

Training

POLARIS SYSTEM ADMIN

How to Add a Staff Member - Polaris Client

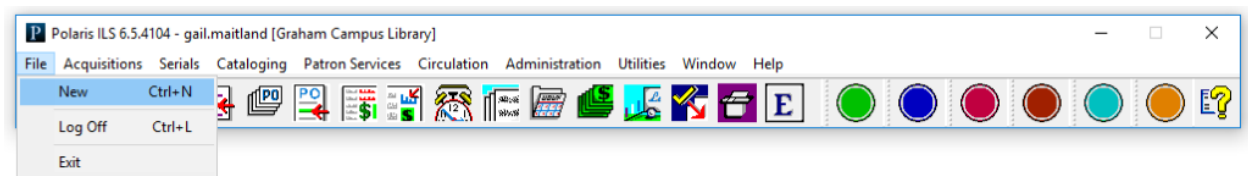
Introduction:

This article explains how to add a new staff member in the Polaris Client

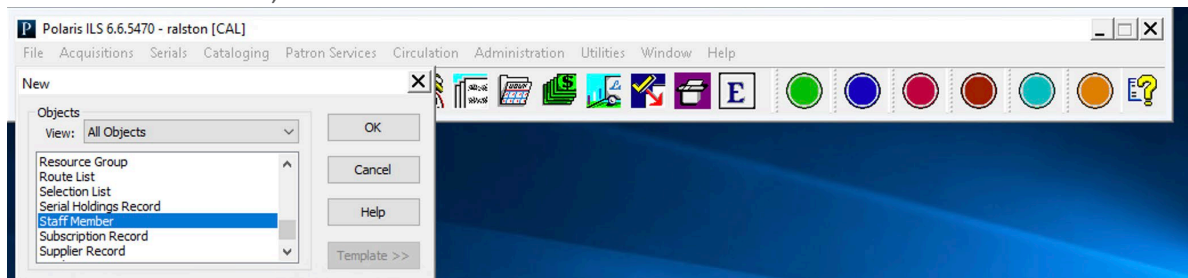
Adding a New Staff Member:

From the Polaris Toolbar select:

File>New



Click on Staff Member, then OK:



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Complete all **bolded** information in the workstation form:

- If the organization is not branch level, you must choose an affiliated branch.
- The name must match the name in Active Directory.
- Email is not required, unless the staff member will receive Ask Us or Self Registration information.

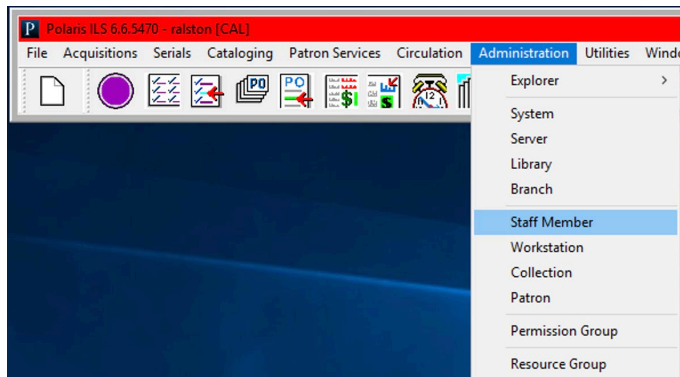
Profile	Value
Acq fund droplist setup	Setup ...
Override acquisitions blocks	No
Override serials blocks	No
Retain material type when copying line item segment data	Yes
Route list defaults	Setup ...
Selection list line item defaults	Setup ...

Click Save, there will be a warning that the staff member has no permissions. After saving, assign the staff member to the correct permission groups, or grant them the permissions needed.

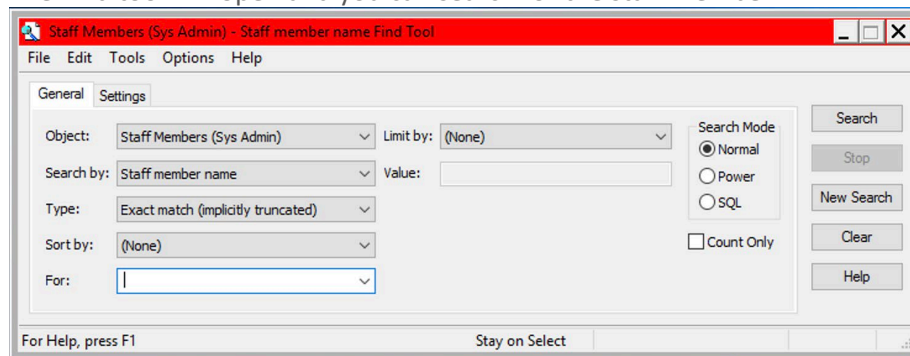
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Searching for a Staff Member:

From the Polaris toolbar select:
Administration>Staff Member



The Find tool will open and you can search for the staff member.



Note: An asterisk (*) will bring up all staff members.

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User	Organization	Type of Organization
PolarisSuperuser	Polaris Library Training System	<System>
PolarisExec	Polaris Library Training System	<System>
OPAC Default	Washburn Public Library	<Branch>
ann.lorish	Ballroom Library	<Branch>
gvandenberg	Vandenberg Library	<Library>
chelberg	Clearfield Public Library	<Branch>
tamasweet	Cabrillo Point Public Library	<Branch>
gbutton	Cocoa Avenue Library	<Branch>
Pinsley	Lauren County Free Library	<Library>
dpharr	Clearfield Public Library	<Branch>
merrill	Washburn Public Library	<Branch>
Patron Registration Email	Washburn Public Library	<Branch>
Ask Us Email	Washburn Public Library	<Branch>
Sobrinio	Washburn Public Library	<Branch>

Double click to open and edit the staff member.

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