POLARIS
INTEGRATED LIBRARY SYSTEM

Preparing for Polaris®: Polaris Glossary

This document defines some Polaris terms for new Polaris customers.

POLARIS
LIBRARY SYSTEMS

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In This Guide

This guide covers the following topics:

Glossary

access point	A searchable key or index to a record or set of records.
association	A relationship between two or more patron records that allows users to open one patron record and access other linked patron records. A patron record can be associated with an unlimited number of other records in a one-to-many relationship. You can optionally create a blocking relationship, in which a "parent" record is blocked when an associated "child" record is blocked.
authority control	The consistent use and maintenance of forms of names, subjects, uniform titles, etc. used as headings in a catalog. This process creates a link between bibliographic records and the authority file, providing the underlying structure of the catalog.
authority record	A cataloging record that refers to specific name headings, subject headings, series, and uniform title headings in bibliographic records. It lists the cross-references to be made to and from the established heading and cites the sources consulted in establishing the heading. A MARC record containing value "z" in Leader/06.
bib-level hold	See *title-level hold*.
bibliographic record	A primary Polaris cataloging record, also called a MARC or title record. Bibliographic records can contain all or some of the following information: title, main entry, subject headings, classification and call number, and description.
block	Polaris term for the condition you may know as "stop." A block interrupts the check-out, renewal, or placement of a hold under certain conditions in Polaris. A block notification message appears. Library staff can override certain types of blocks to continue with the transaction.
Borrow by Mail	Licensed Polaris feature. Staff members and patrons can request library materials and have the requested materials delivered by mail. Libraries can restrict Borrow by Mail options by patron code, establish a fee for the service, and allow exceptions to the fee for some patrons, such as homebound patrons.
borrower	See *patron*.
branch	Part of a library system, usually in a separate physical location. In Polaris, both the main library and other member libraries are referred to as "branches."
charge	See *check-out*.
check-in	Polaris term for the process you may know as "discharge" or "return."
check-out	Polaris term for the process you may know as "charge" or "loan."

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

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

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

control number   A unique number assigned by an agency. For example, Library of Congress puts its control number in MARC tag 010 in the bibliographic record. National Library of Medicine puts its control number in tag 016. Records in Polaris have the control number in the 001 Current System. When records are imported into Polaris, whatever is in 001 is moved to the 035 field, so the Polaris control number can be put in the 001 field.

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

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

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

discharge   See *check-in*.

duplicate detection (bibliographic, authority)   Polaris processes that control whether imported records overlay existing records and what tags are retained.

duplicate detection (patron)   Polaris process to ensure that each patron is registered only once and that patron barcode numbers are not duplicated.

EDI Electronic data interchange; licensed Polaris feature. Once you have implemented EDI with a vendor or vendors, your library can send electronic purchase orders and receive acknowledgments and invoices electronically using electronic data interchange (EDI) and Polaris Acquisitions. With enriched EDI, when the supplier processes the Enriched EDI order, a file containing full bibliographic records with embedded holdings data is produced.

End-Of-Term dates Limits that prevent items from falling due past specific dates, even if the actual loan period is longer. Patrons with certain patron codes can be exempt from end-of-term due dates. Often used by school and academic libraries.

ephemeral item circulation See *Quick-Circ*.

ExpressCheck Polaris ExpressCheck is a self-check station where patrons can check out and renew items and view their accounts using the Polaris ExpressCheck touch screen. ExpressCheck communicates directly with the Polaris application and database. See also *SIP*.

express registration Entering patron information during the check-out process as a service to new, unregistered patrons.

Fee Descriptions Reasons for charging a patron other than overdue fines. For example, patrons might be charged for photocopies, equipment use, lost items, or damaged items.

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

first available copy requests Hold requests for specific issues of a serial title (such as the May 2009 issue of *Horticulture Magazine*) or specific parts of a multi-part title (such as the first season of a television series on DVD). Any copy of the requested issue or part will satisfy the request. Contrast with *item-level hold*, which can only be filled by one specific physical item.

floating collections The ability to allow certain items to remain at the branch where they were last checked in. If an item is called to another branch, for example to fill a hold request, the item may stay at that branch when it is returned. The items move among branches as they are used, not according to a rotation schedule. Floating collections allow high-demand items to remain at high-traffic organizations, and collection contents to change with demand. They also reduce the cost of returning materials to a single starting point after each use at another branch.

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

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

group (holds)   Two or more related hold requests for the same patron, with a status of active, inactive, or pending, can be grouped when a patron wants any one of several requested titles. When one request is filled, the others are deleted.

group (permissions)   Used to assign permissions to several staff members or workstations. All members of a group have the permissions to which the group is assigned. Groups combine workstations and staff members who perform the same functions in the library.

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

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

hold slip   A hard copy record printed when an item is trapped (held) at check-in or renewal for a patron, and placed with the held material for identification purposes. Polaris offers several types of hold slips.

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

homebound   See *Borrow by Mail*, *Outreach Services*.

index   An organized list that designates the contents or topics in a database or databases; contains entries or codes that can be used to identify and retrieve a record.

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

In transit for hold   When an item's status changes to Transferred to fill a request, the in-transit slip includes the text FOR HOLD. (The text does not appear on in-transit slips printed when an item is checked in and just needs to be shipped back to its assigned branch.) See also *In transit*, *Transferred*.

item   A single physical piece owned by a particular library or agency, represented in Polaris by an item record. An item may be a copy of a book, serial, abstract, article, audio book, or microfilm.

item record	A cataloging record that identifies a particular item in the library collection. Item records are generated during standard cataloging operations, on-the-fly circulation, release of a purchase order, or serial check-in. An item record contains the material type, collection, fine rate and loan period, as well as other pertinent information for the particular item
item blocks	The blocks that a staff member may place on an item record to "flag" a particular condition. For example, a branch may have staff-initiated item blocks for Send to Cataloging, Send to Tech Services for Repair, and Kit: Check All Parts.
item group	See *record set*.
item-level hold	A request for a specific item when only that item satisfies the request. Example: Several items are linked to the bibliographic record, but only a specific item, a large-print copy, satisfies the request.
Item Statistical Class codes	Branch-defined item descriptions used for reports. For example, a branch may define codes for Dewey Range (1=000-099, 2=100-199, 3=200-299, etc.). Another branch may define codes for Reading Level (1=Grades K-5, 2=Grades 6-12, 3=Grades 12+).
library	A political entity consisting of one or more branches. In Polaris, a library is a part of a system.
loan	See *check-out*.
location	See *branch*, *library*, *system*.
Loan Interval Codes	The length of time for the loan period. The Loan Interval Codes are used to set standard loan intervals, and in combination with Patron Codes to set loan interval exceptions. Because of the structure of the loan matrix in Polaris, Loan Interval Codes are grouped by types of materials (materials that have common circulation rules). As a result, each code will be characterized by a logical group of materials that share the same fining policy.
MARC validation	In Polaris, MARC records are validated according to rules defined in Polaris Administration. These rules are applied when new records are created, and when existing records are saved or checked for MARC format. They are also applied to imported records when the option to perform MARC validation is selected in the import profile.
Material Types	The item-level codes that the library assigns to specific physical material types, such as books, videos, audiotapes, and other materials. Material Types have multiple purposes. For example, they are used to limit the number of items a patron can check out or request. Also, they can be used for gathering statistics for reports. See also *Type of Material (TOM)*.

notification types	Polaris includes the following notice types: overdue notices (1-3); bills; fine notices; request pick-up notices; cancelled request notices; reminders; combined notices that can include overdue, bill, and request notices going to the same patron; serial claim notices; serial routing notices. Delivery methods include print for mailing, e-mail, telephone, and text message to mobile phone.
offline circulation	Doing circulation transactions while disconnected from the Polaris server. When the offline period is over, the transaction information is uploaded to Polaris and the database is updated.
on-the-fly item record creation	Entering basic item information to create a minimal-level item and bibliographic record, according to pre-defined on-the-fly (OTF) templates. This allows an item to circulate immediately without full cataloging.
Outreach Services	Licensed Polaris feature. These functions automate title selection and delivery to homebound and other designated patrons, and allow individual patron profiles based on reading preferences, delivery mode, and other characteristics. You can have Polaris generate selection lists for individual patrons, or manage outreach services for multiple patrons, based on the next scheduled delivery date or delivery route.
PAC	The online public access catalog. A software application intended for patron use, allowing a user to search the library online catalog and other databases, place requests, access the patron account, and use other features the library may implement.
patron	The person using the library resources. A patron registered at a specific library is represented in Polaris by a patron record.
Patron Blocks	The blocks that a staff member may place on a patron record to "flag" a particular condition. For example, a branch may have staff-initiated patron blocks for Lost and Found and See Director.
Patron Codes	The codes that the library assigns to identify different patron groups. For example, the library may have patron codes assigned to adults, juveniles, students, senior citizens, or other groups. Patron codes are used for setting circulation rules and gathering statistics.
patron record	A Polaris patron services record that contains information about the patron, including name, address, registration location, and notification data.
patron registration fields	See *User Defined Fields*.
Patron Statistical Class Codes	Branch-defined information codes used to enhance reports (for example, Adult Resident, Adult Non-Resident).
permissions	Set in Polaris Administration, these control who can do specific actions at an organization. Both staff and workstations must have the appropriate permissions to be able to perform specific tasks.
purchase requests	See *selection lists*.

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

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

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

record A discrete information unit in a database.

record set Records of the same type (bibliographic, item, or patron) grouped in a retrievable file, on which you can perform common tasks.

request Requests can be for materials owned within the library system (see *hold request*), or for materials owned by other organizations (ILL or inter-library loan).

Requests-To-Fill (RTF) processing Polaris sends hold requests to designated libraries in a specified order. A library chooses to fill or deny the request. The request is routed until it is filled, it expires, or every library denies it.

reserve See *hold*.

results or results set A collection of one or more records found as a result of a search.

return See *check-in*.

search n. A series of commands intended to satisfy a request for information.
v. The process of retrieving results from a database or information resource to satisfy an information request.

selection lists Used in Polaris Acquisitions to assemble a list of titles that the library may purchase at a later date. Titles can be added to a selection list one at a time, or they can be bulk added from a bibliographic record set. After the appropriate selector reviews the titles, the selection list line items can be given a status of Approved, Consider, Desiderata, or Rejected.

serial holdings records	Serial holdings records are linked to the bibliographic record for the serial title in the Polaris database. The publication pattern (enumeration and chronology) is defined in the serial holdings record. Each copy of the serial title has a separate serial holdings record with a distinct copy number. Records for subscription issues or standing order parts are created automatically from the publication pattern that predicts their arrival.
Shelf Locations	Define subsets or different locations of the materials within a branch. Shelf Locations are usually used together with Collections hierarchically (for example, Collection - Reference, Shelf Location - Children's Reference). Shelf Locations can be shown, along with call number and collection, in an item display in the PAC.
SIP	Communication protocol used between Polaris and devices such as third-party self-check systems. See also *ExpressCheck*.
special loan period	A manually assigned length of time that an item can be checked out, different from the regular loan period for the item.
staff client	The Polaris software application used by the library staff, including the Administration, Acquisitions, Serials, Cataloging, and Patron Services subsystems.
Standard Loan Period	The most common loan period used by a branch. The Standard Loan Period is used only in offline circulation, or when the loan period in an item record is missing or faulty. In all other cases, Polaris uses the Loan Interval Code in the item record to calculate the due date.
statistics-only check-out	See *Quick-Circ*.
stop	See *block*.
system	A single library or group of libraries using one Polaris system installation. A system can consist of one library (single branch or multiple branches) or several libraries (in the case of a consortium).
title-level hold	A request for a title when any item attached to the bibliographic record satisfies the request.
Transferred	Item circulation status. Transferred items are items that have been sent to another library to satisfy a hold request.
trapping holds	An item is said to be trapped for a hold when an item that fills a request is scanned at circulation and the system links the item to a specific request, either automatically or by displaying a message that prompts you for a decision.
Type of Material (TOM)	Bibliographic-level format indicator derived from the LDR/06, LDR/07, the 006 tag, the 007 tag, and other combinations of codes. This generates the format icon in the PAC and enables searching for bibliographic records using the TOM in the staff client and PAC. See also *Material Types*.

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

workform The primary window in Polaris, where you view, enter, and edit data.

For More Information

The following information resources can help you set up and use Polaris to full advantage in your library system.

Polaris Documentation

The entire set of Polaris customer documentation is available in PDF format. These guides explain Polaris concepts, workflows, and procedures. Contact your Implementation Manager. You can also download the PDF files from the Polaris Library Systems Customer Extranet.

Customer Extranet

Connect to the Polaris Library Systems Customer Extranet for updated documentation, articles, and customer support information about Polaris. Your Implementation Manager supplies the password you need to log on to the Customer Extranet from www.polarislibrary.com.

AccessPolaris Forums

Polaris Library Systems maintains AccessPolaris Forums, which allow you to exchange information online with other Polaris users. Go to:

www.polarislibrary.com/forums

Contact your Implementation Manager for instructions on subscribing to AccessPolaris Forums.