

Presentation Outline

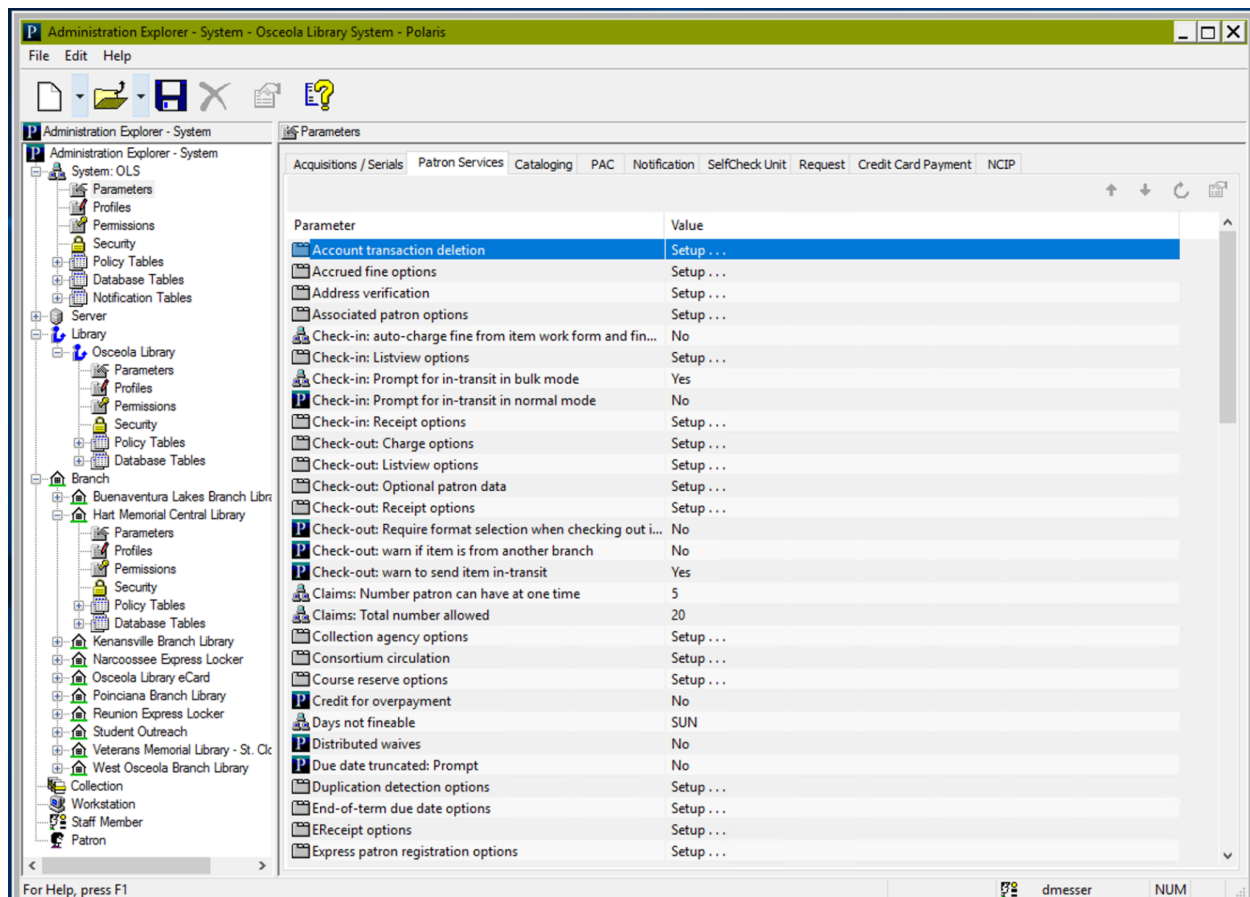
Beginners Guide to System Administration for Polaris

Note: This is just a guide and a long-winded outline. While there's a lot of text and information here, much of it will be quick, with brief explanations. More than anything, this combines my outlines and notes into one structural document. Speak freely during the talk and let the document guide you rather than impose its will upon you.

Welcome to Polaris ILS System Administration

Overview of the Polaris SA Workform

Congratulations on your (possibly surprising) promotion! You're the new ILS Administrator and, before the last one left, they elevated your permissions and now you can access SA. So you log into Polaris, bring up **Administration -> Explorer -> System** and you're greeted with this:



Great! What the *hell* is that and what do I do with it?

Talking points:

- A. The SA Workform - Quick overview
 - 1. Dig down far enough (MARC Validation - Bibliographic) and you find old Polaris UI
- B. SA is the control center for all of the Polaris system
- C. Interconnectedness
 - 1. Organizations, Patron Codes, and Material Types all connect at the Patron/Material Type Loan Limits
 - 2. Fines involve Fine Codes, Patron Codes, and Organizations
 - 3. Which is why changes can be difficult - because of cascading effects

Tip: When you're looking for a particular setting (and especially looking for its *effects*), start at the branch level and work up.

Locational Levels

Under each locational level are multiple options that expand into even further options. Don't worry, Polaris is a complex system and there's a lot going on back here to make it work. You won't need to touch everything, in many cases there are plenty of things you'll *never* touch.

At one point, maybe back in the early 2000s, Parameters and Profiles meant something. That knowledge has been lost to time. Sometimes, you just need to go looking for that setting, especially if it's something you've not touched in a while.

Talking points:

- A. The Levels
 - 1. System
 - 2. Library
 - 3. Branch
- B. Level operations (commonly used)
 - 1. Parameters
 - a) Supposedly a more global, overarching batch of settings that control the higher level functions of a System, Library, or Branch. You'll find your check out, check in, and renewal options here along with your self-check set-up, credit card set-up, and notifications settings.
 - 2. Profiles
 - a) A more locally focused batch of settings, at least in theory. See the above comment about the true knowledge being lost in the whispers of the ethereal flow. You'll find a lot of your PowerPAC settings in here, under two separate tabs for some reason, but there you go. There are also settings for Mobile PAC and Children's PAC and if you're using either one of those... stop it. You'll also find patron registration defaults which, yes, you can set for each individual branch.
 - 3. Policy Tables
 - a) If it has the word table in it, then you are basically looking at a SQL results list that you can manipulate in the SA screen. In some cases, it can take hours to make changes. The Policy Tables are just that, they control the aspects of Polaris that dictate the rules of your library system. Dates Closed, Fines and Fine Codes (yes those are two different things), Loan Periods and the dreaded Patron/Material Type Loan Limits table.
 - 4. Database Tables
 - a) The low level goodies from Postal Codes to Gender definition (why?) and Mobile Phone Carriers. At the system level, you'll find the Object Locks table to force close all those records that staff left open in Leap because they were "working on them" for, ya know, four days, and they absolutely needed these to be open for over 96 hours.

Tip: Librarians are ruining the business of running a smooth and efficient ILS.

Tip: Don't feel bad if you can't remember where something is. *No one* remembers where everything is, not even your Site Manager.

Tip: Never feel bad about sending in tickets to your Site Manager. Your library is paying for that support. *Use it.*

Tip: Lock down the ability to change Postal Codes. Lock. It. Down. The only people who should be able to change Postal Codes are the admins.

Operational Levels

Talking points:

- A. Server
 - 1. Overarching infrastructure
 - 2. Can be one or multiple servers handling specific things
 - a) Single server set up for smaller libraries
 - b) Larger library might have production, telephony, web, report, and training servers
 - B. Workstation
 - 1. Must be registered
 - 2. Assigned permissions
 - C. Staff Member
 - 1. Unique accounts with various permissions
 - D. Patrons
 - 1. The lowest operational level, but the most important
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Permissions & Permissions Groups

Literally these define who can do what and where. You can assign permissions to Staff Members and Workstations.

Permissions Groups are your friend. Even if you have a staff member named Dana Holtzmann with a user name of dholtzmann and dholtzmann needs to do things that no other staff member needs to do, go ahead and make a Permission Group called “dholtzmann’s Polaris permissions.” Assigning permissions individually leads to madness later on.

With one exception: Access Logon Branch and Logon Branches. Yeah, those are okay to throw out individually because coverage and movement and so on. But this only works if you’ve designed your Permissions Groups properly.

Be smart with your permissions and their assignments. There are many ways to create groups. Some libraries use Levels where a Page gets a Level 1 group with a limited set of permissions. LAs get Level 2, which is layered on top of Level 1 and adds new permissions. Etc.

Others do it by job. LAs get the LA permissions group. Cataloguers get the Cataloguers permissions group.

No joking, it can take hours and days to fully set up a working set of permissions groups. It’s 100% time well spent. Once they’re set, you rarely need to touch them again. Staff can come and go like a karma chameleon and permissions are easy to assign, reassign, and revoke. Better to have 20 different permissions groups that took you 20 days to set up than to have 20 different people with individual permissions.

Talking Points:

- A. Basic operations
 - 1. Access - Are you allowed into something?
 - 2. Allow - Can you view something?
 - 3. Create - Can you make a new something?
 - 4. Delete - Can you remove something?
 - 5. Modify - Can you change something?
- B. Counts
 - 1. Single location library system will have over 860 permissions
 - 2. Consortia can have far more - Inland system has almost 22,300

- C. Subsystem Permissions by Percentage
 - 1. Acquisitions: ~10%
 - 2. Cataloging: ~35%
 - 3. Circulation: ~26%
 - 4. Find Tool: ~0.3%
 - 5. Leap: ~0.3%
 - a) Because Leap permissions are just access to Leap. All other permissions come from the other subsystems.
 - 6. Public Access Catalog: 0%
 - a) It's in there as a category, but there are no permissions beneath it
 - 7. Polaris Fusion: ~1%
 - 8. Serials: ~8%
 - 9. System Administration: ~18%
- D. Use Permissions Groups

Tip: Grant every single workstation with Administrator permissions. If you think there's a reason not to do that, re-examine your reasons because you're wrong. In Polaris your Staff Members should be limited, not your workstations.

Collections

Collection Codes are the overarching description of where these items belong. Adult Fiction, Children's Non-Fiction, Teen Media, Board Books, etc. This should be treated as the highest level and it's not unusual to have many different kinds of items under a Collection Code. Take Teen Media for instance. That could cover DVDs, Blu-Rays, Audiobooks, Music CDs, Video Games, Software, and more. That's all media and it all fits. Teen Books might include Teen Fiction, Teen Nonfiction, Teen Reference, Teen Graphic Novel, and so forth. Speaking of which...

Material Types should be a base description of what you are holding in your hand. Is this a DVD? Then that's the Material Type. If you're adding it to a collection you may want to call it a Children's DVD because it's in the Children's Media collection or whatever. Even then, naming it "Children's DVD" is a finding aid for your *patrons*. It's a DVD, call it that. Many libraries will "genrefy" their material types out of necessity because Shelf Location (more in a second) isn't all that great for the patrons. So it's not unusual to find "Children's Fantasy DVD" or "Adult Mystery."

Shelf Locations... well, if you must. They always seem to be more of an aid for the staff than the patrons and, while you can get them to show up in the PAC, they're not always helpful. So plan accordingly and remember that the word "location" is there for a reason. Adult Blu-Ray is a material type. Adult Media Shelf - First Floor is a Shelf Location. If you can use them to direct patrons to a particular part of the library, then you're doing pretty well with these things.

Talking points:

Collections

- A. Upper level hierarchy
 - 1. Collection Codes
 - 2. Material Types
 - a) The most important one as it keys into loan periods, circ limitations, and fines
 - 3. Shelf Locations
 - B. Lower level hierarchy
 - 1. Authority Records
 - 2. Bibliographic Records
 - 3. Item Records
 - 4. Serials
 - a) Serials are kind of a special case
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The Database

Look, even if you can't write a single line of SQL go get the CHM file that describes the Polaris Databases. It's usually called the Polaris Database Repository on the Supportal and, yeah, it's a CHM file. But it works. The reason it's helpful is that you can bring up a given table, say the `CircItemRecords`. And from there you can see what the linkages are between that table and at least 25 other tables. `CircItemRecords` covers information about a given item, but it also calls on the `ItemStatus` table to let you know if that item is checked in, or out, or if it's missing. It links to the `MaterialTypes` table, the `Collections` table, it's got multiple links to the `Organizations` table so you know which library owns the item, where it's assigned to, the last branch to use it, the last branch to check it in, and more.

Your job will be made much easier by knowing that almost every table in the Polaris database depends on some other table for information. You'll see where that information is coming from, where it goes to, and where it can be modified.

If you have any SQL level access to your database, it's worth your time to learn some T-SQL. T-SQL is the type/flavour of SQL used by Microsoft SQL Server. If you already know another flavour of SQL like SQLite, Postgres, or MariaDB... you're well on your way to using T-SQL and SQL Server. The `SELECT` statement is powerful on its own because you can get data that `SimplyReports` just cannot provide. You can discover problems and troubleshoot more effectively.

And if you have write access to your database, those hour long changes within the `Patron/Material Types Loan Limit` tables (and tables like them) are no longer such a big deal. You can update settings and systems with a single query. Just be careful, okay?

Talking points:

- A. Polaris Staff Client and Leap are friendly front ends for SQL Server
 - B. ~1,525 tables and ~4,288 stored procedures
 - C. Maybe learn some basic T-SQL
 - D. At the very least, learn the basic structure of the database
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Documentation - Polaris and Yours

The Polaris documentation is good and it's readily available. You can get thousands of pages of searchable PDFs, there's the online help, and there's the Database Repository. But you know what's more important than any of that?

Your *own* documentation.

Did you change a setting? Document it. What did you change, when did you change it, where was it, and why? Doesn't need to be a novel.

2023-01-15: Updated hours for Scott Branch to reflect they're open Sundays. Right-click branch name in SA -> Edit. Then Tools menu.

Throw that in a text file. Throw it in Notion. Dump it into Excel. Put it in a notebook. Whatever. So long as it's safe and you can reference it later. You'll be surprised how many problems you can track down by date alone.

Talking points:

- A. Polaris documentation is, quite frankly, amazing
 - B. Make your own documentation
 - 1. Especially when changing something
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Connect

You are not alone. We were all newbies once.

There's a Discord server where you can ask questions and call on all of our knowledge and you'll especially learn from our mistakes. It's free and, even better, it's kinda fun.

Join the IUG Forum Website.

You can often get answers more quickly from the Discord than you can from your Site Manager.