



Beginners Guide to System Administration for Polaris

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Resources for this presentation

Slide deck, outlines, documents, links, and further information are available at:

cyberpunklibrarian.com/iug2023

🎉 Congratulations on your (possibly surprising) promotion! 🎉

- Overview of Polaris SA Workform
- Breaking down the structure of SA
 - Locational Levels
 - Operational Levels
 - Permissions
 - Collections
 - Database
- Documentation and the importance thereof
- Where to go for help



Administration Explorer - System - Occochee Library System - Home

File Edit Help

Administration Explorer - System

System: OLS

System Information

Name: Occochee Library System id: OLS

Display Name: Occochee Library System

Primary Address: 211 East Dwyer Avenue #200PHB2, OCCOCHEE, FL, USA 34774

Phone: 407.742.2626 Email: info@occlib.org

All Phone: Fax:

WWW: www.occlib.org

Default Country: USA

Default Currency: US Dollar

Default Language: English - United States

Contact Person: Caryn Gelfer Email: [REDACTED]

Phone: [REDACTED] Fax:

Alternate Contact: Email:

Phone: Fax:

Error Reporting Email:

for Help, press F1

71 driver NLM

Administrative Explorer - System - Oracle Library System - Admin

File Edit Help

Administrative Explorer - System

Administrative Explorer - System

System - All

System Information

Name: Oracle Library System idn: OCL

Display Name: Oracle Library System

Organization: OCLC (123456789) OCLC (A) (P) (USA) (979)

Phone: +1 607 742 8888 Email: feedback@oclc.org

Alt Phone: Fax:

WWW: www.oclc.org

Default Country: USA

Default Currency: USDollar

Default Language: English - United States

Contact Person: Carol Griffin Email: [REDACTED]

Phone: [REDACTED] Fax:

Alternate Contact: Email:

Phone: Fax:

Site Reporting Email:

Locational

Locational

for help, press F1

Oracle

12.1.2

The screenshot displays the Windows Administrative Tools console for the 'System' category. The left-hand navigation pane is divided into three color-coded sections: blue for 'Locational', orange for 'Operational', and another blue section for 'Locational'. The 'Operational' section includes 'Device Manager', 'Power Options', 'System', 'Policy, Troubleshooting, and Diagnostic Tools', and 'Device Manager'. The 'Locational' sections include 'System' (with sub-items like Performance, Problem, Performance, Security, Policy, Troubleshooting, and Diagnostic Tools) and various 'Library' categories such as 'Dewey Library', 'Dewey Library - Book', 'Dewey Library - CD-ROM', 'Dewey Library - DVD', 'Dewey Library - E-Book', 'Dewey Library - E-Book - On-Demand', and 'Dewey Library - E-Book - On-Demand'. The main pane shows 'System Information' for 'Dewey Library System' (ID: 02020116). Fields include Name, Display Name, Manufacturer, Model, Version, Service Pack, Architecture, System Type, Default Language, Contact Person, Alternate Contact, and Server Reporting Email. The 'Contact Person' and 'Alternate Contact' fields have redacted names and phone numbers.

System Information:

Name	Dewey Library System	ID#	02020116
Display Name	Dewey Library System		
Manufacturer	Manufacturer: 02020116 (USA, 3/17)		
Model	400-742-8888	Email	redacted@deweylibrary.org
Version		Alt Phone	
Service Pack		Phone	
Architecture		Alt Email	
System Type	Origin: United States	Email	
Contact Person	Carla Griffin	Phone	██████████
Alternate Contact		Phone	
Server Reporting Email		Phone	

Locational

Operational

Locational

Operational

Locational Levels



System

- Parameters
 - Profiles
 - Policy Tables
 - Database Tables
-

Library

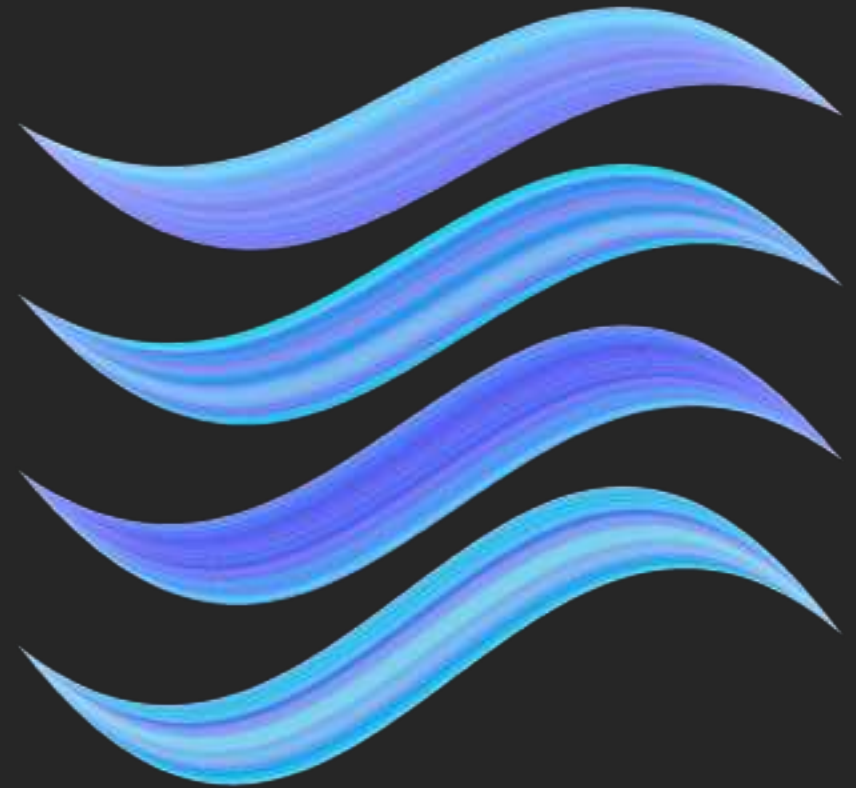
- Parameters
 - Profiles
 - Policy Tables
 - Database Tables
-

Branch

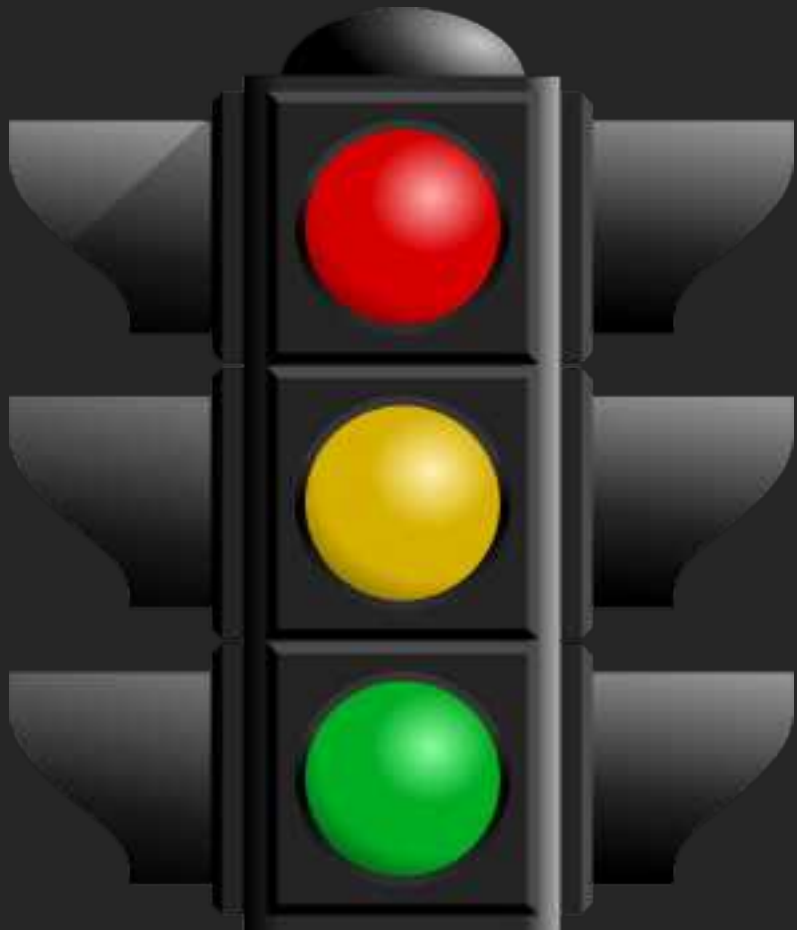
- Parameters
- Profiles
- Policy Tables
- Database Tables

Operational Levels

- **Server**
 - Overarching infrastructure
 - Can be one or multiple servers
 - Smaller Library – Single server set up
 - Consortium – Multiple servers
- **Workstations**
 - Must be registered in the system
 - Assigned permissions
 - Administrator permissions
- **Staff Member**
 - Unique accounts that operate within the system
 - Assigned Various permissions
- **Patrons**
 - The lowest, yet most important level of library operations



Permissions – Basic operations



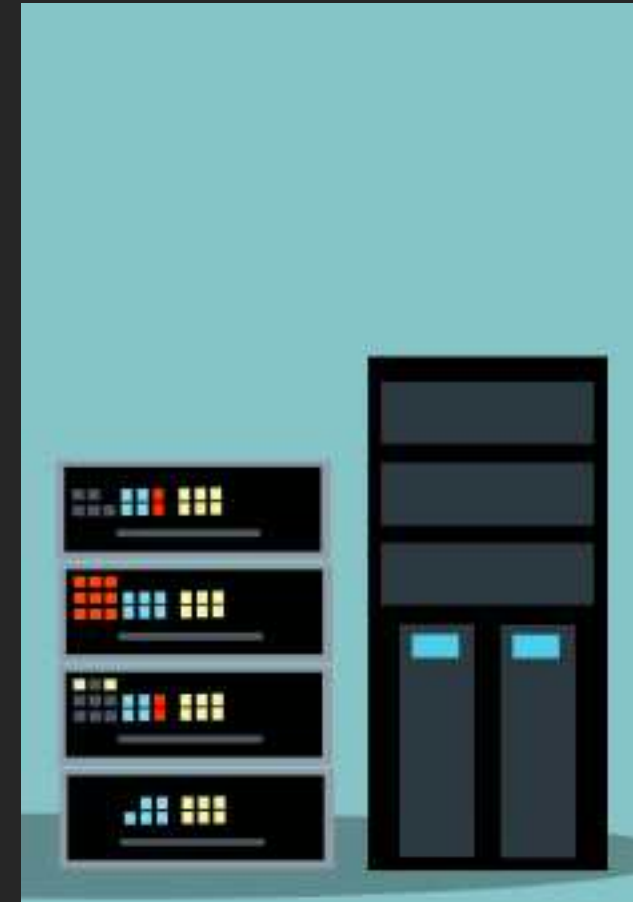
- **Access** – Are you allowed into a subsystem?
- **Allow** – Can you view something?
- **Create** – Can you make something new?
- **Delete** – Can you remove something?
- **Modify** – Can you change something?

SUPER BONUS FUN FACTS!

- A single library system will have over 860 separate permissions
- Consortia can have tens of thousands

Permissions – Subsystem Percentages

Acquisitions	~10%
Cataloguing	~35%
Circulation	~26%
Find Tool	~0.3%
Leap	~0.3%
Public Access Catalog	0%
Polaris Fusion	~1%
Serials	~8%
System Administration	~18%



Permissions Groups



- Never assign permissions individually
- No seriously, never freakin' do that – it's *bad*

👤 Permissions Groups 👤

- Many ways to build these out
 - Levels
 - Stacking levels
 - By job title
- Create new staff members by copying others

Collections



Upper-Level Hierarchy

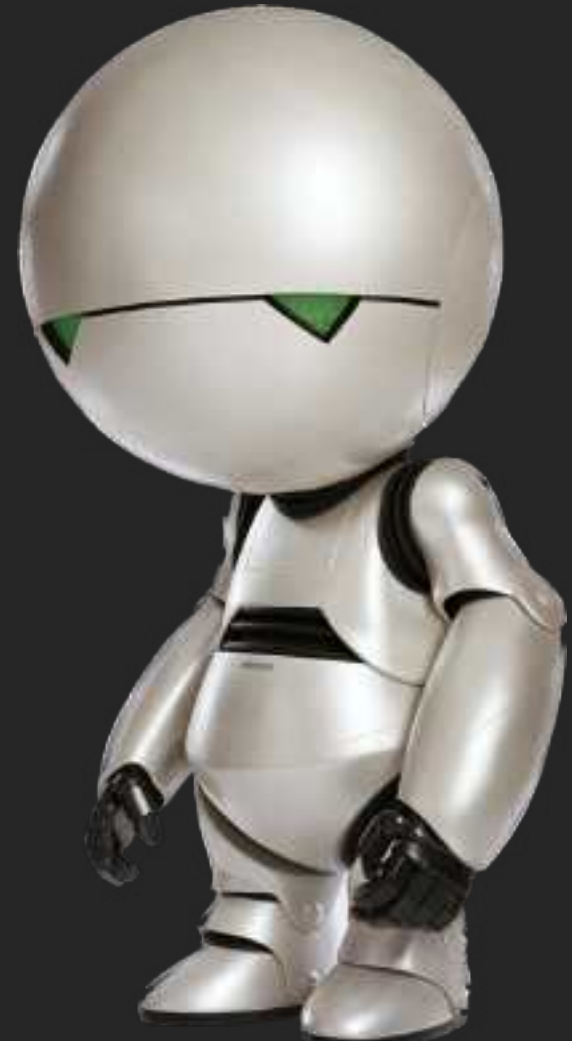
- Collection Codes
- Material Types
 - The most important
- Shelf Locations

Lower-Level Hierarchy

- Authority Records (aka Auths)
- Bibliographic Records (aka Bibs)
- Item Records (aka Items)
- Serials (Kind of a special case)

The Database

- Everything is Microsoft
 - Windows Server
 - Internet Information Services (IIS)
 - C#
 - .NET & ASP
- All of it runs on **Microsoft SQL Server**
 - At least three databases
 - Polaris – What's happening now?
 - PolarisTransactions – What happened?
 - Results – Tracking
 - 4,288 stored procedures operating on 1,525 tables
 - Maybe learn some T-SQL
 - At the very least, learn the structure



Documentation – Polaris & Yours

- Polaris documentation is, quite frankly, amazing
 - Online documentation (Leap & Staff Client)
 - Downloadable PDFs
- But your own documentation is just as important!
 - Write down what you discover
 - Your own tips, tricks, tactics and tracking
 - Document changes
 - Especially document *how* you made the change



Connect



- You are not alone!
- Join us on Discord!
- Join us on the IUG Forums!



THANK YOU

Questions?

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