

POLARIS INVENTORY MANAGER

EASY AS 1-2-3

User Manual

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INTRODUCTION:

What YOU Need to Know About PIM (Polaris Inventory Manager)

What will you need?

- All required equipment will be provided to your library by YRL.
- You should receive a laptop equipped with PIM, a USB stick and a wireless barcode scanner.
- You *can* do the inventory visually (by checking boxes rather than scanning) but this is *not* recommended.
- You *will* need a network connection to update the inventory data into Polaris but not while you take the inventory.

What will PIM do?

- PIM will identify items that are misshelved, have a status other than "IN", or satisfy hold requests.
- You can also mark items for weeding.
- You CAN stop or resume your session at any time. You can close and re-open PIM without losing data.
- When you are finished a section, PIM updates to the Polaris database when prompted. (This is when you need the network connection)
- A PDF report is automatically generated along with an optional .txt file (you might want a .txt file if you want to upload the data into excel at a later date).
- You set the parameters for the reports and PIM in general to ensure you are only getting information that matters to YOU.
- PIM can create record sets in Polaris if you choose.
- Additional standard/custom reports can be run in the Polaris staff client after.
- PIM also has a cart feature.

Before You Begin...

- Are your shelves in good order?
- Are items consistently catalogued?
- *You should ensure that collection codes and shelf locations are consistent... for example; J and Juv may have been used interchangeably over the years... you may want to create Polaris record sets and do some bulk changes to make one collection. A good place to start would be to run a report of current collection codes and compare with the sections in your library. YRL can help you with this if needed.*

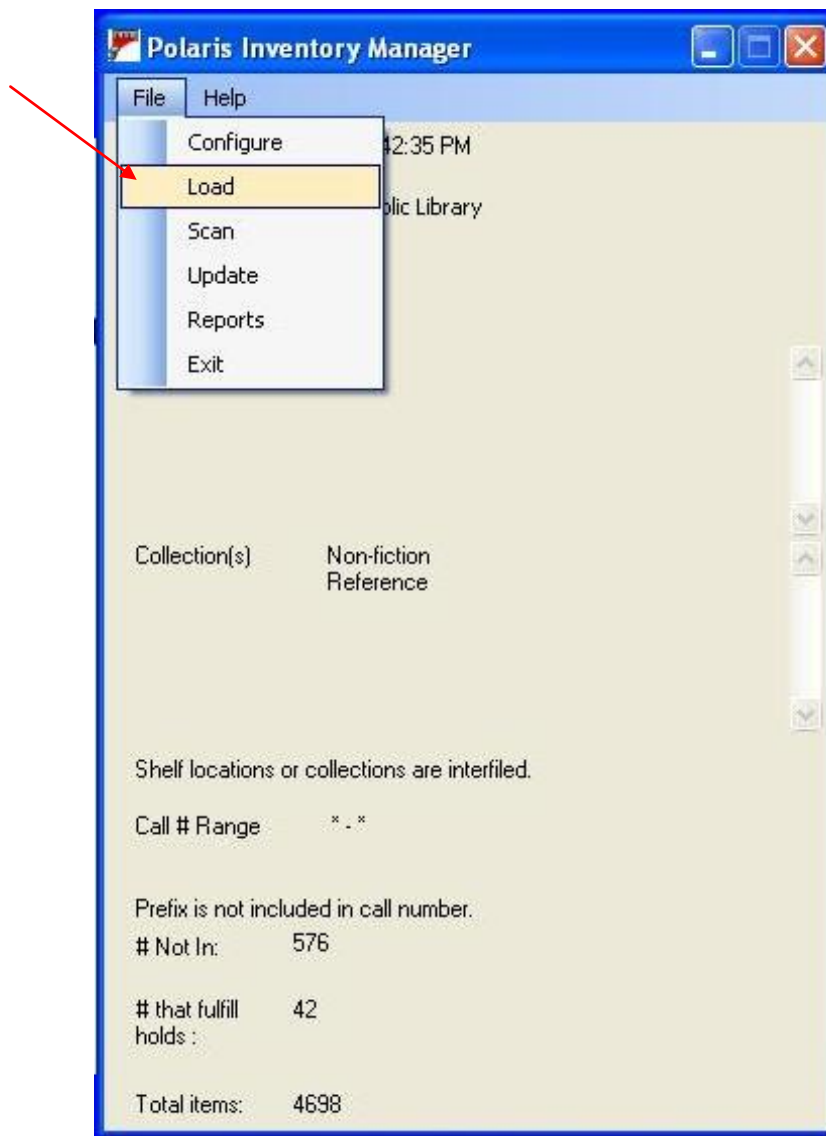
EASY AS 1-2-3

Step 1 LOAD

Double click on the Polaris Inventory Manager (PIM) Icon to open the PIM up.



From the **File Menu**, Choose **LOAD**.



As shown below, you choose your branch at the top... then your available shelf locations and collections will populate.

Load Call # Range

File Help

Branch: Yellowhead Regional Library Record Set:

Shelf Locations

Available Load

No Shelf Location
Aboriginal
Accelerated Reader
Adventure
Agriculture
Assistive Technology
Audio
Audio Books
Audio Visual

☐ Exclude the selected shelf location(s)

Collections

Available Load

Aboriginal
Audio Visual
Audiobook Cassette
Audiobook Compact Disc
Bestseller
Block Adult Fiction
Block Adult Non-Fiction
Block Juvenile Fiction
Block Juvenile Non-Fiction

Non-fiction
Non-fiction - Juvenile

Starting Call #: Ending Call #

☒ Include prefix in call number
☐ Shelf locations or collections are interfiled.

Load

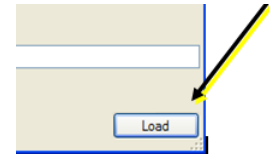
There are 3 ways to LOAD data from Polaris... choose one.

1. By Record Set... You may use this feature for items that may not necessarily follow regular Call # formats... scan them into a record set and inventory them that way. It is also a good way to polish off your inventory if there are random items left over once the collections have been completed.
2. By Shelf Collection... You can also choose to exclude selected shelf locations For example: If you have a travel section somewhere in your library not interfiled with your non-fiction... you could inventory the NF excluding the Travel shelf location. Record Sets and Bulk changes are a good way to set shelf locations. Ask YRL for assistance if required.
3. By Collection... You can choose from a list of collections that are specific to your library.

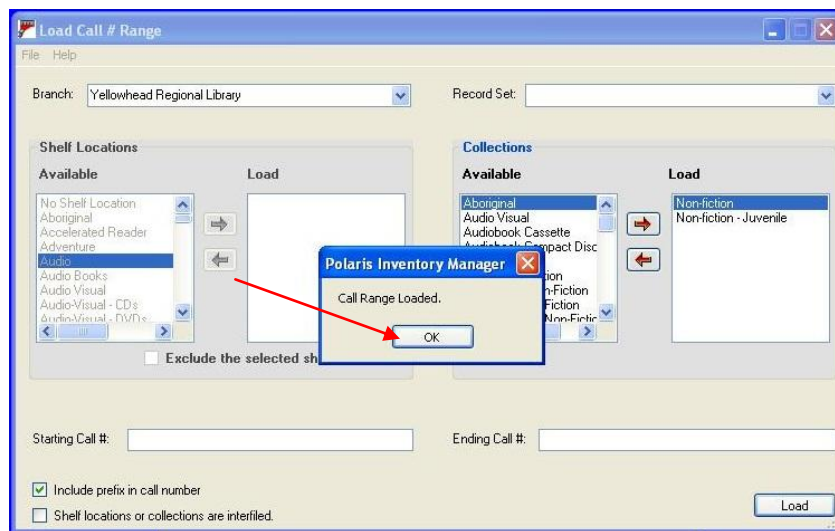
Notes:

- You may select more than one collection or shelf location at a time by highlighting it and moving them all to the LOAD field.
- It is important to ensure collection codes are correct. For example: When I started at my library, we had 67 collection codes, now we have 30. This can be corrected by using the Polaris Record Sets and Bulk change features.

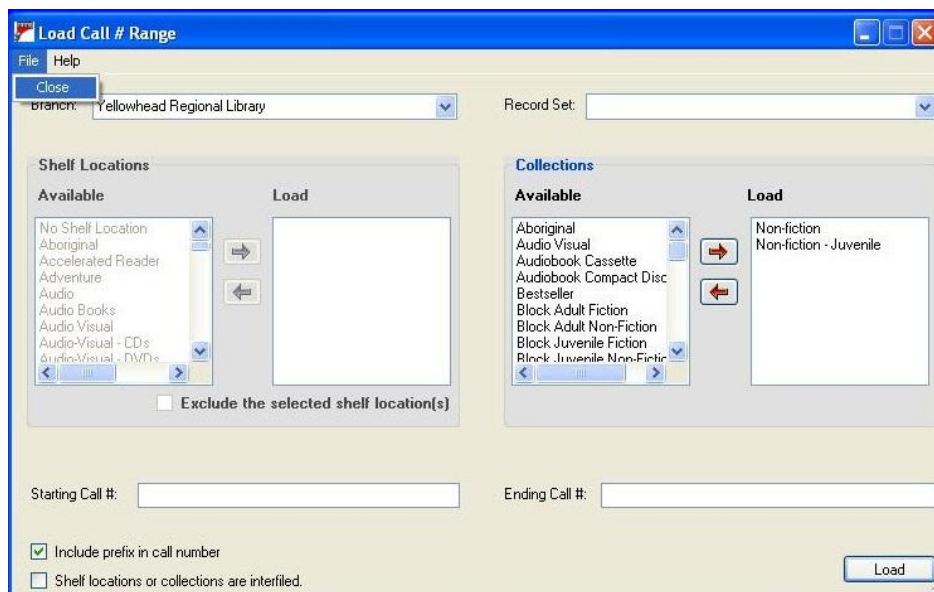
Click **LOAD** on the bottom right hand corner to gather the data from Polaris.



A pop up will appear saying Call Range Loaded. Click OK.



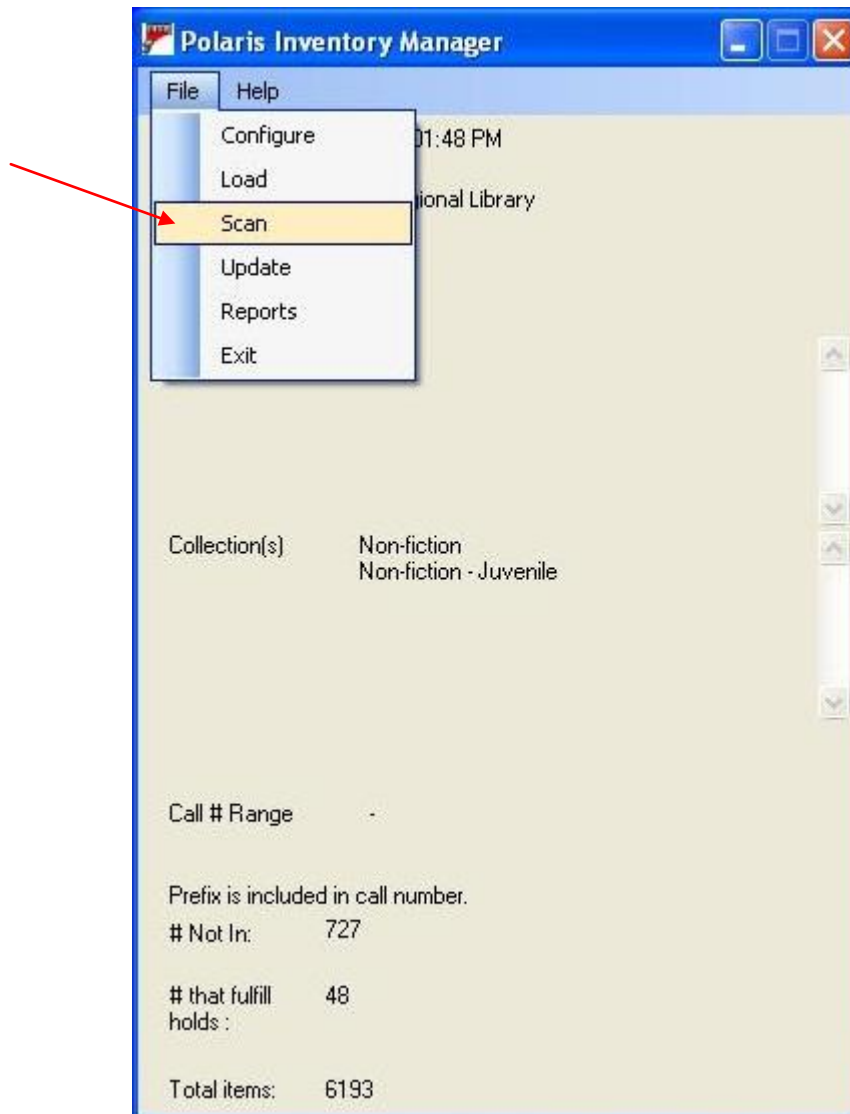
Select **Close** from the **File Menu**.



Now you are back to the *PIM Main Window* (below).

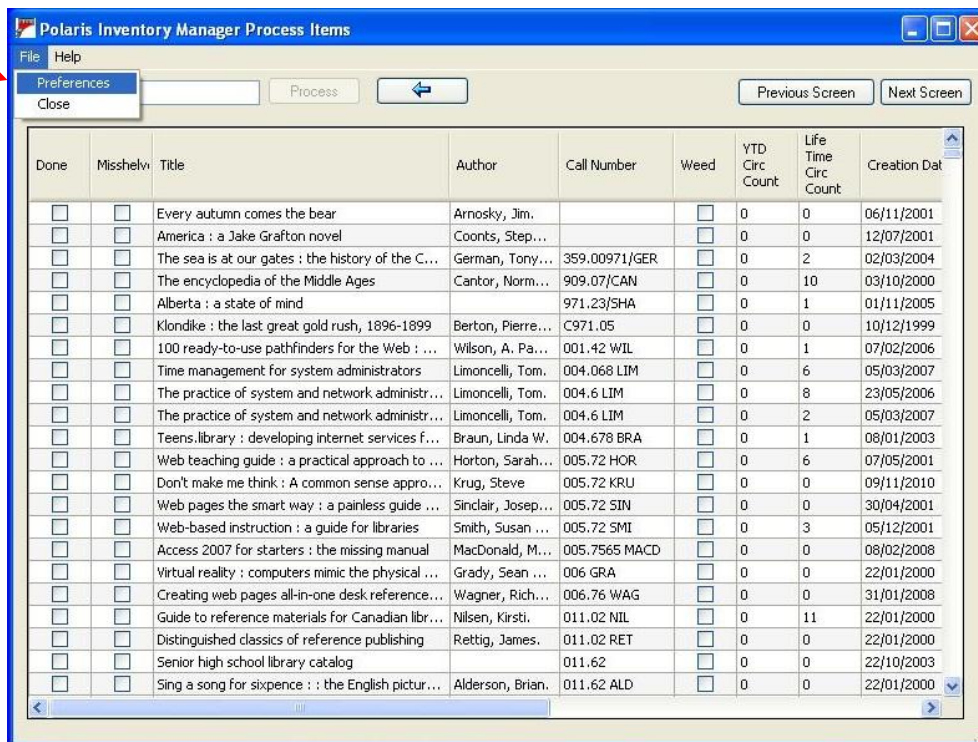
Step 2 SCAN

Choose **Scan** from the **File Menu**.

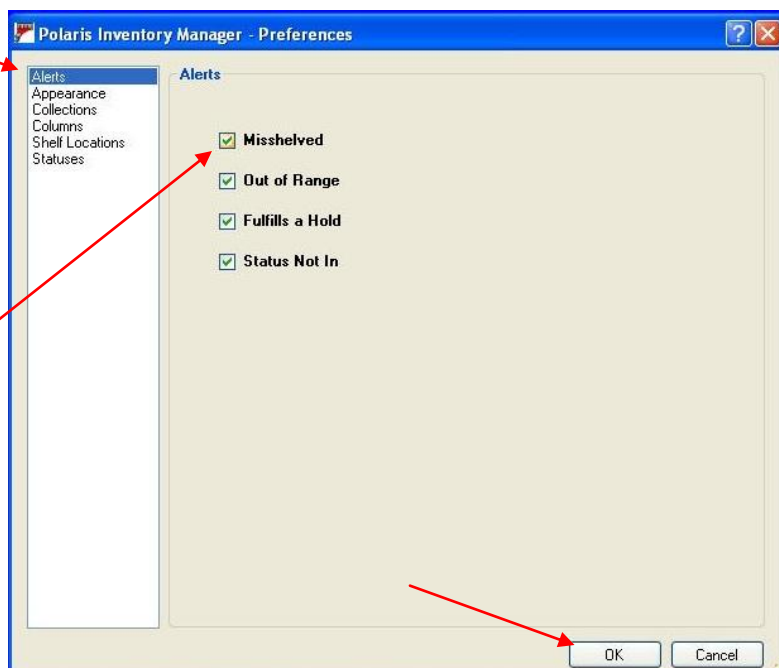


This is where you will see the list of titles that you just **loaded**. This is called the **Process Items Window/Inventory List**.

****Before you start scanning the first thing you will want to do is change the preferences so that if your items are not in perfect shelving order a pop up will not appear after each item you scan. To do this go to File>Preferences.****



Under **Alerts** checkmark **Missshelved** then press OK.



Scroll to the bottom of the list of items and click on the box marked done for the last item on your list.

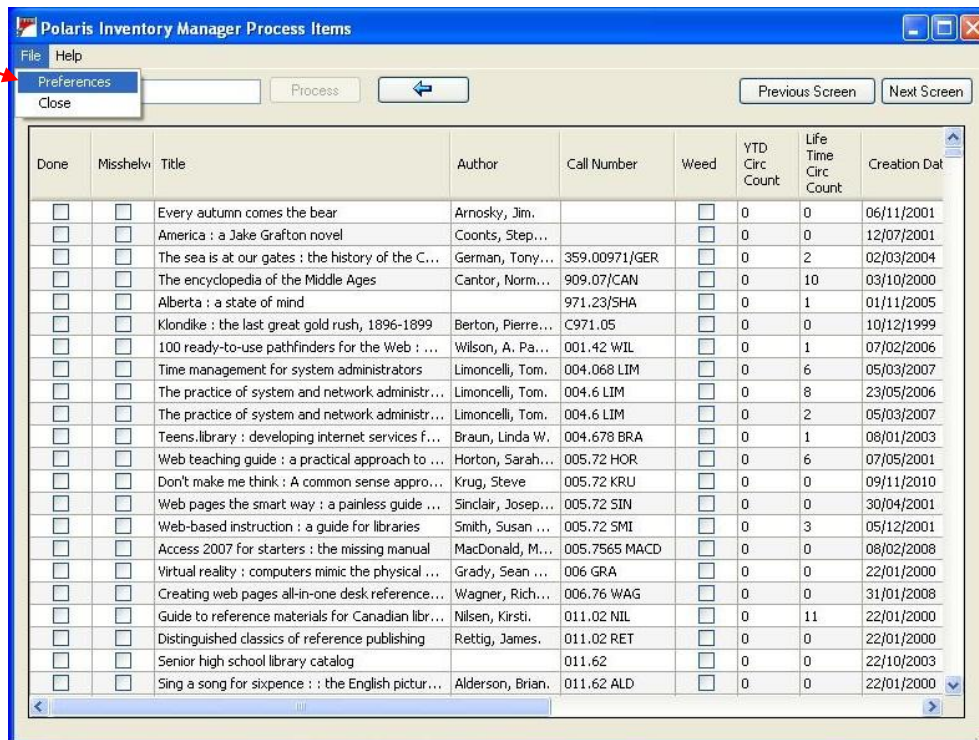
****You will need to keep track of this item and confirm that you do in fact have it.****

Done	Misshelved	Title	Author	Call Number	Weed	YTD Circ Count	Life Time Circ Count	Creation Date
☐	☐	Australia	Gray, Shirley W.	J 994 GRA	☐	0	2	17/04/2003
☐	☐	Aborigines of Australia.	Holder, Robyn.	J 994 HOL	☐	0	0	22/01/2000
☐	☐	Australia	Rau, Dana Me...	J 994 RAU	☐	0	9	03/02/2003
☐	☐	Aborigines	Smith, Anne.	J 994 SMI	☐	0	5	22/01/2000
☐	☐	Australia: a lucky land.	Stark, Al.	J 994 STA	☐	0	6	22/01/2000
☐	☐	The Peopling of Australia.	Treize, P. J. ...	J 994 TRE	☐	0	5	22/01/2000
☐	☐	Australia	Yanagi, Akino...	J 994 YAN	☐	0	10	22/01/2000
☐	☐	The aboriginal peoples of Australia	Bartlett, Anne.	J 994.004 BAR	☐	0	12	23/11/2001
☐	☐	Sydney	Hatt, Christine.	J 994.41 HAT	☐	0	4	05/02/2001
☐	☐	Australia : by Ann Heinrichs.	Heinrichs, Ann.	J 994.HEI	☐	0	13	09/06/2000
☐	☐	Fiji	NgCheong-Lu...	J 996.11 NGC	☐	1	8	09/06/2000
☐	☐	Rediscovering Easter Island : how history is l...	Pelta, Kathy.	J 996.18 PEL	☐	0	3	13/01/2003
☐	☐	Polar regions.	Bonner, W. Ni...	J 998 BON	☐	0	15	22/01/2000
☐	☐	Polar regions.	Bonner, W. Ni...	J 998 BON	☐	0	3	22/01/2000
☐	☐	The Arctic and its people	Bullen, Susan.	J 998 BUL	☐	0	2	22/01/2000
☐	☐	Into the ice : the story of Arctic exploration	Curlee, Lynn.	J 998 CUR	☐	0	2	22/01/2000
☐	☐	The Arctic land	Kalman, Bobbie.	J 998 KAL	☐	0	8	22/01/2000
☐	☐	The Arctic	Rootes, David.	J 998 ROO	☐	0	2	22/01/2000
☐	☐	Greenland.	Lepthien, Emili...	J 998.2 LEP	☐	0	4	22/01/2000
☐	☐	Antarctica	Pringle, Laure...	J 998.9 PRI	☐	0	18	22/01/2000
☐	☐	Rivers and lakes	Cumming, Da...	J 574526 CUM	☐	0	0	22/01/2000
☒	☐	Cowboys don't cry	Halvorson, M...	J C HAL	☐	0	0	10/12/1999

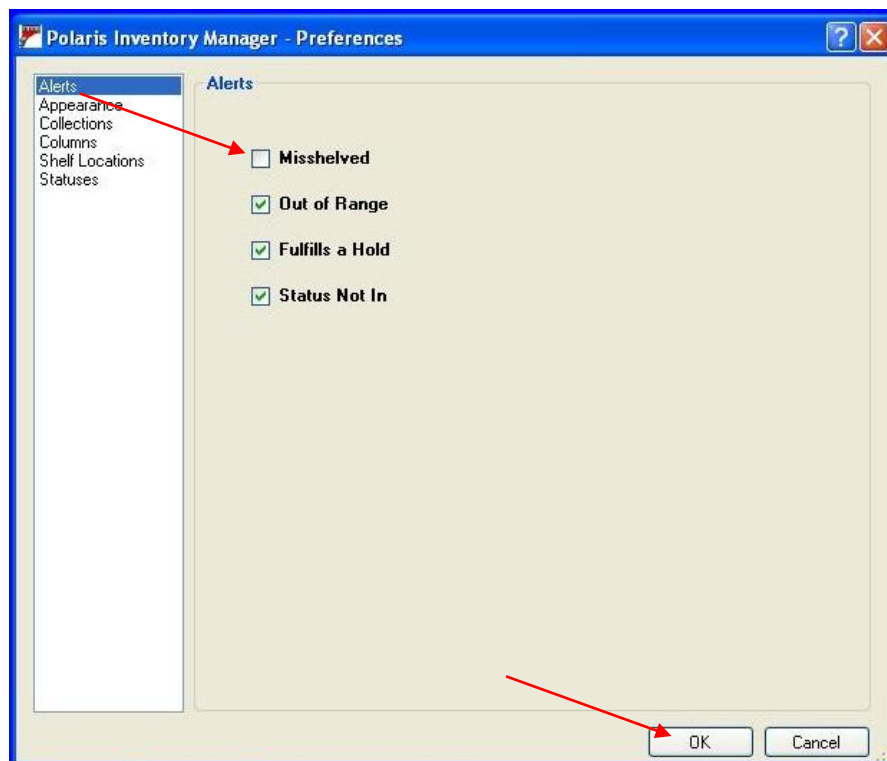
A pop up will appear asking "You have skipped a number of items? Is this item misshelved?" Click No

Done	Misshelved	Title	Author	Call Number	Weed	YTD Circ Count	Life Time Circ Count	Creation Date
☐	☐	Every autumn comes the bear	Arnosky, Jim.		☐	0	0	06/11/2001
☐	☐	America : a Jake Grafton novel	Coonts, Step...		☐	0	0	12/07/2001
☐	☐	The sea is at our gates : the history of the C...	German, Tony...	359.00971/GER	☐	0	2	02/03/2004
☐	☐	The encyclopedia of the Middle Ages	Cantor, Norm...	909.07/CAN	☐	0	10	03/10/2000
☐	☐	Alberta : a state of mind		971.23/SHA	☐	0	1	01/11/2005
☐	☐	Klondike : the last great gold rush, 1896-1899	Berton, Pierre...	C971.05	☐	0	0	10/12/1999
☐	☐	100 ready-to-use pathfinders for the Web	Wilson, A. Da...	001.43 WIL	☐	0	1	07/02/2006
☐	☐	Time management for sy			☐	0	6	05/03/2007
☐	☐	The practice of system a			☐	0	8	23/05/2006
☐	☐	The practice of system a			☐	0	2	05/03/2007
☐	☐	Teens.library : developi			☐	0	1	08/01/2003
☐	☐	Web teaching guide : a p			☐	0	6	07/05/2001
☐	☐	Don't make me think : A common sense appro...	Krug, Steve	005.72 KRU	☐	0	0	09/11/2010
☐	☐	Web pages the smart way : a painless guide ...	Sinclair, Josep...	005.72 SIN	☐	0	0	30/04/2001
☐	☐	Web-based instruction : a guide for libraries	Smith, Susan ...	005.72 SMI	☐	0	3	05/12/2001
☐	☐	Access 2007 for starters : the missing manual	MacDonald, M...	005.7565 MACD	☐	0	0	08/02/2008
☐	☐	Virtual reality : computers mimic the physical ...	Grady, Sean ...	006 GRA	☐	0	0	22/01/2000
☐	☐	Creating web pages all-in-one desk reference...	Wagner, Rich...	006.76 WAG	☐	0	0	31/01/2008
☐	☐	Guide to reference materials for Canadian libr...	Nilsen, Kirsti.	011.02 NIL	☐	0	11	22/01/2000
☐	☐	Distinguished classics of reference publishing	Rettig, James.	011.02 RET	☐	0	0	22/01/2000
☐	☐	Senior high school library catalog		011.62	☐	0	0	22/10/2003
☐	☐	Sing a song for sixpence : : the English pictur...	Alderson, Brian.	011.62 ALD	☐	0	0	22/01/2000

Click on **File>Preferences** again.



Now you will uncheck Missshelved and press OK.



Now – Scan your items in (or check them off using the check boxes – *not recommended*).

Done	Misshelvi	Weed	Status	Title	Fulfills Hold	Barcode	Call Number
☐	☐	☐	In	Eight spells a week # 17	No	39335014955053	YA
☐	☐	☐	Lost	the fire of friendship.	No	30100002788141	YA
☐	☐	☐	Missing	MYSTERY STORIES FOR GIRLS.	No	39335000623004	YA
☐	☐	☐	In	The bridesmaid	No	39335017207148	YA ABF
☐	☐	☐	In	Firegirl	No	39335020752718	YA ABF
☐	☐	☐	In	Swept away	No	39335011028946	YA ABF
☐	☐	☐	In	Into the dark	No	39335020753518	YA ABF
☐	☐	☐	In	The plague does	No	39335011027948	YA AD

Notes:

If a barcode does not scan properly, you can key in a barcode. Then select **Process**. The list jumps to the position of the keyed item and the **Done** box is checked for that item.

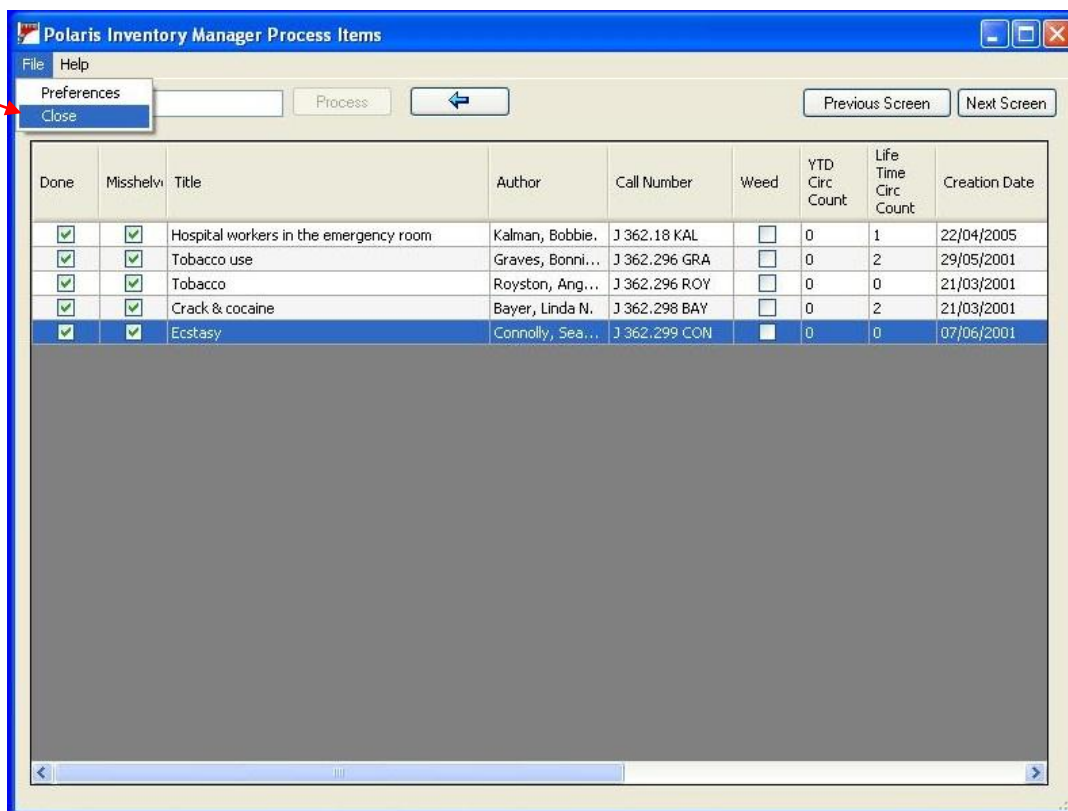
*If you want to mark items for **weeding**, select the appropriate check box for that item. These items can be listed on a report when you upload your inventory data into the Polaris database, and you can create a record set of the items at that time.*

Done	Misshelvi	Title	Author	Call Number	Weed	YTD Circ Count	Life Time Circ Count	Creation Date
☐	☐	Illustrated history of women : winning throug...	Franck, Irene M.	J 305.409 FRA	☐	0	2	26/06/2000
☐	☐	19th century girls & women	Kalman, Bobbie.	J 305.409 KAL	☐	1	5	22/01/2000
☐	☐	Women in a changing world, 1945-2000	Macdonald, Fi...	J 305.409 MAC	☐	0	3	07/06/2001
☐	☐	Women in ancient Rome	Macdonald, Fi...	J 305.409 MAC	☐	0	0	27/09/2000
☐	☐	Women in medieval times	Macdonald, Fi...	J 305.409 MAC	☐	0	7	27/09/2000
☐	☐	Women in peace & war, 1900-1945	Macdonald, Fi...	J 305.409 MAC	☐	0	6	07/06/2001
☐	☐	Her story III : women from Canada's past	Merritt, Susan...	J 305.409 MER	☐	0	10	24/05/2000
☐	☐	Ancient Greek women	Middleton, Ha...	J 305.42 MID	☐	0	2	20/05/2003
☐	☐	Feminism	Stearman, Ka...	J 305.42 STE	☐	0	0	03/06/2008
☐	☐	Women's rights : changing attitudes 1900-2000	Stearman, Ka...	J 305.42 STE	☐	0	3	08/06/2000
☐	☐	A Samurai warrior	Steel, Anne.	J 305.52 STE	☐	0	3	22/01/2000
☒	☒	A people apart	Kenna, Kathle...	J 305.687 KEN	☒	0	3	22/01/2000
☐	☐	Racism	Garg, Samidha.	J 305.8 GAR	☐	0	5	22/01/2000
☐	☐	Racism : changing attitudes 1900-2000	Grant, R. G.	J 305.8 GRA	☐	0	9	08/06/2000
☐	☐	Racism	Gundara, Jag...	J 305.8 GUN	☐	0	5	03/05/2001
☐	☐	They sought a new world : the story of Euro...	Kurelek, Willia...	J 305.8 KUR	☐	0	2	22/01/2000
☐	☐	Let's talk about race	Lester, Julius.	J 305.8 LES	☐	0	7	15/04/2005
☐	☐	The search for a new homeland : Polish and ...	Palmer, Howa...	J 305.8 PAL	☐	0	8	22/01/2000
☐	☐	Special Canadian communities.	Schemenauer...	J 305.8 SCH	☐	0	7	22/01/2000
☐	☐	I have a dream	King, Martin L...	J 305.896 KIN	☐	0	3	22/01/2000
☐	☐	Inuit.	Edmunds, Hel...	J 305.897 EDM	☐	0	7	22/01/2000
☐	☐	Hands around the world : 365 creative ways ...	Milrod, Susan.	J 306 MIL	☐	0	11	22/01/2000

The following messages may appear in a popup while scanning items (*the computer will make a different sounding beep if one of these messages comes up*):

- **Item not found in the current call number range** – Select **OK** on the message box and set the item aside. When you update the Polaris database, a .txt file that lists the out-of-range barcodes is automatically created. This means the item currently has another collection code or shelf location listed for it and will need to be corrected. You can view and update these items in the Polaris Staff Client later.
- **Item's status is not *IN*** – For example: the item may be checked out or marked LOST. Select **OK** on the message box and set the item aside. These items should be checked in using circulations functions in the Polaris Staff Client later.
- **The status of this item is [status]** – Select **OK** on the message box and set the item aside for appropriate processing later.
- **Item fills a hold request** – Select **OK** on the message box and set the items aside. Check them into the Polaris Staff Client later to transfer the item for ILL.

Select **File, Close**, or select **X** in the upper right hand corner of the **Process Items** window when you are finished scanning the section for the day or if you are finished the section entirely.



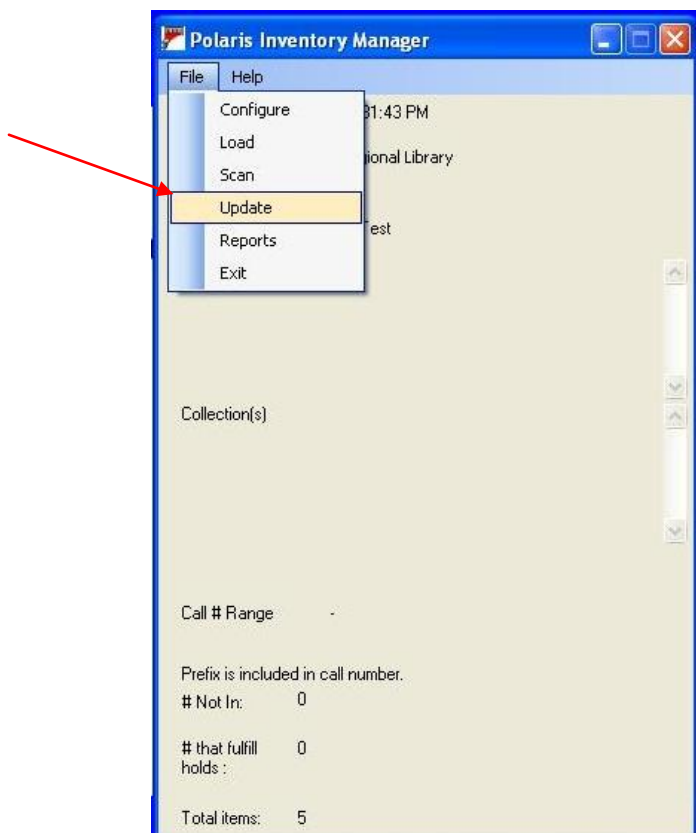
The main window appears. You can resume the inventory at any time. To resume the inventory you will just go back to **File>Scan** and you will see the listing of items with the items already scanned checked off. When you have finished the set of items, you are ready for **Step 3**

Step 3 UPDATE THE DATABASE

When you update the Polaris database with your inventory data, the inventory date for the relevant items is updated and an Inventory Statistics report is automatically generated as a .pdf file. The report contains information such as the update date and time, the date and time the item information was loaded, branch and call number range or record set, and totals.

**** If you have not attached the USB stick that came with the PIM attach it now****

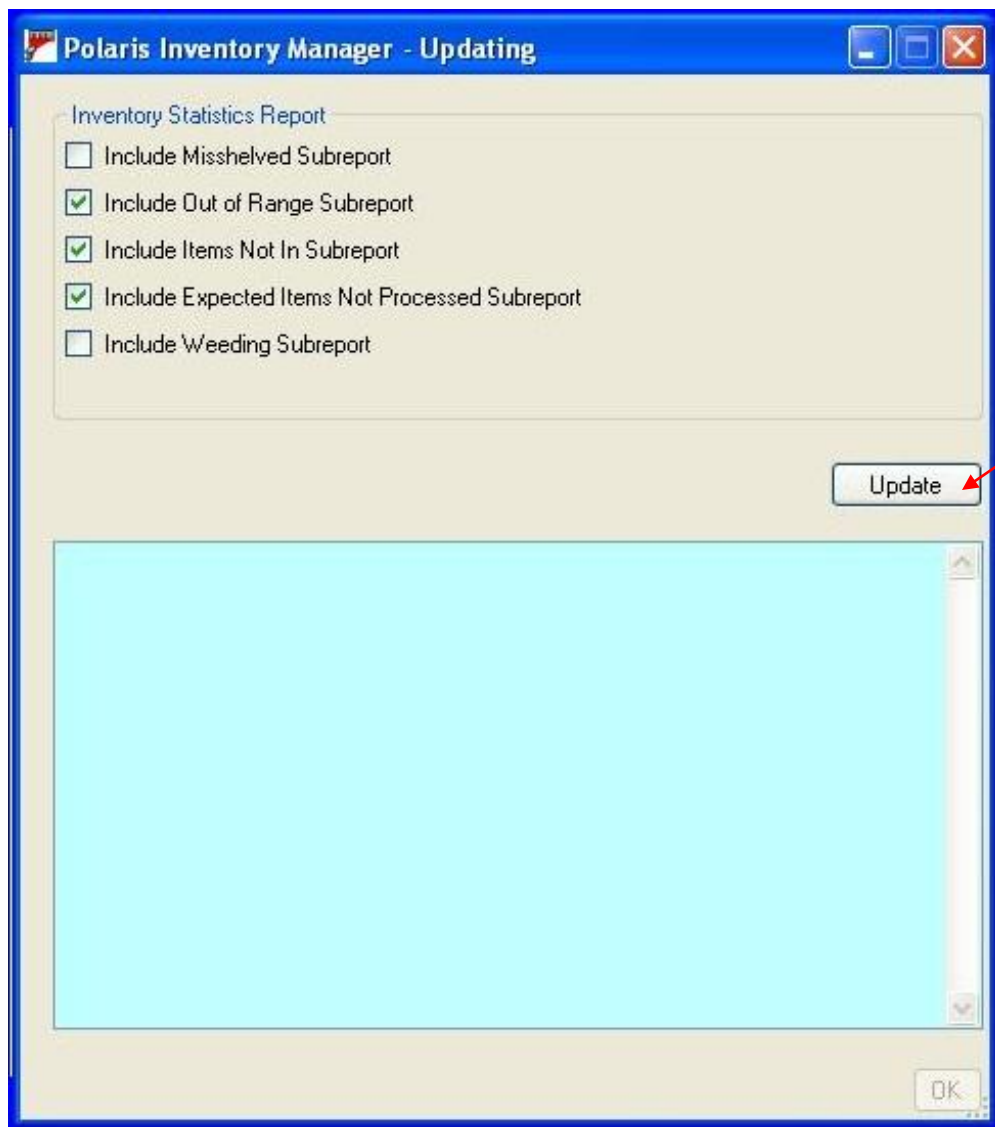
To update ***first make sure you have a network connection.*** Next click on File>Update.



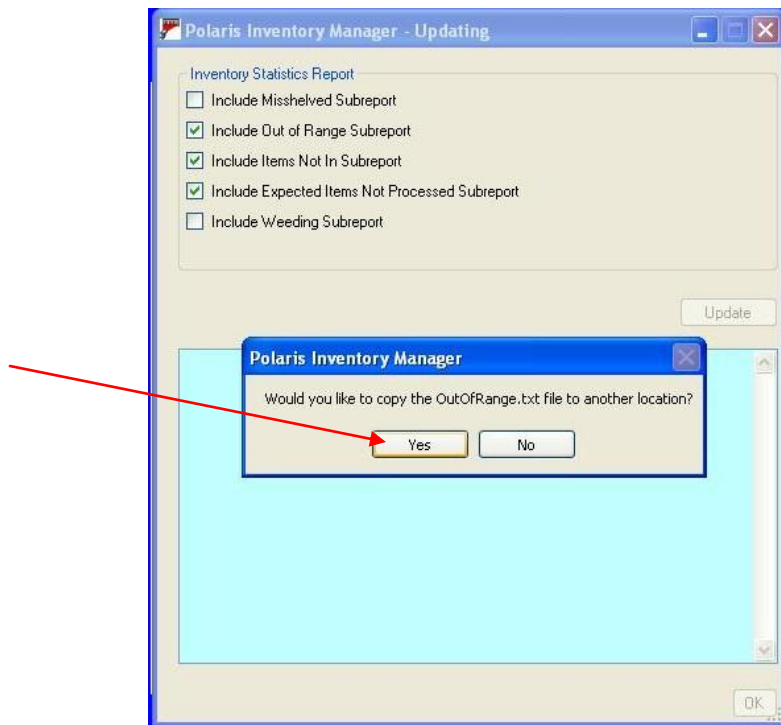
You can select any or all of the following sub-reports to include in the *Inventory Statistics* report:

- Misshelved sub-report
- Out-of-range sub-report
- Items *Not In* sub-report
- Expected Items Not Processed sub-report
- Weeding sub-report

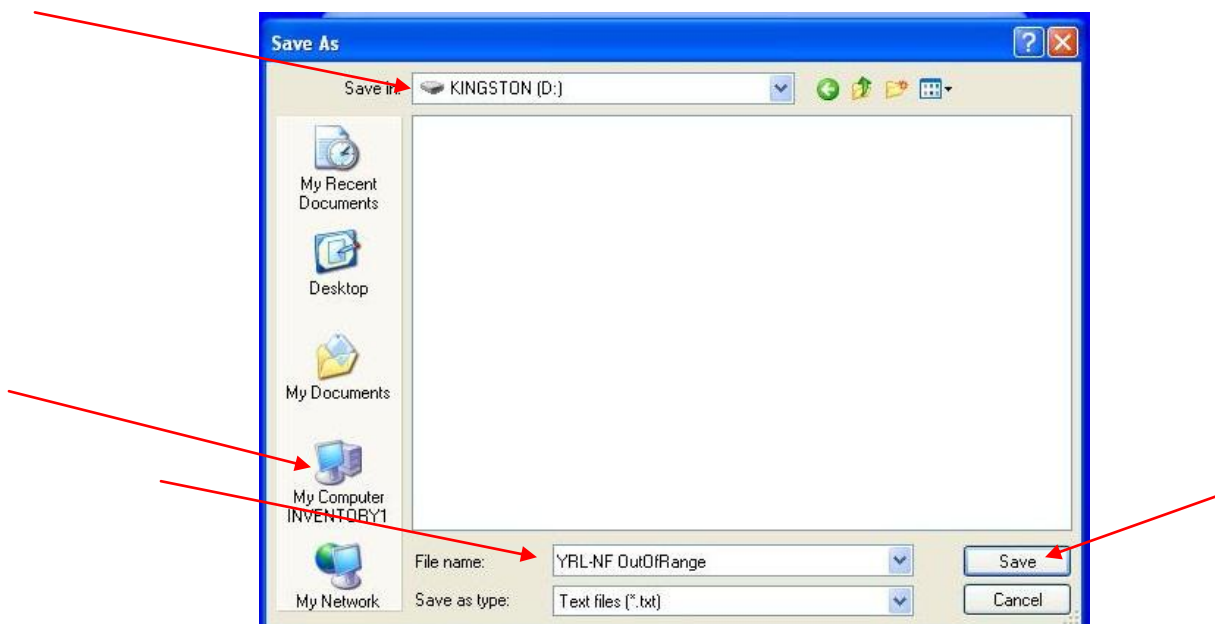
Most commonly you will uncheck the Misshelved subreport and the Weeding subreport and leave the middle three checked. (If you marked off items during the scan for weeding you will want to leave the Weeding subreport checked. Next you will click on **Update**.



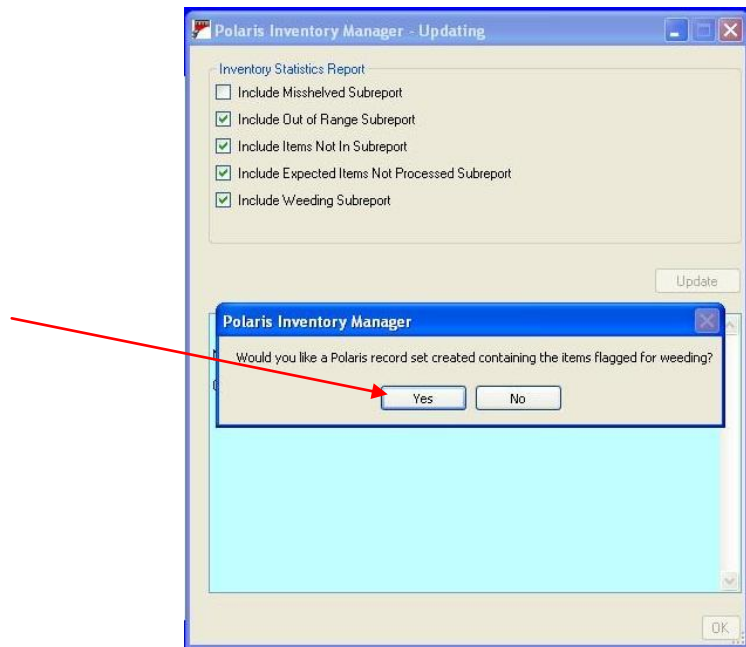
A screen may pop up stating “Would you like to copy the OutOfRange.txt file to another location?” Click on Yes.



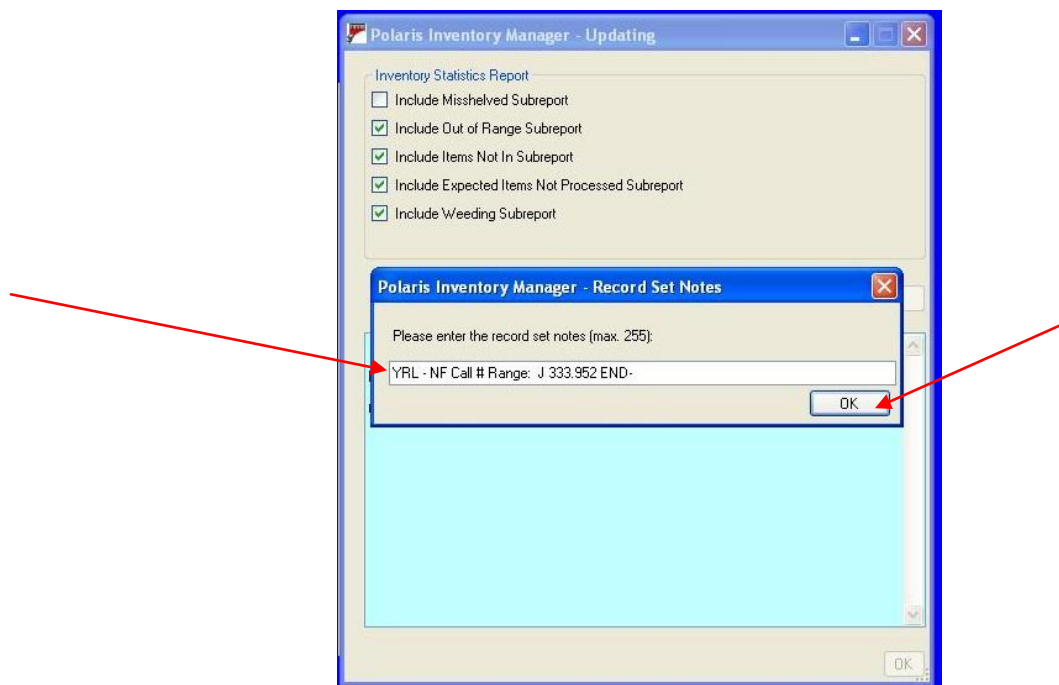
A new screen will pop up letting you choose where you would like to save the .txt file. Locate the USB by double clicking on My Computer on the left. You will see the USB key (it may be called Kingston or YRL2010). Double click on it so that you see the name of the USB key in the Save in: section. For the File name: Add your library code and collection name or collection code to the beginning of the file name OutOfRange. Click on Save.



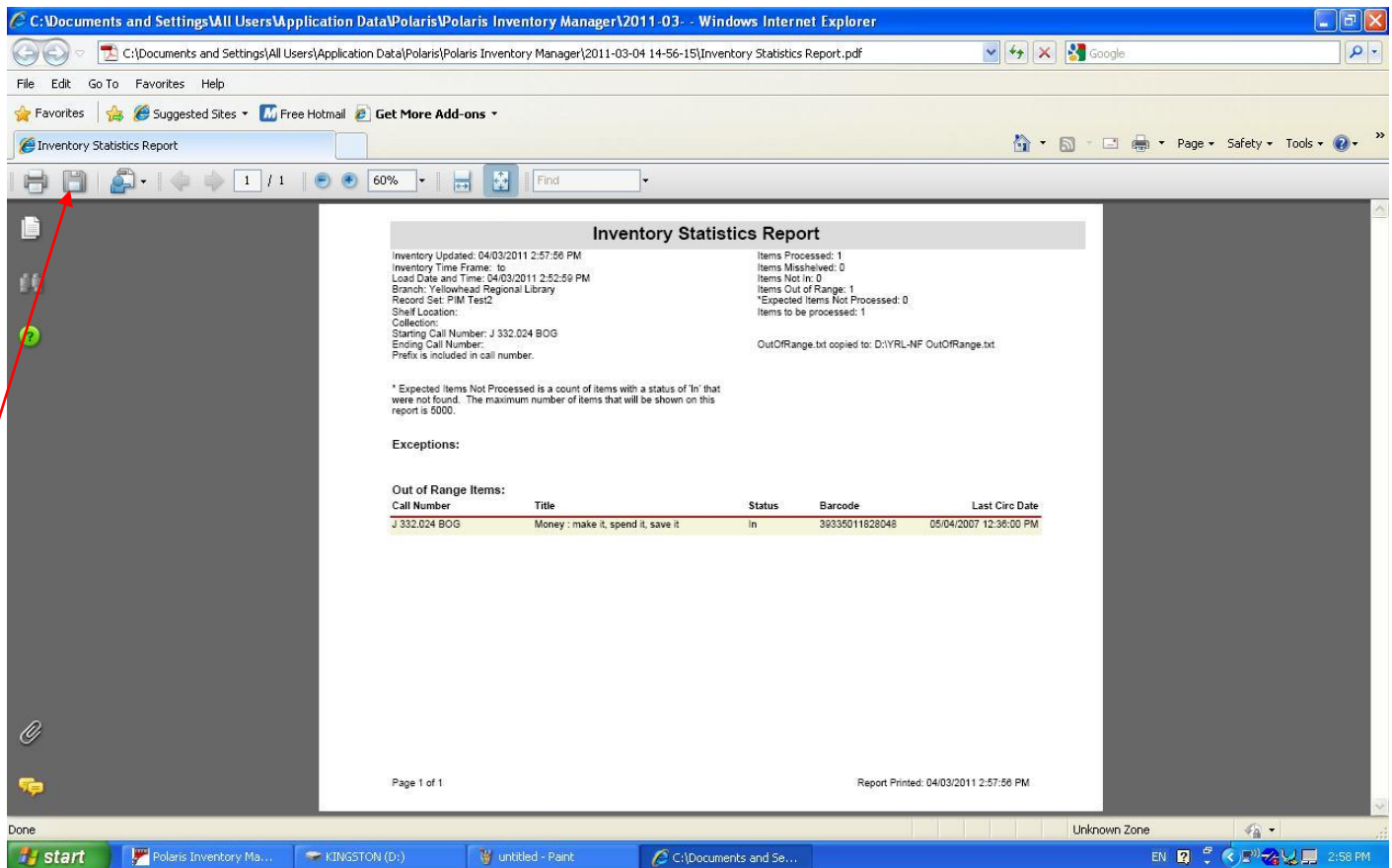
If you checked off items for a weed a pop up will appear asking if you would like to have a record set created containing items flagged for weeding. Click on Yes. A new pop up will appear letting you add in a name for the record set. Again add your library code and collection name or collection code to the beginning before the rest of the information listed. Click on OK.



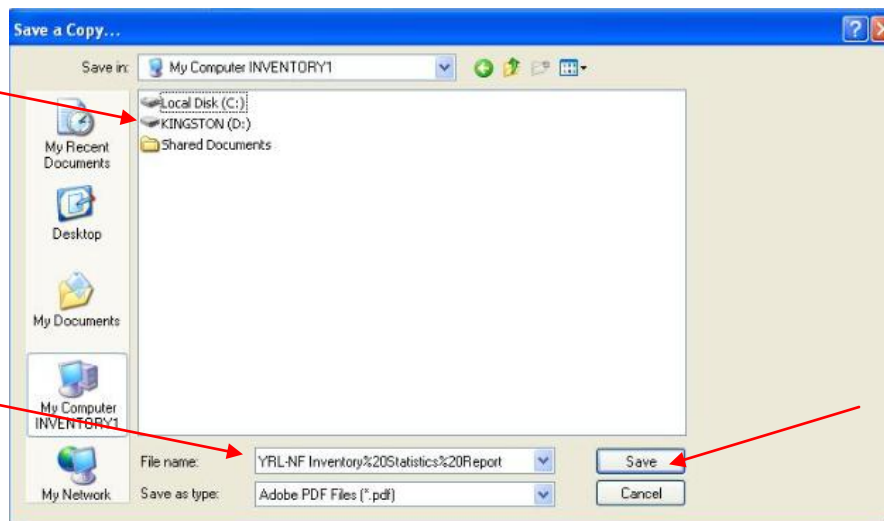
Next a pop up will come up asking if you would like to have a record set created of expected items not processed. Click on Yes. A new pop up will appear letting you add in a name for the record set. Again add your library code and collection name or collection code to the beginning before the rest of the information listed. Click on OK.



A new window will appear of a PDF document of the Inventory Statistics Report. This report gives you detailed information about your collection. Click on the Save icon.



Save the PDF file on the USB key like you did with the OutOfRange.txt file. Include your library code and collection name or collection code to the beginning before the rest of the information listed.



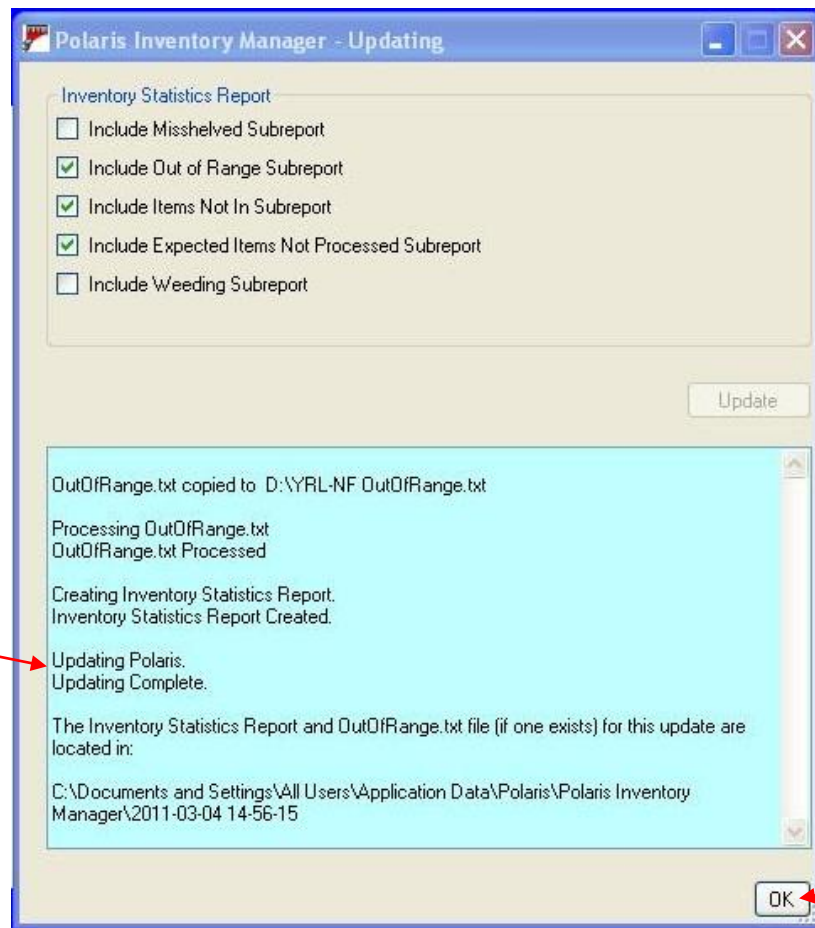
You can now close the PDF window.

Once the update is finished you will see some information appearing. Make sure before you press OK that you see that it says:

Updating Polaris

Updating Complete

Once you see this you can press OK.



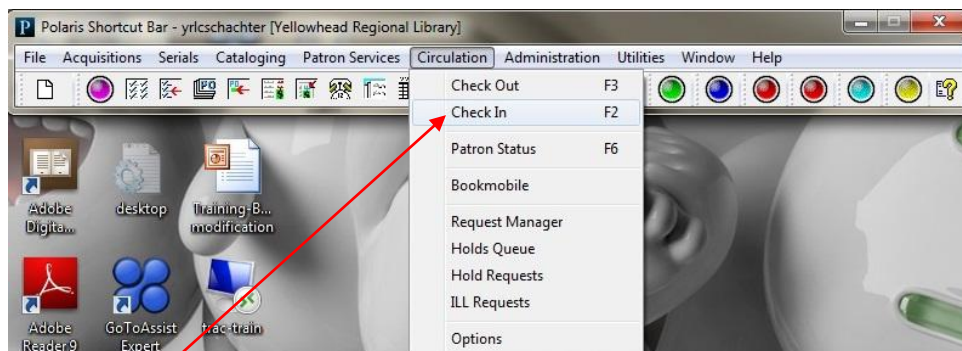
You can now load the next collection to inventory or if you are finished you can exit PIM.

To exit select **File, Exit** to quit PIM.

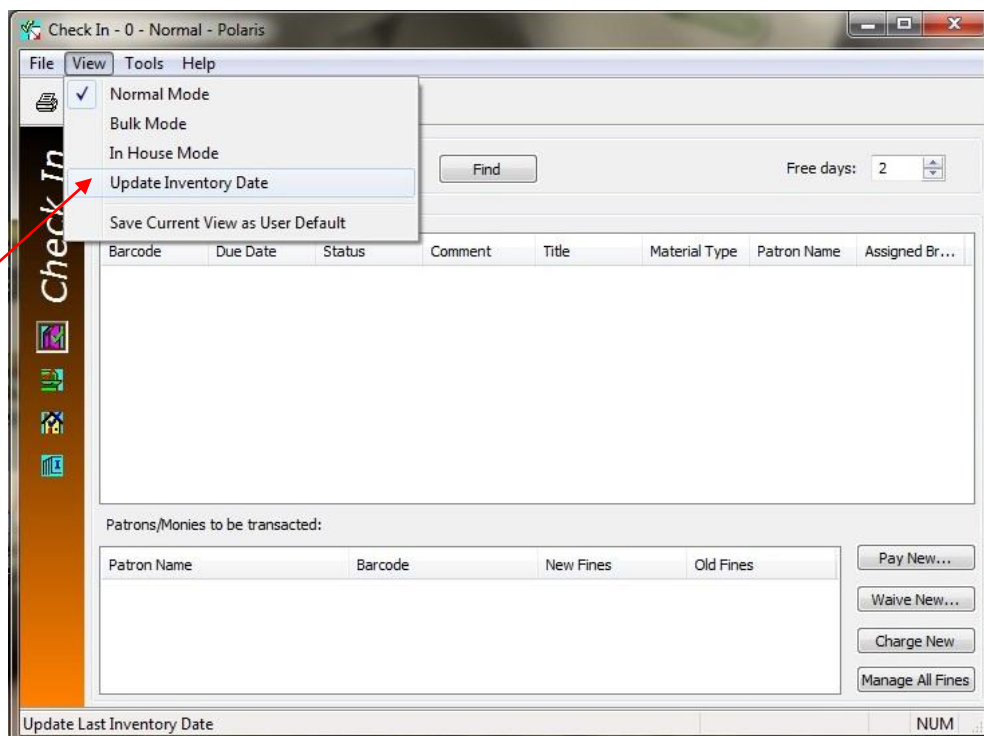
*****When you are finished inventorying all of the collections you will need to take the USB key and load all of the files onto your own computer. Once this is done you will need to update the inventory date of all of the Out-of-Range Items.*****

How to update the inventory date of the Out-of-Range Items

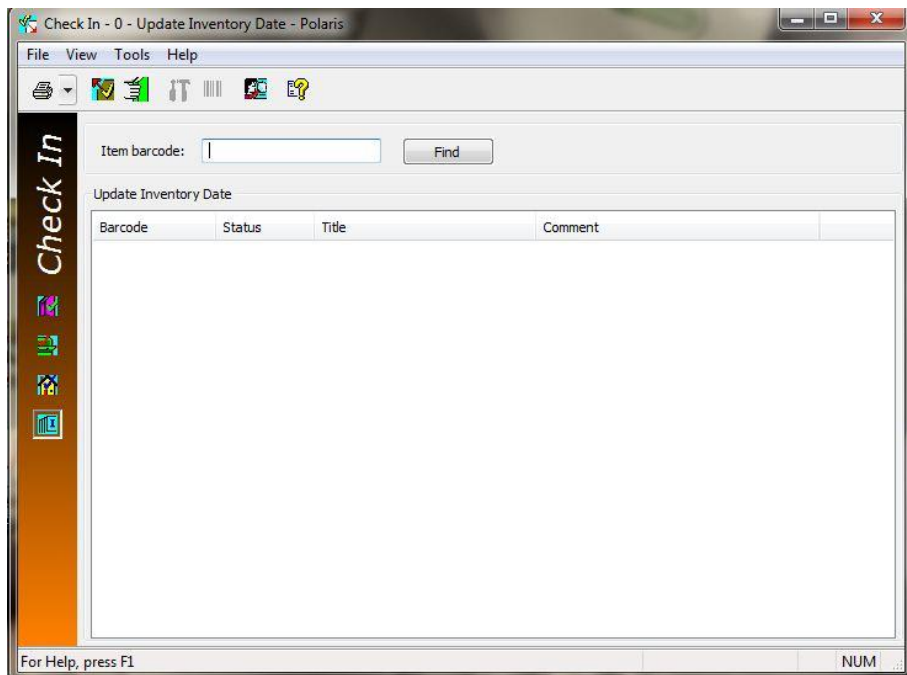
1. Log into the Polaris Staff Client on your computer that now has all of the files from the USB key loaded onto it.
2. Select **Circulation, Check In**



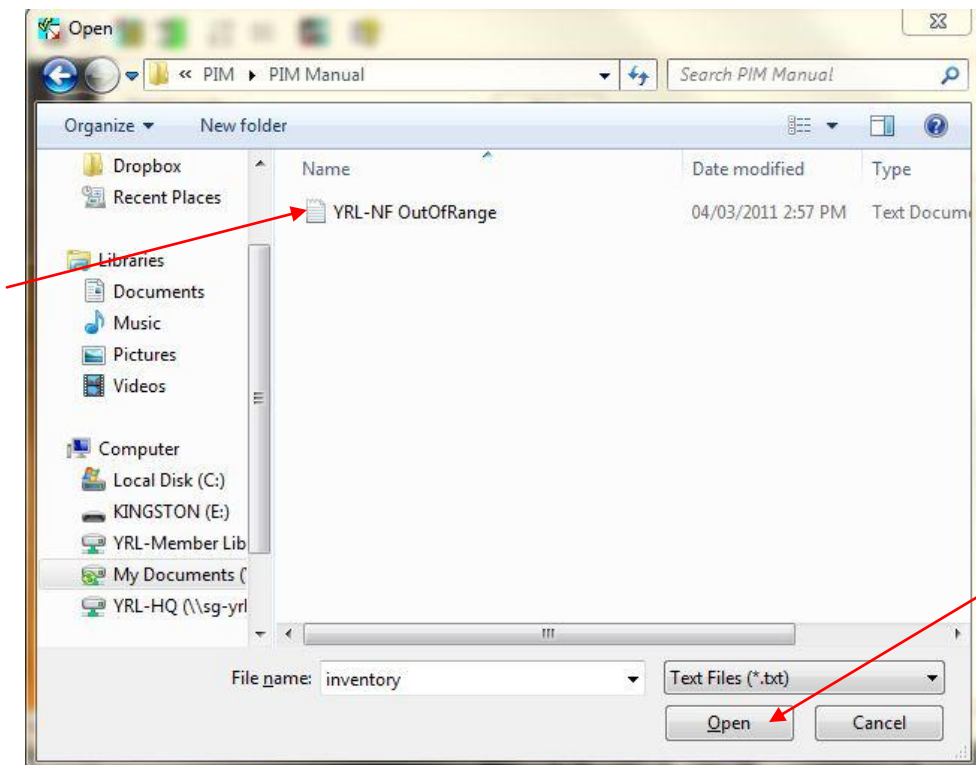
3. Select **View, Update Inventory Date**



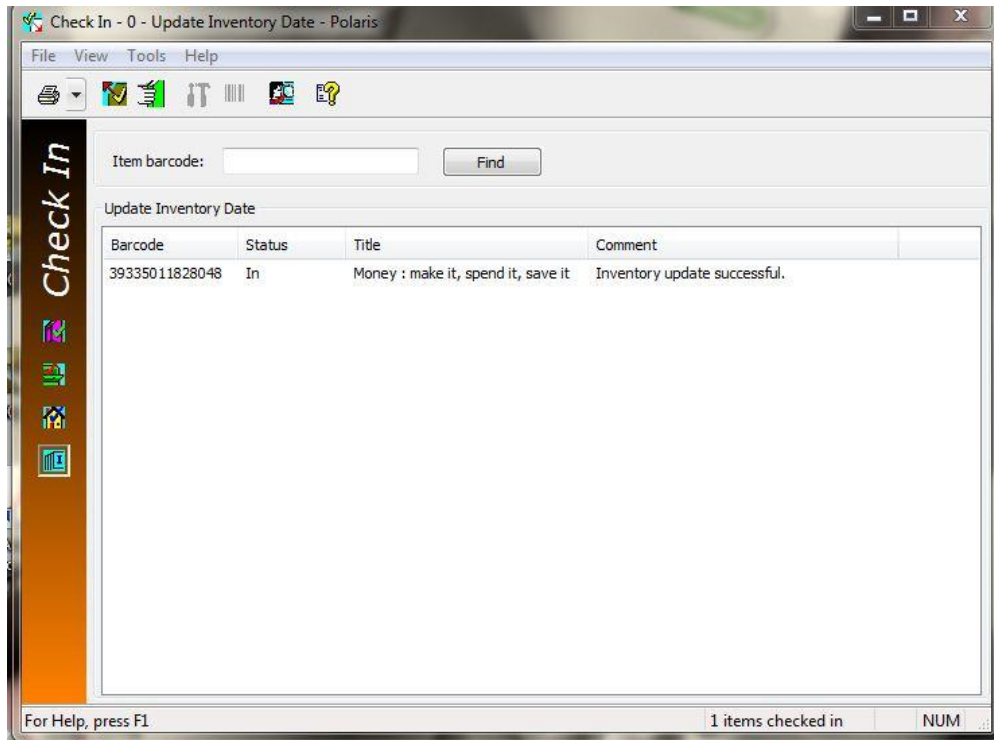
4. When the below screen appears press **CTRL+ALT+I**
(An explorer window will open.)



5. Locate where you put all of the files and select the first **OutofRange.txt** file. Next click on Open.



6. All of the Out of Range items will be inventoried. A number of pop ups may appear. You can just keep pressing OK. For each item, the Comments column lists whether the inventory date was updated successfully and any other pertinent information. Repeat steps 4 and 5 for every single Out of Range file that you have.



CONGRATULATIONS!

**YOU HAVE NOW COMPLETED THE INVENTORY!
WELCOME TO POLARIS INVENTORY MANAGER!**

Easy as 1-2-3