



# ILS FAQs

## Ten Most Commonly Asked Polaris Training Questions

- 1. How do you clear the work form in checkout to check books out to a second patron without having to exit and go back into checkout?**

Put your cursor in the Item Barcode box and hit "Enter". This will clear the screen.
- 2. How long will the Reading History be saved for and how many titles will it save?**

Staff must ask the patron if they want to keep a reading history, do not just automatically turn it on for them. The Reading History will hold 9,999 titles and will be saved for 99 years. Patrons must remember that if they unclick the box, all history will be lost immediately. History will not show up until after day-end processing.
- 3. When do I run my Dynix year-end reports?**

Run all Dynix year-end reports on December 29th, 2008 or on your last "open" day before the 29th. Jane Smith will run those reports you need for your Annual Report (Inter/Intra Library Loan, Collections, Adds & Deletes).
- 4. Do all libraries have to enter items checked-in and checked-out onto Richard's Excel program while Dynix is down and they are open to the public?**

No — you do not have to use the Excel program. You can just keep track manually or in Word. When items are returned you can keep them on a cart and when Polaris is up you must do all your check-outs first, then do your check-ins. This is because a patron may have taken a book out and then brought it back while Dynix was down.
- 5. If a lost book is "Found" when checked-in, will overdue charges be assigned to the borrowing patron's record?**

Right now, no — This is an option that is an individual library's decision. If you want the overdue charges to still be assigned to your patron, contact Richard at headquarters and he will set it up for your library. 1-800-332-1071 [compnet@marigold.ab.ca](mailto:compnet@marigold.ab.ca)
- 6. Will there be a grace day in Polaris?**

Yes — there is one grace day automatically set in Polaris. If you want more than one day, you can increase by entering a number in the "Free Days" box in the Check-In work form.
- 7. Is it possible to show you where you are in the holds queue pertaining to number of holds (Example: 16/47) rather than just telling you what number you are in the queue?**

No — To find out the number of holds on a title you must go into the actual holds queue or you can search the title in TRACpac. Under the Local / TRAC availability information it tells you the number of holds there are on that title. When a patron searches in TRACpac and places a hold they will know how many holds there already are on a title.
- 8. Is there a way for patrons to find out how many copies of an item TRAC has when they place a hold?**

Yes — When a patron places a hold they can right-click on links, click on bibliographical records, then click on TRAC view. This will show the number of copies there are in TRAC.
- 9. Will there be a drop-down menu for Local Library Statistic #1 to choose patron type?**

No — you will have to manually enter patron type (Example: Adult Resident). As each TRAC partner may use this box for a different reason, a drop-down menu is not feasible.
- 10. When a patron changes their personal information in TRACPAC, does it automatically change the information on their patron record?**

No — When a patron changes their information in TRACpac a notice will "pop" telling them that they have to notify their library before the changes come into effect. The library that the patron belongs to then has to go into the patron record and make the changes. This is so not just anyone can make changes to any patron record. An email will be sent to a designated staff person to inform them that a charge has been submitted.

Stay tuned for more questions and answers. Please continue to contact staff at headquarters with your questions—this publication will also be posted on Marigold's website under *ILS News* (as one document entitled ILS FAQs) and will have your questions added to it. [www.marigold.ab.ca](http://www.marigold.ab.ca)