

Polaris and Interlibrary Loans (ILLs)



Polaris ILLS

Polaris manages your library collection *and* the collections of all the other TRAC libraries together in one large database.

Your patrons and patrons throughout TRAC place holds, or requests, on all these holdings.

Everyday library material is on the move to satisfy TRAC patrons, and other patrons in Alberta!

Sending and receiving Interlibrary Loans (ILLS) is an important part of your daily work: Patrons are not only at your desk, but also on your computer “desktop”!

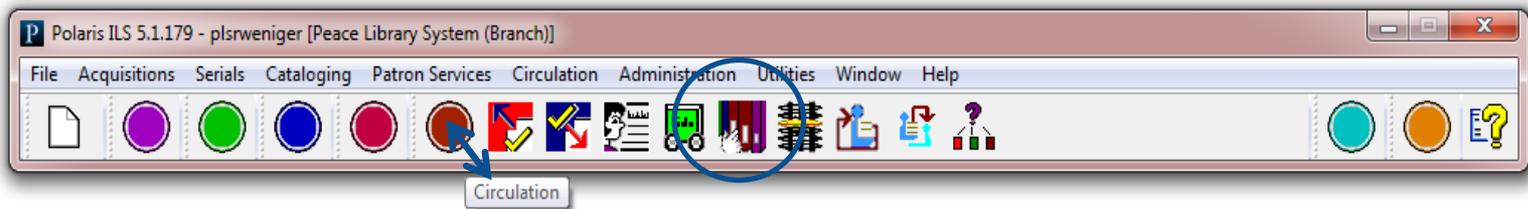
Polaris ILLS & the Request Manager

Hold requests are managed through a Polaris report called the Request Manager.

This should be opened daily, the items gathered from your collection, “Checked In”, and put on your local holds shelf, or sent to the requesting library.

Please watch the training PowerPoint called “Shipping ILLs” on the PLS website.

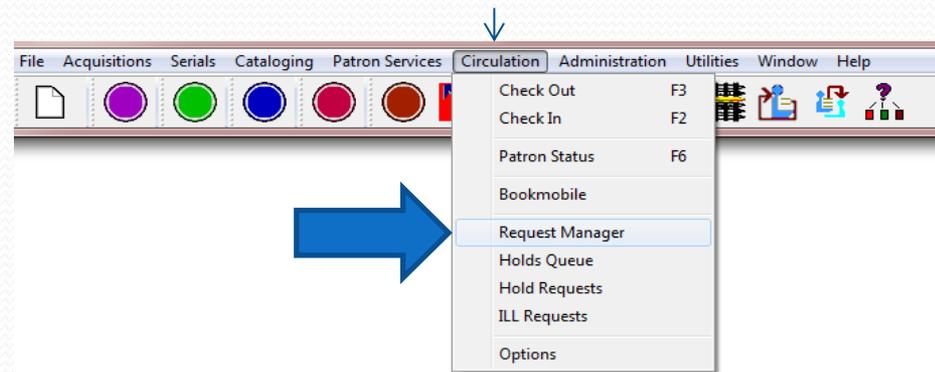
Polaris ILLS & the Request Manager



On the Polaris toolbar click on the burgundy button to open the circulation view. The Request Manager icon is a hand selecting a book from a shelf:



Or choose
“Request Manager”
from the Circulation
drop down list.



Polaris Request Manager - Hold Requests

Request Manager - Hold Requests

File View Tools Help

Branch name: Worsley and District Library Society (AWD) By: Item Status: Pending

Requests

| Collection | Shelf L... | Call Number | Author | Title | Format | Patron Name | Pickup B... | Barcode | Pending Date |
|------------|-------------|---------------|----------------|---------------------|--------|-----------------|-------------|----------------|--------------|
| E | Children... | E BER c. 1 | Berenstain,... | The Berenstain ... | Book | Dubreuil, Be... | ASLM | 32407000042654 | 09/11/2016 |
| E | Children... | EF Y KEA c. 1 | Keats, Ezra... | Goggles! | Book | Johnson, Lisa | AOM | 32407000010370 | 08/11/2016 |
| E | Children... | EL FIC HU... | Hundal, N... | I heard my moth... | Book | Mayer, Beck... | AGP | 31407000009456 | 08/11/2016 |
| E | Children... | EL FIC KE... | Keats, Ezra... | Whistle for Willie | Book | Johnson, Lisa | AOM | 31407000008359 | 08/11/2016 |
| NF | Reference | 796.323 FI... | | F.I.B.A. handbo... | Book | Bylsma, Esther | ASLM | 31407000054403 | 09/11/2016 |
| NF | Reference | 940.542 B... | Brook, Henry. | True stories of ... | Book | Drumheller P... | ADRM | 31407000131128 | 05/11/2016 |
| TR | Teache... | 796 BAK c. 1 | Baker, Doug. | The coaches book. | Book | Bylsma, Esther | ASLM | 31407000044735 | 09/11/2016 |
| TR | Teache... | TR 394.2 ... | Gagné, De... | Slapshot Santa s... | Book | Ratzlaff, Diana | AIRC | 31407000128322 | 08/11/2016 |

Held items to transfer:

| Collection | Shelf L... | Call Number | Author | Title | Format | Patron Name | New Pick... | Barcode | Held Date |
|------------|------------|-------------|--------|-------|--------|-------------|-------------|---------|-----------|
|------------|------------|-------------|--------|-------|--------|-------------|-------------|---------|-----------|

For Help, press F1

Number: 8 Bindings: Nov 10 2016 4:25AM RTF: Nov 10 2016 5:22AM NUM

The request manager opens by default to your branch . Focus on the top window (Requests), noting that the total number of items is not visible in the window (evidenced by the scroll bar on the right). The total number of requests (8) shows in the center , at the bottom of the workform.

Polaris Request Manager - Hold Requests

Request Manager

Branch name: Worsley and District Library Society (AWD) By: Item Status: Pending

Requests

| Collection | Shelf L... | Call Number | Author | Title | Format | Patron Name | Pickup B... | Barcode | Pending Date |
|------------|-------------|---------------|----------------|---------------------|--------|-----------------|-------------|----------------|--------------|
| E | Children... | E BER c. 1 | Berenstain,... | The Berenstain ... | Book | Dubreuil, Be... | ASLM | 32407000042654 | 09/11/2016 |
| E | Children... | EF Y KEA c. 1 | Keats, Ezra... | Goggles! | Book | Johnson, Lisa | AOM | 32407000010370 | 08/11/2016 |
| E | Children... | EL FIC HU... | Hundal, N... | I heard my moth... | Book | Mayer, Beck... | AGP | 31407000009456 | 08/11/2016 |
| E | Children... | EL FIC KE... | Keats, Ezra... | Whistle for Willie | Book | Johnson, Lisa | AOM | 31407000008359 | 08/11/2016 |
| NF | Reference | 796.323 FI... | | F.I.B.A. handbo... | Book | Bylsma, Esther | ASLM | 31407000054403 | 09/11/2016 |
| NF | Reference | 940.542 B... | Brook, Henry. | True stories of ... | Book | Drumheller P... | ADRM | 31407000131128 | 05/11/2016 |
| TR | Teache... | 796 BAK c. 1 | Baker, Doug. | The coaches book. | Book | Bylsma, Esther | ASLM | 31407000044735 | 09/11/2016 |
| TR | Teache... | TR 394.2 ... | Gagné, De... | Slapshot Santa s... | Book | Ratzlaff, Diana | AIRC | 31407000128322 | 08/11/2016 |

The request manager opens by default already sorted by collection code.

(The first column in the report)

The list can be sorted by any of the column headings by clicking on the column headings. If the collection code reflects how materials are organized and shelved in your library it is not necessary to re-sort the report.

Polaris Request Manager - Hold Requests

Request Manager

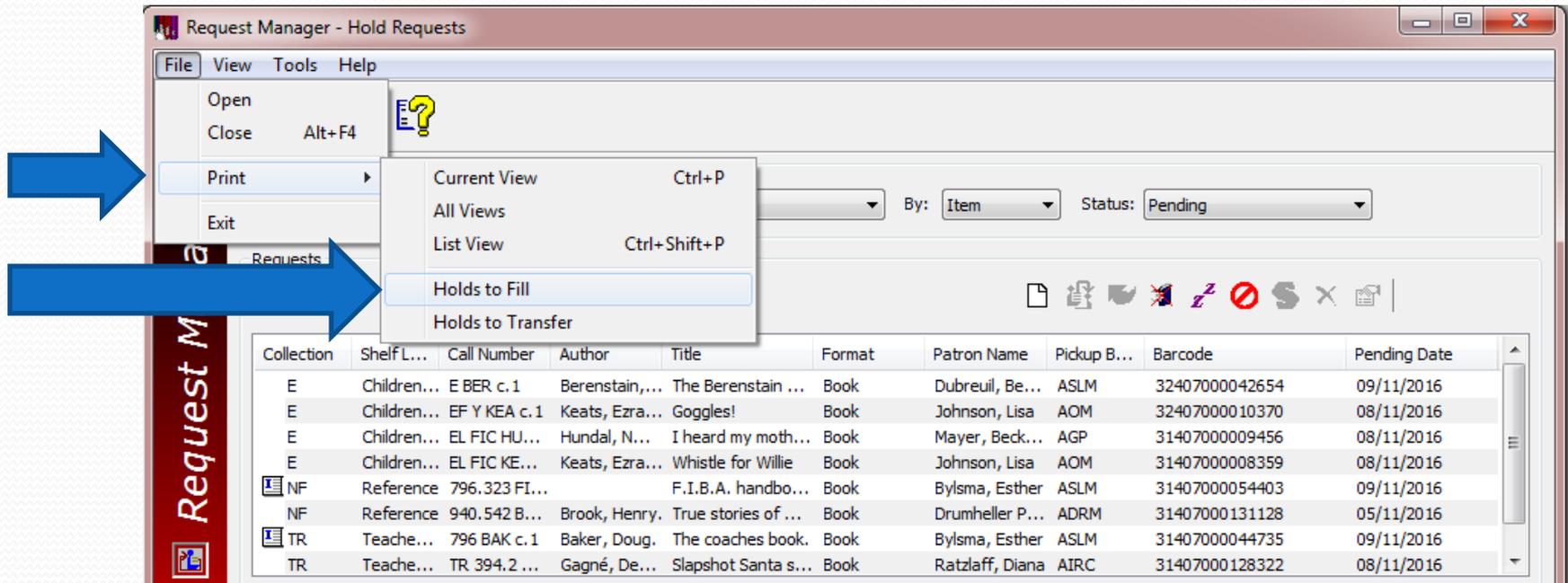
Branch name: Worsley and District Library Society (AWD) By: Item Status: Pending

Requests

| Selection | Shelf L... | Call Number | Author | Title | Format | Patron Name | Pickup B... | Barcode | Pending Date |
|-----------|-------------|---------------|----------------|---------------------|--------|-----------------|-------------|----------------|--------------|
| E | Children... | E BER c. 1 | Berenstain,... | The Berenstain ... | Book | Dubreuil, Be... | ASLM | 3240700042654 | 09/11/2016 |
| E | Children... | EF Y KEA c. 1 | Keats, Ezra... | Goggles! | Book | Johnson, Lisa | AOM | 3240700010370 | 08/11/2016 |
| E | Children... | EL FIC HU... | Hundal, N... | I heard my moth... | Book | Mayer, Beck... | AGP | 3140700009456 | 08/11/2016 |
| E | Children... | EL FIC KE... | Keats, Ezra... | Whistle for Willie | Book | Johnson, Lisa | AOM | 31407000008359 | 08/11/2016 |
| NF | Reference | 796.323 FI... | | F.I.B.A. handbo... | Book | Bylsma, Esther | ASLM | 31407000054403 | 09/11/2016 |
| NF | Reference | 940.542 B... | Brook, Henry. | True stories of ... | Book | Drumheller P... | ADRM | 31407000131128 | 05/11/2016 |
| TR | Teache... | 796 BAK c. 1 | Baker, Doug. | The coaches book. | Book | Bylsma, Esther | ASLM | 31407000044735 | 09/11/2016 |
| TR | Teache... | TR 394.2 ... | Gagné, De... | Slapshot Santa s... | Book | Ratzlaff, Diana | AIRC | 31407000128322 | 08/11/2016 |

Note the “Item Record” icons to the left of the 5th and 7th items. This indicates that only these barcodes can satisfy this request. Even if you have multiple copies of “The coaches book”, for example, only the item with the listed barcode will do. Item specific hold requests like these may result because your library has the only holding in all of TRAC or because the hold has been placed directly on the item.

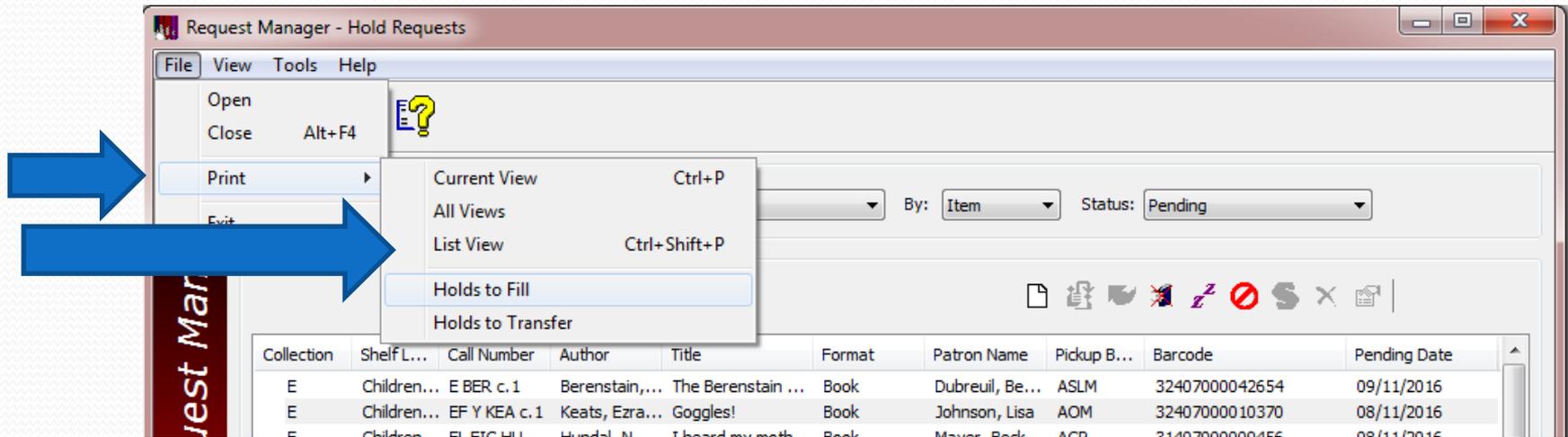
Polaris Request Manager - Hold Requests



On the File -> Print drop down menu, select “Holds to Fill” to print this 8 item list as a 2 page report. The first item will appear as formatted below:

| | | | |
|--|-----------------------------|------------------------|-----------------------------------|
| E E BER c.1 | Book | Children's Area | 32407000042654 |
| The Berenstain Bears and the Nutcracker | | | Berenstain, Jan, 1923-2012 |
| Dubreuil, Benjamin | Family | ASLM | 20135000253020 |
| 780-805-1895 | Pickup Library: ASLM | | |

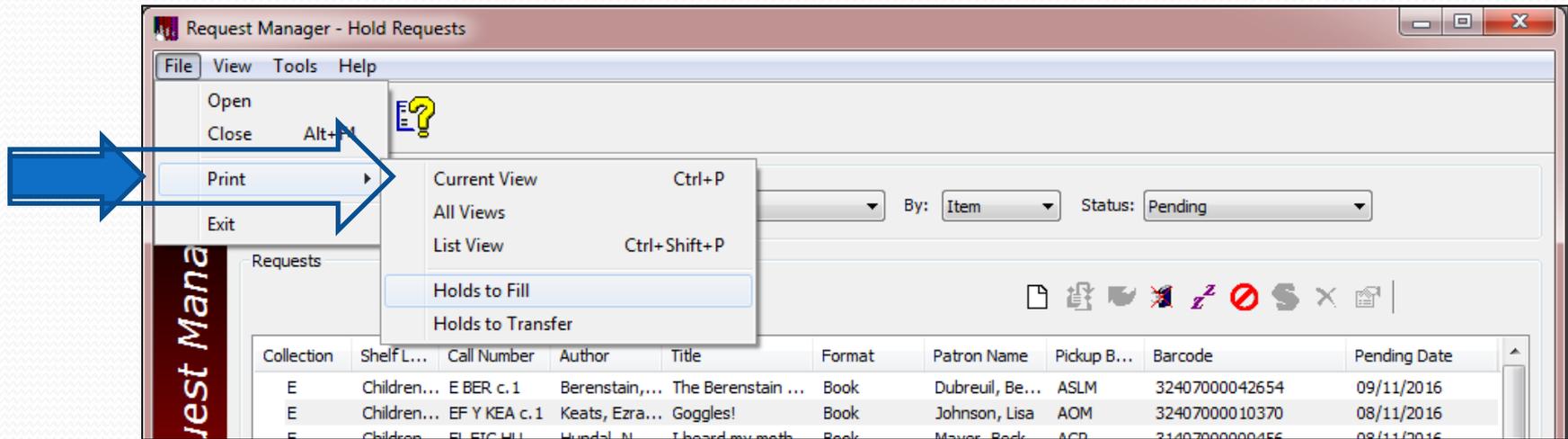
Polaris Request Manager - Hold Requests



On the File -> Print drop down, select “List view” to print this 8 item list as a 1 page report formatted as below.

| Collection | Shelf Location | Call Number | Author | Title | Format | Patron Name | Pickup Branch | Barcode | Pending Date |
|------------|------------------|--------------------|----------------------------|---|--------|---|---------------|----------------|--------------|
| E | Children's Area | E BER c.1 | Berenstain, Jan, 1923-2012 | The Berenstain Bears and the Nutcracker | Book | Dubreuil, Benjamin | ASLM | 32407000042654 | 09/11/2016 |
| E | Children's Area | EF Y KEA c.1 | Keats, Ezra Jack | Goggles! | Book | Johnson, Lisa | AOM | 32407000010370 | 08/11/2016 |
| E | Children's Area | EL FJC HUN WCS c.1 | Hundal, Nancy, 1957- | I heard my mother call my name | Book | Mayer, Becky Lynn | AGP | 31407000009456 | 08/11/2016 |
| E | Children's Area | EL FJC KEA WCS c.1 | Keats, Ezra Jack | Whistle for Willie | Book | Johnson, Lisa | AOM | 31407000008359 | 08/11/2016 |
| INF | Reference | 796.323 FIB c.1 | | F.I.B.A. handbook : rules, cases, mechanics | Book | Bylsma, Esther | ASLM | 31407000054403 | 09/11/2016 |
| NF | Reference | 940.542 BRO c.1 | Brook, Henry. | True stories of D-Day | Book | Drumheller PLibrary Display, Drumheller | ADRM | 31407000131128 | 05/11/2016 |
| TR | Teacher Resource | 796 BAK c.1 | Baker, Doug. | The coaches book. | Book | Bylsma, Esther | ASLM | 31407000044735 | 09/11/2016 |
| TR | Teacher Resource | TR 394.2 GAG c.1 | Gagné, Denise, 1956- | Slapshot Santa scores again : a musical play for Elementary schools | Book | Ratzlaff, Diana | AIRC | 31407000128322 | 08/11/2016 |

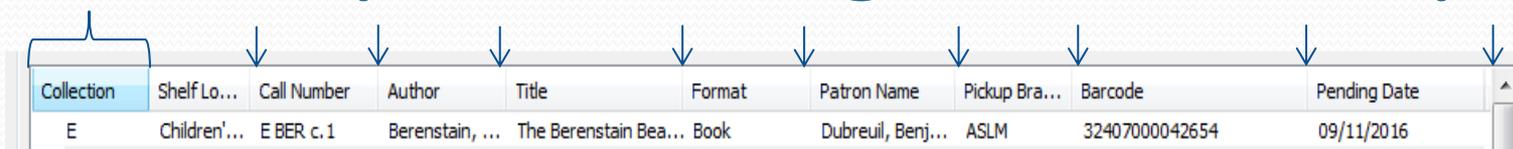
Polaris Request Manager - Hold Requests



Best practice is to quickly stretch narrow columns and hide unnecessary columns, then print a one page “Current View”.

| Collection | Shelf Location | Call Number | Author | Title | Barcode |
|------------|------------------|--------------------|----------------------------|---|----------------|
| E | Children's Area | E BER c.1 | Berenstain, Jan, 1923-2012 | The Berenstain Bears and the Nutcracker | 32407000042654 |
| E | Children's Area | EF Y KEA c.1 | Keats, Ezra Jack | Goggles! | 32407000010370 |
| E | Children's Area | EL FIC HUN WCS c.1 | Hundal, Nancy, 1957- | I heard my mother call my name | 31407000009456 |
| E | Children's Area | EL FIC KEA WCS c.1 | Keats, Ezra Jack | Whistle for Willie | 31407000008359 |
| NF | Reference | 796.323 FIB c.1 | | F.I.B.A. handbook : rules, cases, mechanics | 31407000054403 |
| NF | Reference | 940.542 BRO c.1 | Brook, Henry. | True stories of D-Day | 31407000131128 |
| TR | Teacher Resource | 796 BAK c.1 | Baker, Doug. | The coaches book. | 31407000044735 |
| TR | Teacher Resource | TR 394.2 GAG c.1 | Gagné, Denise, 1956- | Slapshot Santa scores again : a musical play for Elementary schools | 31407000128322 |

Polaris Request Manager - Hold Requests



| Collection | Shelf Lo... | Call Number | Author | Title | Format | Patron Name | Pickup Bra... | Barcode | Pending Date |
|------------|-------------|-------------|-----------------|-----------------------|--------|-------------------|---------------|----------------|--------------|
| E | Children... | EBER c.1 | Berenstain, ... | The Berenstain Bea... | Book | Dubreuil, Benj... | ASLM | 32407000042654 | 09/11/2016 |

Hover over any column heading to see the column edges. Hovering over the right edge and double clicking will adjust the width to the maximum width required to view the column's longest item. Hover over a columns' right edge and drag the cross hairs left or right to erase or expand the column width.

Hover over the column right edge until a cross bar is visible:



Double click on the right edge to auto adjust width.

Drag the crossbar to change any column width.

Hide 'Pending Date', 'Pickup Branch', 'Patron Name', and 'Format' columns. Stretch the others for an easy to read, concise report for retrieving items from your stacks.

Close the Request Manager and re-open at any time to restore defaults.

Polaris Request Manager - Hold Requests

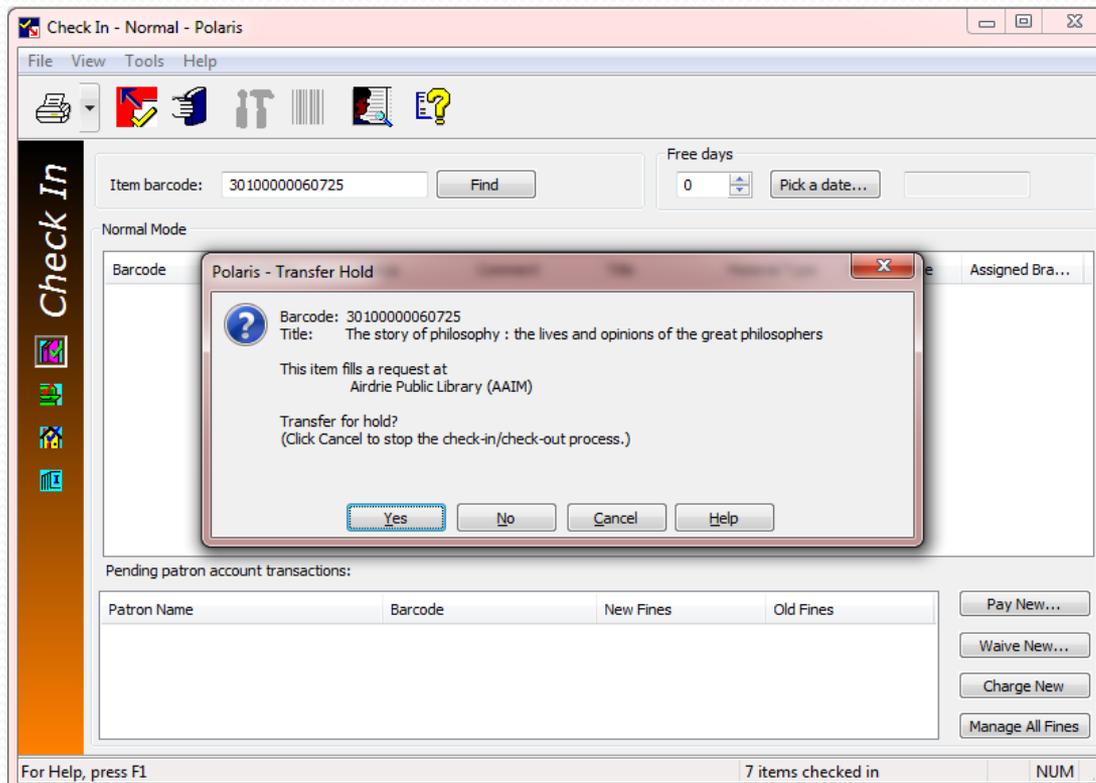
| Request Manager - Hold Requests | | | | | |
|--|------------------|--|----------------------------|---|----------------|
| Branch name: <input type="text" value="Worsley and District Library Society (AWD)"/> | | | | | |
| By: <input type="text" value="Item"/> | | Status: <input type="text" value="Pending"/> | | | |
| Requests | | | | | |
| <input type="text"/> | | | | | |
| Collection | Shelf Location | Call Number | Author | Title | Barcode |
| E | Children's Area | E BER c.1 | Berenstain, Jan, 1923-2012 | The Berenstain Bears and the Nutcracker | 32407000042654 |
| E | Children's Area | EF Y KEA c.1 | Keats, Ezra Jack | Goggles! | 32407000010370 |
| E | Children's Area | EL FIC HUN WCS c.1 | Hundal, Nancy, 1957- | I heard my mother call my name | 31407000009456 |
| E | Children's Area | EL FIC KEA WCS c.1 | Keats, Ezra Jack | Whistle for Willie | 31407000008359 |
| <input checked="" type="checkbox"/> NF | Reference | 796.323 FIB c.1 | | F.I.B.A. handbook : rules, cases, mechanics | 31407000054403 |
| NF | Reference | 940.542 BRO c.1 | Brook, Henry. | True stories of D-Day | 31407000131128 |
| <input checked="" type="checkbox"/> TR | Teacher Resource | 796 BAK c.1 | Baker, Doug. | The coaches book. | 31407000044735 |
| TR | Teacher Resource | TR 394.2 GAG c.1 | Gagné, Denise, 1956- | Slapshot Santa scores again : a musical play for Elementary schools | 31407000128322 |

Best practice is to stretch narrow columns and hide unnecessary columns, then print a one page, “Current View” report.

Polaris Request Manager - Hold Requests

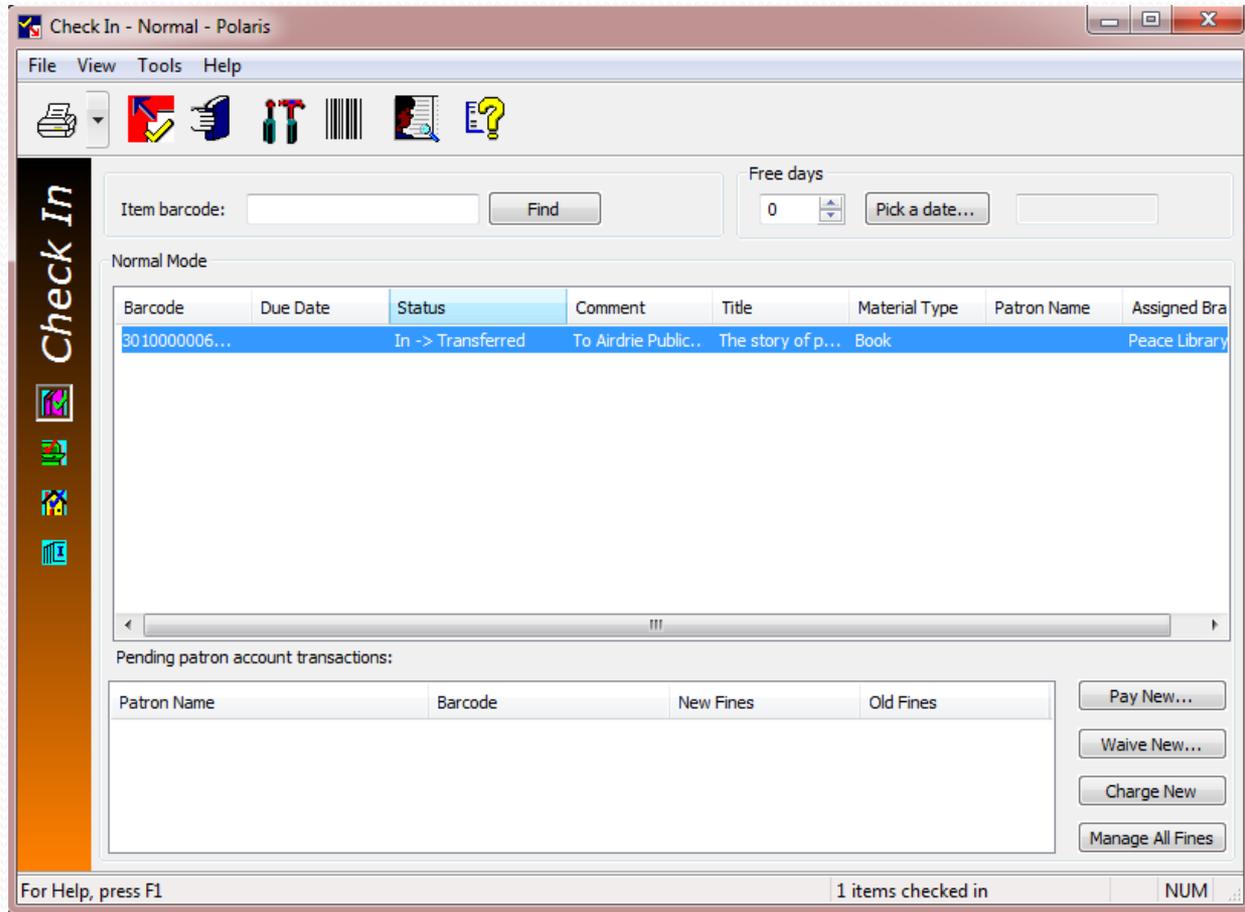
Use the “Check in” workflow and scan each barcode. A pop up window will ask you if you wish to transfer the item to fill the request. Press enter, or click on “Yes”, and send the item to the destination indicated.

If you have a receipt printer, an In-Transit receipt will print for you.



Polaris Request Manager - Hold Requests

In this example, see how the Circulation Status changed from “In” to “Transferred”. When Airdrie Library receives and checks in the item the status will change to “Being Held”. When their requesting patron picks up the hold, the status will change to “Out”. When the patron returns the item, the status will change to “In Transit”. When you receive and check in the item, the status will change to “Shelving Cart” (In).



Polaris Request Manager - Hold Requests

Please use the “Shipping ILLs” training PowerPoint to learn more about packaging, addressing and shipping library material.

For any Hold Request questions you have,
please call Peace Library System
1-800-422-6875 toll free or
780-538-4656