



Marigold Polaris Manual

An overview on the public
services/front desk functions
in Polaris

www.marigold.ab.ca/PD
January 2016

Marigold Polaris Best Practices Manual

Last Update: January 2016

This manual provides an overview on the public services/front desk functions in Polaris. More information is also available through the Marigold website: www.marigold.ab.ca/PD

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Help Menu

The Polaris Help Menu contains the most up-to-date information about Polaris. Explore the help menu from the main Polaris Bar or any workflow by clicking the question mark icon or from “Help → Polaris Topics.” The help menu can be browsed through a table of contents, searched by keyword or you may search the index.

The Help Menu contains information for Polaris users with all levels of permissions. This means that you may not have the permissions to modify/access certain features in Polaris. Ask your Library Services Consultant about any Polaris features you are unable to access/change (such as Policy Tables, Administrative Features, Cataloguing features).

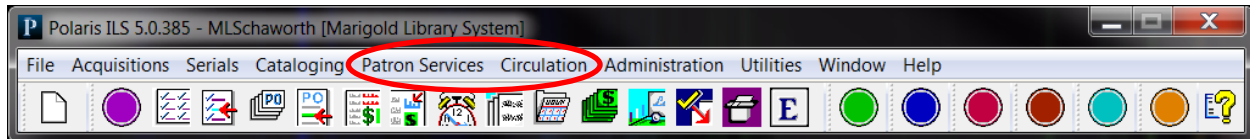
You can use the Favourites in the Polaris Help Menu to create a manual for yourself! You may add any topic you wish; favourites are personal to your account.

TRAC Operational Guidelines

The TRAC Operational Guidelines are renewed annually by the TRAC Advisory Council and contain guidelines for resource sharing, materials, damaged and lost materials payment, missing and in-transit items, and contacting patrons. They are posted on marigold.ab.ca/PD.

Patrons

Search for patrons under **Patron Services** or **Circulation**. You may search by barcode, first name, last name, library, etc., by using the “Search by” drop down menu. When searching by Name (Last, First Middle) you must place a comma and space between last and first name (e.g., Rowling, J). Searches are not case sensitive.



Patron Record

Contains information about the patron and their library activities. Accessed from the **Patron Services** menu

Access the patron record for:

- Patron renewals & address checks
- Updating patron’s personal information (e.g., address, phone number, e-mail, notification options)
- General overview of patron information (e.g., patron code, items out)
- Enabling or disabling reading history

Patron Status

Contains information that changes as the patron uses library services. Accessed from the **Circulation** menu.

Access the Patron Status workflow for:

- Items out
- Renewing items
- Changing an item to lost
- Information about blocks or notices
- Monetary transactions (fines, account credits, payment/transaction history)
- Claims
- Hold requests
- Reading histories
- Associations
- Notes
- Patron Messages

Quick Tip: You can travel quickly between a patron’s “Patron Record” and “Patron Status” by using the **Links** menu in either workflow.

Patron Registration

TRAC residents may register for a card at any TRAC library. See the **TRAC Guidelines, “Operational Guidelines for Patron Registration and Renewals”** for important information about registering patrons.

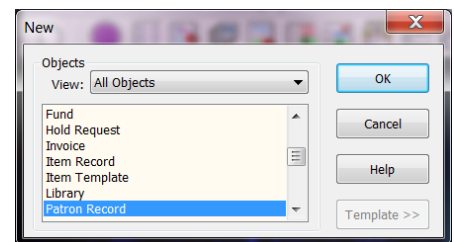
Follow these steps to register a new patron:

Part 1: Check for Duplicate Records

- 1) Before registering the patron, check for duplicate records in Polaris. The patron may have previously registered for a card at a different TRAC location.
- 2) Open the **Find Tool** (Patron Records Menu) and search for a matching patron record using the patron’s surname and first initial (e.g., Rowling, J). This way, you will find entries that may have variations in the way the first name was entered (e.g., Stephanie versus Steph).
- 3) If a duplicate record is found **do not** create a new record; proceed to Part 3.
- 4) If no duplicates are found create a new record (Part 2).

Part 2: Create a New Patron Record

- 1) Open a new record (File + New, or click the “new” icon).
- 2) Select “Patron Record”.
- 3) Scan a new barcode into the barcode field.
- 4) At a minimum fill out the following information in the patron record:



Last name

First name

Registered at

Patron Code

→ Patron codes control a patron’s borrowing privileges. Most patrons receive a “Standard” patron code. Other commonly used patron codes are “Non-System” for patrons who do not live within TRAC and “Print Disabled” for patrons who have self-identified as having a print disability.

Expiration date/term

→ Default is one year

Address check/term

→ Default is one year

Statistical Class

→ Default is Standard

Notification option

→ Patrons may be notified by mail, phone, text or email. Patrons who chose a text-notification must provide their phone number and cellphone service provider.

Notification field

→ Remember to select the “TXT” checkbox for patrons who have requested text message notifications.

Switch to  tab:

Password/PIN

→ Enter the last 4 digits of the patron’s phone number or ask them to provide a 4-digit numerical PIN. Patrons use their PIN to access eResources and their TRACPac account.*

Where They Live

***Note:** Patrons who are not residents of TRAC may **not** access eResources. For these patrons, choose the patron code “Non System” and **do not** enter a password/PIN in their profile.

- 5) Ask the patron if they would like to maintain a reading list. If so, click the “Maintain reading history” box.
- 6) Your library may require additional fields. Fill in those required and save the patron record.

Part 3: Modify an Existing Patron Record (for patrons who have moved within TRAC)

Patrons who have previously registered at another TRAC Library do not need a new patron account. Open their existing account from the **Patron Services** menu (“Patron Records”) and make the following changes:


- 1) Verify or change their personal information (name, address, contact information, where they live, etc.)
- 2) Choose your library from the **Registered at** menu.
- 3) Ask if the patron still has their existing card. If they do not, provide a new TRAC card and scan the barcode in the **Barcode** field.
- 4) Save and close the patron record.

Part 4: Set up Associations (Optional)

If you are registering a family or group, you can associate their accounts within Polaris. This feature allows front desk staff to quickly travel between patron accounts. e.g., if a family of five comes to the circulation desk, you can travel between their accounts without requiring each patrons’ card or looking them up individually.

Note: Associated patrons **cannot** see each other’s accounts.

Associations are set in the Patron Status workflow. To set up associations:

- 1) Create a Patron Record for each member of the family/group (e.g., Harry Potter, Lily Potter and James Potter).
- 2) Open one family member’s Patron Status workflow from the **Circulation** menu (Harry Potter’s).
- 3) Enter the “Associations” workflow by selecting the family portrait icon on the side-bar 
- 4) Add each association using the “+” sign.
- 5) Save and close the record.
- 6) Repeat for each family member.
→Associations are reciprocal, so for the next family member you do not need to add Harry Potter.

Information for New Patrons

After registration, take the opportunity to inform patrons about the variety of services available through your library, Marigold & TRAC. Ensure patrons are aware of:

- How to access their online account on tracpac.ab.ca using their barcode & PIN
- Where to access eResources from the library's website, marigold.ab.ca or from TRACPac
- Where their TRAC card can be used and how they can use their card at any public library in Alberta by registering for ME Libraries (melibraries.ca)
- The variety of eResources offered e.g., eBooks, downloadable audiobooks, digital magazines, downloadable music, research databases, etc.
- How they can stay informed about local library programs or RISE programming
- Reminder notices are only sent by email or text. Notifications will be sent in the following circumstances:
 - A hold is available for pick-up.
 - Patron registration is about to expire.
 - An item is almost overdue – 2 days prior to due date, an Almost Overdue notice is sent.
 - An item is 10 days past due date - 1st Overdue Notice is sent
 - An item is 21 days past due date - 2nd Overdue Notice is sent
 - An item is 45 days past due date – a Billing Notice (billing notice is sent to the billing notice queue if both first and second notices have been posted. *The bill is sent by mail*).

→For promotional materials such as brochures visit www.marigold.ab.ca/PD or contact Caleigh Haworth (caleigh@marigold.ab.ca)

Patron Status Workform

The Patron Status workform contains information that changes as the patron uses library services. It is accessed from the **Circulation** menu or from the “Links” menu in the Patron Record. Most day to day functions are done using the Patron Status workform. The different sections listed below are accessed from the side-bar of the Patron Status workform. Hover over the icons to see their name.

Items Out

- View current items out
- Renew items
→ An item may only be renewed if there are no holds on the item. See the TRAC Guidelines for more information.
→ Items from other libraries can only be renewed once over the limit.
- Set special due dates
→ Refer to the TRAC Guidelines before extending the due date of items from other libraries.
- Make claims (e.g., a patron claims they have returned or never received a book on their account)
- Set a book to “lost”*
- See notification history of an item

Account

- Add fines/fees to an account
- Pay/Waive fees/fines
- Credit a patron’s account
- View monetary transactions that have occurred

Claims

- View any current claims (claim returned, claim never had)

Requests

- View or modify existing holds.
→ See “Modifying Existing Holds” section of this manual.

Reading History

- View or print patron’s reading history.
→ Only view/print a patron’s reading history at their request.

Associations

- View records associated with the patron (i.e., family members).
- Double click on associations to open their profile.
- Create new associations.
→ Associated patrons **cannot** access each other’s accounts.

Notes

- Add/modify notes
- Non-blocking notes
→ Use a non-blocking note to record general information about a patron
- Blocking notes
→ Blocking notes pop-up at circulation and can be used to inform front-desk staff of important information (e.g., that a patron has been banned or has forgotten their coat at the library)
- Messages
→ Messages are sent to a patron through TRACPac, like an email.

* Items that have a status of **Lost** were checked out by a patron and lost. **Missing** items were lost from the library without being checked out (e.g., lost in transit).

Circulation

The check in and check out tools are accessed from the **Circulation** menu.

Check In

To check in an item, scan the item in the **Item barcode** field. You may encounter different messages as you check in items such as:

- An item is on hold for your patron
- An item belongs to another library and should be shipped back
- An item was lost/missing
- An item has overdues

Bulk Mode Check In

You can use bulk mode check in to prevent pop-up messages from showing. This is helpful for libraries that do high volumes of check ins. Normal check in is used by most TRAC libraries.

Grace Days

Every item receives a one day grace day on for overdue fines, i.e., any item can be returned one day late without accruing overdue fines.

Free Days

You can set free days for a check-in session if your library has been unexpectedly closed, e.g., there was a snow storm and you were unable to open for two days. Free Days prevent fines from accruing on those days, e.g., if Free Days are set to five an item will not accrue overdue fines until it is six days overdue. You do not need to use Free Days for regular or scheduled closures.

Contact your Library Services Consultant to schedule *planned* closures in Polaris (e.g., Christmas closures). Free Days are not required to use if a closure has been planned and entered in Polaris by HQ staff.

Check Out

- 1) Scan the patron's card in the **Barcode** field or search for their record by selecting Find.
- 2) A patron may be blocked due to overdues, expired registration, etc.
 - You can choose to allow the patron to borrow or rectify the block before proceeding (e.g., renew the patron's registration or ask for their fines to be paid).
 - Your library may have local policies that apply
- 3) Scan the item(s) in the **Item barcode** field.
- 4) After each item is scanned press "Enter" on your keyboard to end the session.

Quick Tip: You can set special loan periods for items from the **Loan Period** box. Set the special date **before** scanning the items. This can be used for patrons who request extended loan periods.

Filling Holds

A list of holds that can be filled by your library is generated for each day you are open. Access and print the list of requested items from the **Request Manager** under **Circulation**.

- 1) Open the request manager each morning you are open.
- 2) Sort the list to your preference (e.g., by call number, shelf location, etc.)
- 3) Print the list using the print icon. List-view will print the list in an easy to read format.
- 4) Pull each item from your shelves.
- 5) Check in each item to change its status from “In” to “Shipped” and package the item to be sent to the prompted library. See the **TRAC Operational Guidelines**, “**Operational Guidelines for Materials**” for information on how to package materials for shipment.

If you are unable to find an item on your request list:

Change the item’s status to “Missing” from the item record. Missing items will not be requested to fill holds and will be deleted automatically by headquarters after a set time. If the item is found, its status will change to “In” once it has been checked in.

Note: In addition to filling holds from the Request Manager when you are open, a staff member should run “Lost Holds” reports on a regular basis. See the MLS Polaris Reports Manual or contact your Consultant for more information. www.marigold.ab.ca/polaris-simplyreports-resources

Placing Holds

Holds can be placed from many workforms in Polaris (e.g., from Check Out, Patron Registration, Patron Status, Item Records, etc.).

To place a hold from any location, look for the blue-book icon.



Pressing the blue-book icon from any workform will open the holds workform. Depending on what window you came from, information may be automatically filled into the workform but can be erased.

To place a hold:


- 1) Scan the patron’s barcode into the **Barcode** field or find their record by selecting “Find”
- 2) Enter the item information by clicking “Find” in the **Title** information.

Note: Place holds on **Bibliographic Records (BIB)** not **Item Records**. BIB Records correspond to a work as a whole, while item records are for a library's unique copy. e.g., there is a BIB record for "Twilight" the book and each library that has a copy has an item record for their copy. Placing the hold for the "Twilight" BIB record means your patron will receive the first copy available. Placing the hold for an item record of "Twilight" means the patron will need to wait for that particular copy to become available.

- 3) Chose the BIB record you'd like to place a hold on. Often, there will be more than one option. Chose the option that has the most "Linked Records" (items) available or in the format your patron requires (e.g., large print).
- 4) If the patron would like to receive their item at another library, change the **Pickup** location to the TRAC library they request.
- 5) Save & close the holds workflow.


Placing Multiple Holds at Once

If a patron has requested multiple holds, you may place them simultaneously from the holds workflow using the **Multi-request** tool.

- 1) Open the holds workflow by clicking the blue-book icon.
- 2) Click the triple "+" icon to enter the **Multi-request** tool on the sidebar. 
- 3) Enter the patron information and pickup location.
- 4) Add each title using the "+" sign under **Titles**.
- 5) Save & close.

Quick Tip: You can also use the **Multi-request** tool to place holds for multiple patrons at once. e.g., For book clubs: enter each patron under the **Patrons** field and the book-club book under **Titles**, this will place a hold on each patron's account.

Modifying Existing Holds

To modify or view information on existing holds, go to the Patron Status workflow and select the "Requests" icon. 

From here, you can view the patron's current place in the queue and other information about the hold, including its status. Double click on any hold to view more detailed information, access the holds queue and more.

Viewing the Holds Queue

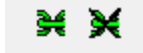
To view the holds queue, double click the item from the "Requests" workflow. This will open the holds workflow for that item. To view/modify the holds queue select "Holds Queue" from the **Links** menu.

Grouping Holds


Holds can be grouped from the "Requests" section of the Patron Status workflow. Grouping holds means that receiving one hold from the group will cancel the other requests.

e.g., A patron would like to read *Pride and Prejudice* in any format (large print, paperback, audiobook). A hold is placed for the paperback, audiobook and large print version and the holds are grouped. The audiobook is the first to arrive and the other holds are automatically cancelled.

Use the “chain link” icon from the “Request” window to group or ungroup holds.



Quick Tip: If a hold in the “Requests” workform has an “i” icon beside it, the hold is for a specific item not a BIB record.

 Various, a... FOR TRAINING PUR... Book

Hold Statuses

Hold statuses change automatically. **It is important to check in ALL items received in the library, as this causes statuses to change** (e.g., in-transit or out, to held). The most common hold statuses are:

Pending

→The hold has been placed and the patron is in line.

Active

→A copy is available at a library and is being pulled off the shelves.

Cancelled

→The hold has been cancelled. Cancelling a hold causes a notification to be sent to the patron.

Held

→The item is ready for pickup at your library. The patron will be notified automatically.

Shipped

→The item has been shipped to fill a hold at *another* library in TRAC

In-Transit

→The item is being sent *back* to your library (it had fulfilled a hold at another library)

Unclaimed

→The patron did not come to the library to claim their hold within 7 days.

Item Records & Bibliographic Records

All library materials have an item record and a bibliographic (BIB) record. Both can be searched from the **Cataloguing** menu and can be used by front-desk staff for different purposes.

BIB Records

Are used for cataloguing purposes and corresponds to an item as a whole (e.g., “Lords of the Rings: Two Towers”).

- View the MARC record for an item
- See what an item looks like in TRACPac (from the PAC section of the BIB record)
- Access read-alike suggestions for reader’s advisory from the PAC preview
- View the circulation statistics for an item as a whole
- Place a hold for a patron

Item Records

Are associated with a library’s particular copy of an item (e.g., your library’s copy of the Lord of the Rings: Two Towers)

- View the current status of a specific item (shelving, in, out, missing) or change an item’s status
 - You can only change the item status if an item is currently checked in and belongs to your library
 - Withdrawn & Missing items will be automatically deleted by headquarters after a set time
 - Change an items status to “Unavailable” before sending it in for cataloguing corrections or reassignment
- Change a shelving location
- Add a note to an item, such as a damage note
 - See the **TRAC Notes Procedure** for more information
- View statistics for that specific item
- View the last borrower of an item

For training on adding item records for mass-market paperbacks and serials, contact your Library Services Consultant.

Quick Tip: You can travel quickly between BIB records and their corresponding item records using the “Links” menu.

Polaris Search Tips: The Find Tool

The search box in Polaris is called the “Find Tool.” Choose the criteria you wish to search by from the “Search by” menu. e.g., you can search by Title, Author, Subject, etc. “All keyword fields” will search all fields and is a good field to use as a default. Searches are not case sensitive.

You can limit your search by material type, assigned branch and many other features using the different drop down menus.

You can use the * to truncate your search terms. Tsunami* will show results for tsunami (singular) as well as tsunamis (plural).

When you search in Polaris only a small number of results will load automatically. Always press CTRL+Shift+A after a search to load ALL search results.

Other Resources & Training Opportunities

Visit the Marigold website www.marigold.ab.ca/PD for resources on:

- Community Profiles
- eResources
- ME Libraries
- Polaris
- Simply Reports
- TRAC Guidelines & Procedures
- Website template
- VDX

Contact your Library Services consultant for help or to schedule in-person/videoconference training.