

POLARIS CATALOGING

The Anatomy of an Item Record

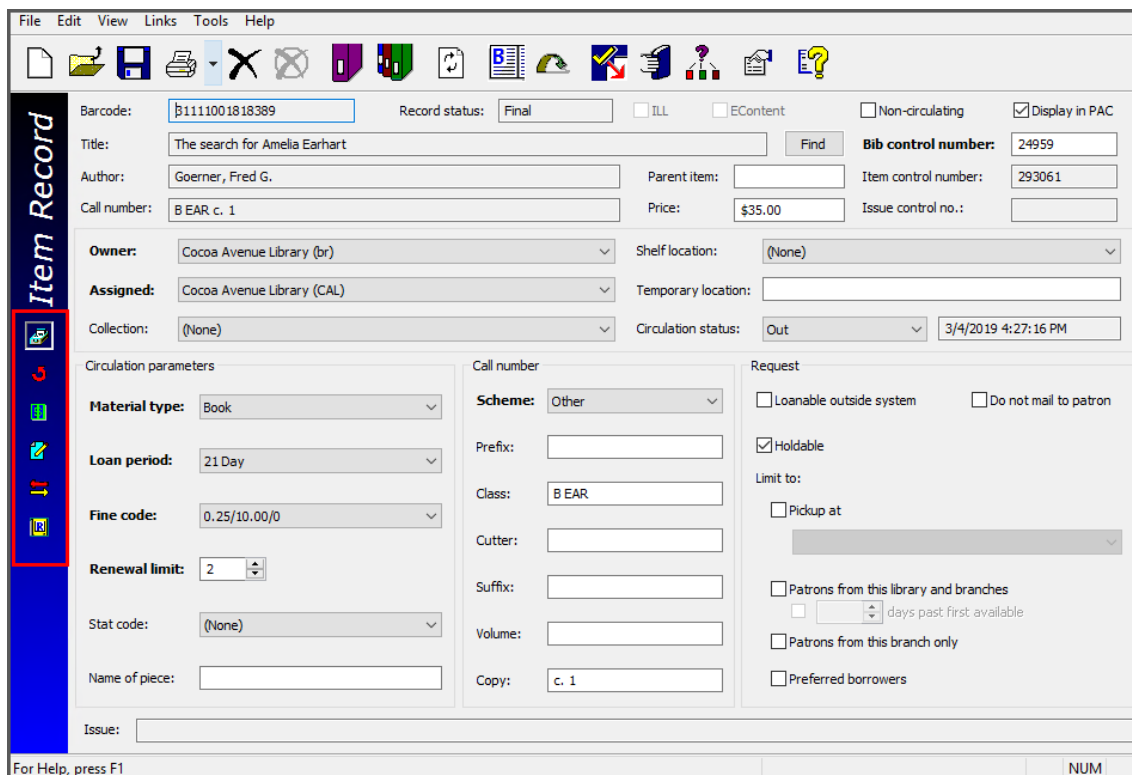
What is an Item Record

An item record represents a physical or eContent unit, it can also represent a unit of a title on order. An item record cannot exist on its own, it must be attached to a bibliographic record.

The Item Record workform includes cataloging, circulation, notes, notice history, and source information for an item record. If your library uses course reserves functionality, the Item Record workform includes reserve circulation information and linked course reserve records.

Item Views in Polaris Client

- Cataloging
- Circulation
- Source and Acquisitions
- Notes and Notices
- History



File Edit View Links Tools Help

Barcode: Record status: ☐ ILL ☐ EContent ☐ Non-circulating ☒ Display in PAC

Title: Bib control number:

Author: Parent item: Item control number:

Call number: Price: Issue control no.:

Owner: Shelf location:

Assigned: Temporary location:

Collection: Circulation status:

Circulation parameters

Material type:

Loan period:

Fine code:

Renewal limit:

Stat code:

Name of piece:

Issue:

Call number

Scheme:

Prefix:

Class:

Cutter:

Suffix:

Volume:

Copy:

Request

☐ Loanable outside system ☐ Do not mail to patron

☒ Holdable

Limit to:

☐ Pickup at

☐ Patrons from this library and branches

☐ days past first available

☐ Patrons from this branch only

☐ Preferred borrowers

For Help, press F1

NUM

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Cataloging View

The first view of an item record is the cataloging view

- A individual staff level profile can be set so that items always open to this view for catalogers
- White fields may be edited, gray cannot
- Bolded fields must be filled in to save the workform

Circulation View

This view shows circulation info, including:

- Current borrower
- Last borrower
- Held for patron
- Last circulated
- Due date

Source and Acquisitions View

The Source and Acquisitions view includes:

- Donor & fund info
- PO and invoice numbers
- Circulation statistics
- Many fields are populated automatically if the item came through the acquisitions process
- The First Available date field is the date that this item became available for check out

Notes and Notices View

This view of an item record holds various notes, notice information and blocks.

- Catalogers can add a library assigned block or a free text block
- Both types of blocks will pop up whenever the item is checked in or out
- If a note is present, the icon turns yellow
- If blocks are present, the icon turns red

History View

The History view of an item record shows each time an item record has been touched.

- Information logged here includes User ID and workstation
- By default this history is saved for a year
- Patron ID may be included in history per a System Administration setting

Course Reserves View

A Reserve Item Record is a special view of the item record linked to a course reserve record.

- Information regarding the reserve item is stored in a reserve item "record."
- Item on course reserves Information such as assigned branch, assigned collection, shelf location, loan period code, fine code, renewal limit, and holds information. These settings can be different from those in the primary item record.
- Copyright information - If the material is copyrighted, and there is a fee, you can indicate that the fee was paid.
- Ownership information about the item - Copy owner could be library or instructor

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- Linked course reserve item information. You can see the course, the reserve status, the dates of the reserve, and the number of circulations (check outs and renewals) of the item while on reserve for that course.

Item Views in Leap

- Details
- Circulation
- Controls
- Blocks and Notes
- History
- Statistics
- Record Sets
- Notices
- Source and Donors

The search for Amelia Earhart
By Goerner, Fred G.

Barcode: 31111001818389
Call number: B EAR c. 1
Collection: None
Shelf location: None
Owning branch: CAL

☐ ILL ☐ Non-circulating
Record status: Final
Bib control number: 24959
Parent item:
Assigned branch: CAL

☐ eContent ☒ Display in PAC
Issue:
Issue control number:
Price: \$35.00
Circulation status: Out || 3/4/2019 4:27:15 PM

Out

Details Circulation Controls Blocks and Notes History Statistics Record Sets Notices Source and Donor

Material Type*	Loan Period*	Renewal Limit*
Book	21 Day	2
Statistical Code	Fine Code*	Home Branch* <input type="checkbox"/> Do not float
(None)	0.25/10.00/0	Creamery Building Library (MCBL)

Details View

The first view of an item record is the details view. Staff can edit the following fields in this view:

- Barcode
- Collection
- Shelf Location
- Temporary Location
- Owning Branch
- Assigned Branch
- Price
- Circulation Status

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Circulation View

This view shows circulation info, including:

- Current borrower
- Last borrower
- Held for patron
- Last circulated
- Due date

Control View

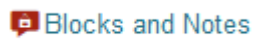
This view displays controls or settings for the item.

- Material Type
- Statistical Code
- Loan rules (loan period, renewals, fines)
- Call number information including volume
- Hold and ILL rules

Blocks and Notes

This view displays blocks and notes associated with the item.

- Staff can add a library assigned block or a free text block
- Both types of blocks will pop up whenever the item is checked in or out
- If a note or a block are present is present, the icon displays a red flag



History View

The History view of an item record shows each time an item record has been touched.

- Information logged here includes User ID and workstation
- By default this history is saved for a year
- Patron ID may be included in history per a System Administration setting

Statistics

This view displays circulation and inventory statistics for the item.

- Year to date circulation
- Previous year circulation
- Lifetime circulation
- In House circulation including previous year and lifetime
- Inventory date

Record Set

This view displays a table listing all the record sets to which the item record belongs.

- Click on a record set to open it in the Item Record Set workflow.

Source and Acquisitions View

The Source and Acquisitions view includes:

- Donor & fund info
- PO and invoice numbers
- Many fields are populated automatically if the item came through the acquisitions process
- The First Available date field is the date that this item became available for check out

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Notices View

This view of an item record notices.

- 1st through 3rd notices sent to patrons
- Hold notice
- Bill

Specifying the Item View

You can specify the view that appears when you first open the Item Record workflow. Setting them at the staff member level can accommodate the workflows of specific staff members. For example, a cataloger may want the Item Record workflow to open to the cataloging view every time she opens the workflow, regardless of whether the workflow is opened to create a new record or an existing item record is opened from a Find Tool results list.

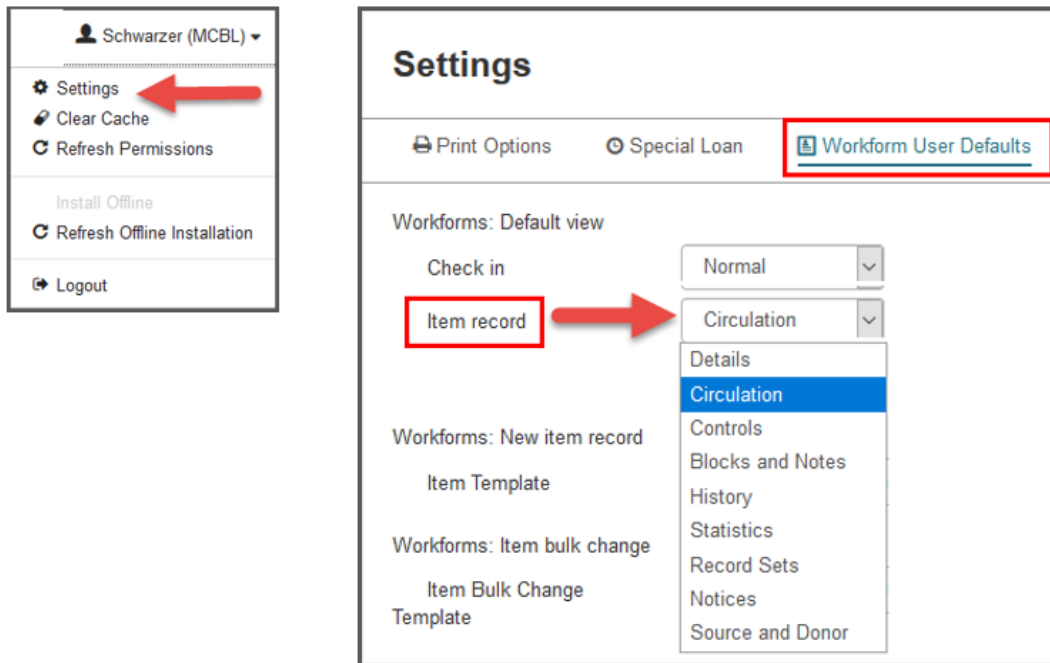
- Polaris Staff Client specify the item view – in the Polaris Administration, select Profiles, then select the Staff Client tab, the Default view selected when item record opened.

The screenshot shows the Polaris Administration interface. On the left, the 'Administration Explorer - System' tree has 'Profiles' highlighted with a red box. The main window displays the 'Profiles' configuration page with the 'Staff Client' tab selected. A table lists various profile settings, with a red arrow pointing to the 'Default view selected when item record opened' setting, which is currently set to 'Cataloging'.

Profile	Value
Client and server version must match	Yes
Client visual alert configuration	Setup . . .
Client/server locale settings must match	Yes
Client/server time discrepancy beyond built-in 5 minute ...	0 (minutes)
Client/server time discrepancy check: Enable	Yes
Client/server time discrepancy violation message	Log-in failure! Client time set
Client/server time discrepancy warning message	Warning: Client time setting i
Default view selected when bibliographic record opened	MARC21
Default view selected when item record opened	Cataloging
Default view selected when patron status opened	Items Out
Display state in address: Patron	Yes
Find tool/record-set-to-record-set creation: Record set s...	1000
Find tool: Default number of records to return in a result ...	1000
Find tool: Filter search results by permission	Yes

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- In Leap specify the item view in – Settings



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