data validation checks.	Yes	Daily 5:15 am
DBCC_Nightly	Data consistency check and optimization. Performs defragmentation and index optimization on all Polaris application databases. Should be run during minimal load time.	Yes	Daily 1:00 am
Did You Mean Processing	Builds keyword counts for use in PAC “did you mean” search suggestion, and populates metaphones for search suggestions. See “Setting Up Did You Mean Term Checking” in the *Polaris Public Access Administration Guide 4.1R2*.	Yes	Monthly First Sunday at 7:00 am

Job Name	*Function*	*Default Enabled*	*Default Schedule*
EDIAgent	For libraries that send electronic purchase orders and receive acknowledgments and invoices electronically using electronic data interchange (EDI). Checks Polaris Supplier records for ElecCommFlag = 1; connects to the FTP servers specified in the Supplier records; calls the Acquisitions parameter for active or passive FTP transmission; scans the supplier's FTP server for order acknowledgments and invoices; downloads and parses the appropriate files. It will also check for and retrieve Advanced Shipment Notice (ASN) files if the supplier record indicates the supplier can produce them. See "Setting Up EDI Ordering" in the *Polaris Acquisitions Guide 4.1R2*.	No	Daily 8:00 am
Expire Community Events	For libraries that use Polaris Community Profiles. Automatically finds any event where the expiration date is less than the date the job runs, marks it not to display in PAC, and indexes the record accordingly. When a PAC user saves a new (or existing) event where the expiration date is less than the current date the record is automatically marked not to display in PAC. When a PAC user saves a new or existing event where the expiration date is greater than the current date, the event is automatically marked to display in PAC. This logic does not apply to the staff client, since the staff user has control of the **Display in PAC** setting when saving a record. This means although staff-created events where the expiration date is less than the current date will automatically be set not to display in PAC, the staff user could also create an event with a future expiration date and manually mark it not to display in PAC. See "Enter a community event in the staff client" in the *Polaris Community Profiles Guide 4.1R2*.	Yes	Daily 1:00 am
Holds Overnight Processing	Processes hold requests to fill; deletes Expired, Not-Supplied, Cancelled holds which have been in this status for greater than the number of days specified in Polaris Administration. See "Setting Up Holds and ILL Request Processing" in the *Polaris Patron Services Administration Guide 4.1R2*.	Yes	Daily 5:00 am
ISBN List Creator	Generates a CSV file in ***{Server - Active Node}/*** **ProgramData/Polaris/4.0/Logs/SQLJobs** that lists the ISBNs for bibliographic records in your catalog where the ISBN is valid, the record status is final, and the record is set to display in PAC. The file is used to update the library's holdings with NoveList Select. See "Updating the Library's Holdings for NoveList Select" in the *Polaris Public Access Administration Guide 4.1R2*	No	Weekly Monday 1:10 am
Item Shelving Status	Maintains the optional Item record ShelvingBit flag that indicates a recently checked in item is being shelved. These items are displayed with the optional Shelving status in the PAC. See "Setting Shelving Status" in the *Polaris Patron Services Administration Guide 4.1R2*. Note: The stored procedure checks the smallest shelving duration, divides it by 2, and determines if that many minutes has passed since the last run of the job. If not, the job does not run.	Yes	Every 9 minutes 7:30 am to 9:00 pm

Job Name	*Function*	*Default Enabled*	*Default Schedule*
Keyword Processing	Maintains keyword weighting accuracy for relevancy ranking in PAC search results without reindexing. Also updates the auto-suggest index with changes to bib, authority and patron records for use in the auto-suggest search terms list in the Find Tool and PAC. See "Managing Auto-Search Suggestions" in the *Polaris Cataloging Guide 4.1R2*	Yes	Daily 3:00 am
ManageItemRecordHistory	Deletes item record histories based on the system-level Polaris Administration setting for the Cataloging parameter **Item record history time threshold**. See "Displaying Cataloging Records" in the *Polaris Cataloging Guide 4.1R2*.	Yes	Daily 5:27 am
MostPopularList	Generates the most popular list (circulation and hold request statistics) to be extracted for contribution to the "Best Sellers: Books Most Borrowed" feature in *Library Journal*. See "Sending Circulation Statistics to Library Journal" on page 216.	Yes	Twice monthly 1st and 15th
Notices Processing	Daily notices processing: processes Fine Notices; processes Overdue and Bill Notices; processes Hold Notices for e-mails only; processes Reminders (almost overdue, expiration and inactive); sends e-mail notices by calling PolEmailManager.exe; processes Hold Notices for mail if exporting hold notices is enabled; exports Overdue, Bill, Hold and Fine notices by calling ExportNotices.exe if exporting notices is enabled. See "Managing Notification" in the *Polaris Patron Services Administration Guide 4.1R2*.	Yes	Daily 6:00 am
OfflineExtract	Extracts data to the Polaris offline Access databases for offline Polaris circulation services. See "Managing Offline Circulation" in the *Polaris Patron Services Administration Guide 4.1R2*.	Yes	Daily 5:51 am
PAC Availability	Recalculates availability counts in the event that the Polaris Administration setting for item status suppression changed.	Yes	Daily 5:45 am
PAC Popularity	Updates the popularity value associated with each bibliographic record, used in the PAC Most Popular sort feature. See "Specifying Default Search Settings" in the *Polaris Public Access Administration Guide 4.1R2*.	Yes	Daily 4:45 am
Patron Address Check	Places a stop on a patron whose address check date has been exceeded. This job requires a stop in the patronstopdescriptions table like this: "Address Check Required"	Yes	Daily 6:00 am
Patron Delete	Using the SA parameters set for patron deletion and based on the SA settings, this job does one of the following: -Deletes the patron records that fit the deletion criteria. Patron records that fit the exception criteria are put into the exception record set. -Puts the patron records that qualify for deletion into the patron record set selected in SA. See "Setting Options for Deleting Patron Records" in the *Polaris Patron Services Administration Guide 4.1R2*.	No	N/A

Job Name	*Function*	*Default Enabled*	*Default Schedule*
Patron Processing	Performs overnight tasks specific to patrons: -Maintains the patron reading history table and deletes rows which exceed SA limits -Updates recurring EOT dates and those that are less than the current date -Removes completed patron account transactions -Removes unused patron addresses	Yes	Daily 6:45 am
Polaris_Collection	For libraries that use Polaris collection agency processing; enabled as part of setup when you subscribe to Collection Agency. Identifies patrons who have been flagged for collection since the last Submission report was generated and sends the Submission report by e-mail to the collection agency and/or copies it to a designated directory. Also generates the Update report, which includes all patrons who are in collection and have had any activity (new charge, payment, or waive) at the reporting organization since the last report (Submission or Update) was generated. See "Managing Collection Agency Services" in the *Polaris Patron Services Administration Guide 4.1R2*.	No	N/A
Polaris_ CollectionSynchronization	For libraries that use Polaris collection agency processing; enabled as part of setup when you subscribe to Collection Agency. Identifies patrons currently reported to the collection agency, including each patron's barcode, name, and the amount due. See "Managing Collection Agency Services" in the *Polaris Patron Services Administration Guide 4.1R2*.	No	N/A
PolarisScheduling Executive	For libraries that use Polaris SimplyReports. Runs scheduled tasks for SimplyReports.	Yes	Every 30 minutes
ProcessHoldRequests	Processes hold requests, adding new requests and updating the status of existing requests. See "Setting Up Holds and ILL Request Processing" in the *Polaris Patron Services Administration Guide 4.1R2*.	Yes	Every 5 minutes 6:00 am to 9:00 pm
PurgePatronIDFromCirc Transactions	Purges patron identification information from transactions according to settings in the Patron Services parameter Remove patron ID from circ transactions. See "Removing Patron ID Information from Transaction Files" in the *Polaris Patron Services Administration Guide 4.1R2*.	Yes	Daily 2:45 am
RSS_PopulateNewTitles	Creates RSS feed entries from Polaris PowerPAC for new titles (new books, new sound recordings, new video, new large print). See "Setting Up RSS Feeds" in the *Polaris Public Access Administration Guide 4.1R2*.	Yes	Hourly 5:05 am to 11:05 pm
SDIDaily	Uses the SDIAgent executable to run searches saved by patrons in the PAC (search agent feature). On any given run, both the weekly and monthly searches scheduled to run on that date are processed. Any errors in the job are reported in an error log, which is placed in the same folder as the job report. See "PAC Search Agent (Saved Searches)" in the *Polaris Public Access Administration Guide 4.1R2*.	Yes	Daily 5:11 am

Job Name	*Function*	*Default Enabled*	*Default Schedule*
Serial Claiming Process	-For organizations that do unmediated claiming, updates issue/part status to Claimed and creates related claiming data according to the serial holdings record claiming criteria. Generates claiming notices according to SA settings. -For organizations that do mediated claiming, updates issue/part status to pending claim and creates related claiming data according to the serial holdings record claiming criteria. See "Claiming in Serials" in the *Polaris Serials Guide 4.1R2* and "Setting Up Serials Claiming" in the *Polaris Serials Guide 4.1R2*.	Yes	Daily 6:00 am
Stop Expired Patrons	Places a stop on all Patrons whose expiration date is less than the current date.	Yes	Daily 5:33 am
Subfield Nine Utility	Deletes specific tags that have been used to mark pre-existing embedded holding tags before importing, to create item records when bibliographic records are imported, or to create line item segments when bibliographic records are bulk added to selection lists or purchase orders. See "Setting Utility to Delete Bib Tags Marked with Subfield 9" in the *Polaris Cataloging Guide 4.1R2*	No (must set up profile)	Nightly
Transaction Processing	Generates daily transaction aggregates and patron reading history entries.	Yes	Daily 5:33 am
YearEndCircCountRollover	Run once annually to roll over item, bib, and patron circulation counters to previous year tables and zero out the current year-to-date counters.	No	Annual (when enabled)
ZMARCAuthorityUpdates	Available by subscription. Retrieves Authority record updates from ZMARC. This job invokes the program MARCRecordServiceConsumer.exe. See "Maintaining Your Catalog" in the *Polaris Cataloging Guide 4.1R2*.	No	Weekly (when enabled)

Administration Shortcut Keys

This appendix contains charts with the shortcuts you can use with Polaris administration workflows. The cards are designed to be photocopied, trimmed, and put into transparent sleeves that can be attached 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

Navigation Actions

Previous attribute or folder	**UP ARROW**
Next attribute or folder	**DOWN ARROW**
Previous tabbed page	**LEFT ARROW**
Next tabbed page	**RIGHT ARROW**
Shift views	**TAB**
Move cursor to previous word	**CTRL+LEFT ARROW**
Move cursor to next word	**CTRL+RIGHT ARROW**
Scroll tree view down	**CTRL+DOWN ARROW**
Scroll tree view up	**CTRL+UP ARROW**
Jump to top of tree view	**CTRL+HOME**
Jump to bottom of tree view	**CTRL+END**
Expand a folder in tree view	**ALT+*** (on number pad)
Beginning of line	**HOME**
End of line	**END**
Previous screen	**PAGE UP**
Next screen	**PAGE DOWN**

Edit Actions (Keyboard)

Delete highlighted text	**DELETE**
Delete character on left	**BACKSPACE**
Delete character on right	**DELETE**
Delete the word on left	**CTRL+BACKSPACE**
Delete the word on right	**CTRL+DELETE**
Cut highlighted text	**CTRL+X**
Copy highlighted text	**CTRL+C**
Paste text	**CTRL+V**
Toggle overwrite and insert mode	**INSERT**
Undo last action	**CTRL+Z**
Redo last action	**CTRL+Y**

Select Actions (Keyboard)

Select to end of word	**CTRL+SHIFT+RIGHT ARROW**
Select to beginning of word	**CTRL+SHIFT+LEFT ARROW**
Select to end of line	**SHIFT+END**
Select to beginning of line	**SHIFT+HOME**
Select entire tag	**CTRL+SHIFT+DOWN ARROW**
Select multiple lines	**SHIFT+DOWN ARROW**
Select or extend a block of text	**SHIFT+ARROW KEYS**

Table Actions

Modify an entry	**ENTER**
Delete an entry	**DELETE**
Insert an entry	**INSERT**
Cancel	**ESC**

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