

Polaris Manual for Shared System Staff

2024-25

IndyPL Shared System Staff

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Shared System site: WeShare.indypl.org

IndyPL site: IndyPL.org

Catalog: indypl.bibliocommons.org

Kids' Catalog: indyplkids.bibliocommons.org

Booklists from Shared System libraries, Awards, and IndyPL Children's Librarians:

<u>Indyplkids.bibliocommons.com/explore/featured_lists/staff_picks</u>

IndyPL HELP Desk for IT Questions Only

(for example, no connection to Polaris LEAP, catalog not working, printer set-up)

317-275-4900

Bookmark this link to LEAP:

Polaris Manual ii July 2024

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Keeping Track of Library Cards and Circulation

Card Numbers by Classroom

Many schools like to keep track of library cards by class. You will be able to create Record Sets by class in Polaris. This will allow you always to have the most current library card number in front of you.

You will be able to produce lists of students and their barcode numbers. This will help teachers when they want to work with their class to request materials online, check out ebooks, or use Library search apps. NOTE: You will be able to get lists of overdue, damaged and long overdue materials by class since you have made record sets in Polaris!

Creating a Scannable Barcode for a Single Borrower

For those of you who keep a notebook at the circ desk with copies of your student library cards, you may want to know how to create a <u>scannable</u> barcode. This can save tracking down library cards left at home, and can also help when, for example, a library branch replaces a lost library card over the summer. Note that the card number will be in LEAP. If you are using record sets, you won't need a print copy. The directions can be found in <u>Appendix D</u>.

Library Cards - User Only

Library cards belong to individual students. Any transactions made on a library card must be done by the student. This means that a brother/cousin/friend/teacher may not check out books on a library card that is not their own. Once you allow this to happen, and an item is lost, you have opened yourself up to the excuse of "I never checked that book out."

Finding "who had it last"

Find the item in LEAP and look at the circulation history. You will find the name of the last person to check out the item.

Earn and Learn Program

First tested in 2012, the Earn and Learn program is a much-needed response to the incidence of debt and the reluctance of families to allow their children to use library resources. It was also created to resolve the debt incurred by parents on their child's library card before the child reached adulthood. Its stated purposes are:

- To allow children under the age of 18 with library card debt to become borrowers in good standing and learn new behaviors for responsible library use.
- To bring student library users into the public library by removing the barriers of debt and embarrassment.

IndyPL specifically invited the Shared System to play an active role in the Earn and Learn program in order to broaden its reach. As you can imagine, some families with debt are reluctant to visit their library branch but may encourage their children to participate because they trust the school and the school library.

Purpose: To encourage students and families to use the public library by removing the barriers of debt and embarrassment.

Objectives:

- Frequent communication with parents to include as many as possible of the following: face to face; school newsletter; school website; principal emails; library emails; SMS messages; phone calls; backpack mail
- 2. Loan limits use yours if more stringent (use three as the limit if patron code is Juvenile Exception)
- **3. Redemption program** –Shared System library managers will talk with branch library circ supervisors to ensure full debt is addressed.

Help library staff talk with students about good habits for library card use. These include library instruction as well as your "talking points" when checking out (for example, how many books do you need between visits to the library? Or, we share these materials with everyone in the school and the city – it's not fair for you to keep them if you're not using them.)

The message we hope school libraries convey is about responsible use of library materials.

- We share library materials with everyone in this whole school, and with the whole city.
- When we lose a book, CD or DVD, that means someone else in our school or city can't use it.
- What is enough? We should always have a backup book, but how many more things do we need to have checked out? Taking out just enough makes it easier for us to keep track of our stuff and stay debt-free!

Children **under the age of 18 years** with library card debt of \$5.00 or more may participate. Debt may be at school or public library. Debt will be for lost or damaged materials since all debt for fines has already been eliminated.

To find out who is eligible at your school, use the Find Tool in Leap to Find Patrons.

- 1. Choose Account Charges and put in the range of debt to look for, perhaps \$5.00 to \$1,000.
- 2. Use the filter to choose your library as the Patron's Registered Library.
- 3. Add a second filter to include only patrons whose cards expire after today through ten years from now.
- 4. Click the magnifying glass to see the list.
- 5. Sort by Patron Code to see who is already in Earn and Learn.

You may also see the debt as students check out. You may choose to waive fines or fees at YOUR location, but not at IndyPL locations. For example, you might want to waive a \$5.00 lost book fee from a book owned by your schools from five years ago.

High school students are "strongly encouraged" to participate as the opportunity to waive debt disappears at 18.

How they participate:

Students may register at school or at the public library. Both sides are asked not to change registration in Earn and Learn (Patron Code Earn and Learn) without consultation once a student registers. During the summer, public library staff will register students. During the school year, Shared System library managers will register students.

Library manager reviews current debt and approaches students and their families to invite them to participate. The benefits to students and their families should be apparent!



The library manager changes the account of the child from the current Patron Code to EARN AND LEARN.

Because students are registered for a full *calendar* year, collaboration between summer library and school library staff is vital.

During the summer, the public library or the parent will have the point card. During the school year, the school library will keep the point card on file in the

library in a secure place! You might want to keep a copy of the card in case it gets lost over the summer. You can look at individual student accounts to see if any money was waived over the summer.

If your loan limit is less, use your loan limit.

Be aware that if a student goes to a public library branch, they may exceed your loan limit.

Participants are allowed to check out any book materials including juvenile, teen or adult.

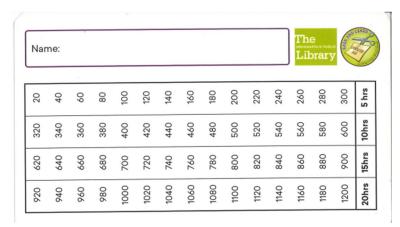
Participants are also allowed to check out CDs and audiobooks as part of their 10 items.

What is enough? We should always have a backup book, but how many more things do we need to have checked out? Taking out just enough makes it easier for us to keep track of our stuff and stay debt-free!

Student participants may not check out DVDS.

Managers may choose to enforce the universal policy, or approach it on a case-by-case basis (for example, allowing circulation of nonfiction DVDS to support curriculum)

The 10-item loan limit and restriction from DVD check outs remain in effect until students have completed the one-year program. Otherwise, participants have full library privileges including card holder computer time and book requests.



Since you are keeping track of books read, remind students not to use the book drop to return books. Nor will they be able to return books in their classrooms. It is up to each library manager to decide whether to verify that they have indeed read the books.

Branch library circ supervisors and school library managers will notify each other when milestones are reached. To make it simple, each is responsible for waiving ONLY the

debt incurred at their location. Even though you will see public library debt, it will be more consistent to allow each side responsibility for their own debt.

Please feel free to experiment with this at your school. You might use it with lower grade students who need the extra help, or with upper grade students who take longer to finish their books!

Books returned late do not receive EARN AND LEARN debt reduction credit. Check due dates before checking in.

Students should receive date due slips. You really need to have a receipt printer!

Note that if their debt rises, it still is reduced by the respective percentages.

Please do not allow siblings, friends or family to accrue points for the student.

The EARN AND LEARN participant remains in the program with a 10-item limit, no DVDs until a full year elapses, even after they reach 600 points and have a debt free library card.

When one year has expired, you can renew their card as a juvenile patron and restore their full borrowing privileges.

Communication with Families

Schools should send an email or note home so families know about the program.

When you see a student has read off all their debt, celebrate! To add emphasis, ask your principal to send a congratulatory note. School library managers may draft the letter and prepare it or one may be suggested by the Shared System office.

School libraries might include promotional information in parent packets at the beginning of the year and keep a supply on hand for transfers and for those who don't read everything in their packets! This program is available at school only to Shared System students!

Damaged Items

NOTE: Any item covered in a hazardous substance (mold, bugs, mildew, gasoline, body fluid) should not be kept on the damaged shelf. Place in a secure ZipLoc bag. Copy down the barcode number, then discard the item outside in the dumpster. Add a charge to the Patron Account immediately. Make a note when you add the charge that it had to be disposed of due to its condition.

Your Items Returned Damaged to You

- 1. Location notifies patron that item is damaged and there will be a charge
- 2. Location adds charge to the Patron Account
- 3. Location attaches a copy of the damaged notification to the item and places on appropriate shelf
 - o If patron pays for item, location gives item to patron
 - o After 30 days, location pulls the item and discards it

IndyPL or Other Location Items Returned Damaged to a Shared System Location

- 1. Patron returns damaged IndyPL item to Shared System location
- 2. Staff member writes down patron name and attaches note to item.
- 3. Location notifies patron that item is damaged and there will be a charge
- 4. Location adds charge to the Patron Account
- 5. Location checks item out to Damaged Shared System Card 21978066743818
- 6. Locations fills Shared System online form: https://forms.gle/LhtQQHEDT1cmHUsK6
 - a. Sh Sys receives notice that form has been filled in
 - b. Sh Sys withdraws item from system
- 7. Location attaches a copy of the damaged notification to the item and places on appropriate shelf
 - a. If patron pays for item, location gives item to patron
 - b. After 30 days, location pulls the item and discards it

Your Items Returned Damaged to a Branch

- 1. Patron returns damaged Shared System item to branch
- 2. Branch fills out IndyPL's "Damaged Item Form"
- 3. After filling out the damaged form, branch attaches it to the damaged item
- 4. Branch composes and mails a damage letter
- 5. Branch charges the patron
- 6. Branch checks item out to Damaged Shared System Card 21978066743818
- 7. Branch fills out Shared System online form: https://forms.gle/LhtQQHEDT1cmHUsK6
 - o Sh Sys receives notice that form has been filled in
 - Sh Sys withdraws item from system
- 8. Branch attaches a copy of the damaged letter to the item and places on appropriate shelf
 - o If patron pays for item, branch gives item to patron
 - After 30 days, pull the item and throw away

Items in Poor Condition Sent to Fill a Patron Request

- 1. Item comes in from another location in poor condition to fill a hold at your location and you do not wish to give to your patron
- 2. Check item in
- 3. Say no, you do not want to hold for patron
- 4. Say yes, you want to renew request for patron (NEVER delete a request)
- 5. Check item out to Damaged Shared System card 21978066743818
- 6. Complete form at: https://forms.gle/LhtQQHEDT1cmHUsK6
 - o Sh Sys office receives notice that form has been filled in
 - Sh Sys office makes item holdable only at owning location
- 7. Attach a polite note about damage to item (i.e, don't want to further damage this item by checking it out to a patron)
- 8. Send item in interoffice library envelope back to owning location to prevent it from trapping a hold
- 9. Owning location checks item in (no hold will be trapped unless someone at their location has requested the item)
- 10. Owning location evaluates whether to keep or withdraw item

Lost Materials

Materials may get the status Lost when they are really long overdue, not necessarily lost. Many of these items will reappear at the end of the year. Take advantage of every opportunity you can to remind your patrons to look for these items.

Your patrons will sometimes tell you they've lost an item on their card. Before you do anything in LEAP, make sure they have searched everywhere for the item. Once they have checked everywhere, you can change the item status in LEAP to Lost, and tell your patron what the replacement cost will be.

You can check your shelves for Lost items regularly by using the Find tool to create a list of items with the circulation status of Lost. We will also send you reports that will tell you who checked out the lost item and how much the replacement cost is. You can use this report to create reminders to send home.

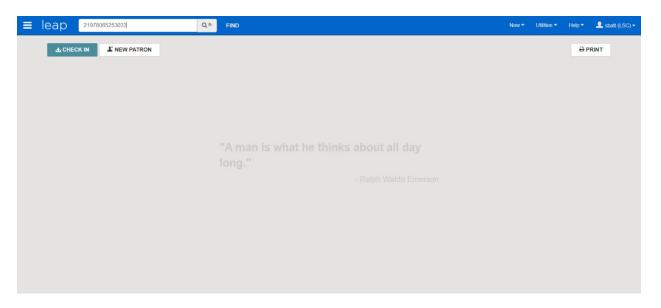
What to do with money from lost materials

The COVID years coincided with our change to the Polaris software which allows us to track charges, payments, and waived fees by owning location and by the location accepting payment or waiving fees. We have analyzed the first full school year's reports on lost and paid items. The overwhelming majority of books lost were lost at the owning location. Few books owned by other school locations were lost. We will continue to monitor these reports as the Shared System grows. For now, ALL lost book money should go into a library fund. You may spend it on a similar title or something more current or more in demand.

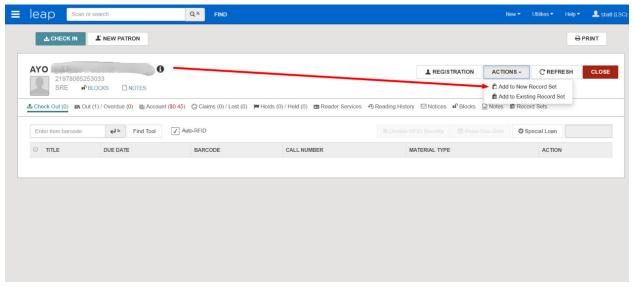
Patron Record Sets

Creating Record Sets

1. Scan the library card



2. Click on Actions, Add to New Record Set



3. Name the record set and Save it. (Note the patron you looked up is listed in the record set.) Name your record set using this EXACT convention:

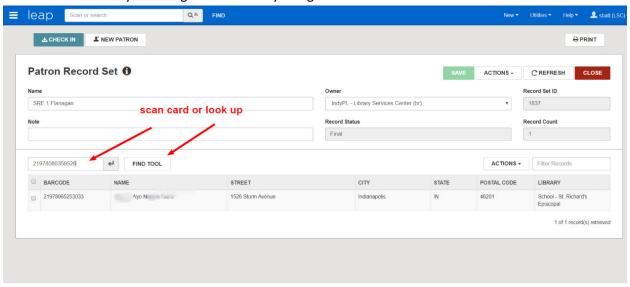
<u>School location code</u> space <u>Graduation year¹</u> space <u>Homeroom teacher's last name</u>

LTWR 2029 Gonzalez

¹ Graduation years for grades in 2023-24 are on the next page..

Change the owner of the patron record set to the name of your location.

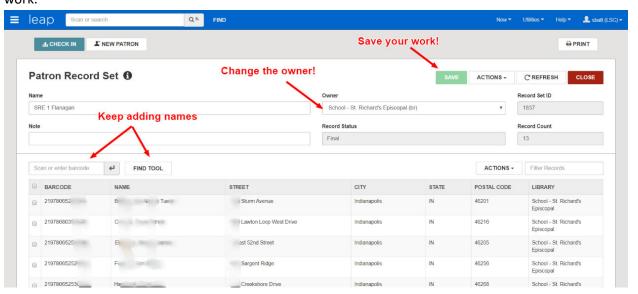
4. Add to the records by scanning barcodes or by using the Find Tool.



Graduation years for grades in 2024-25

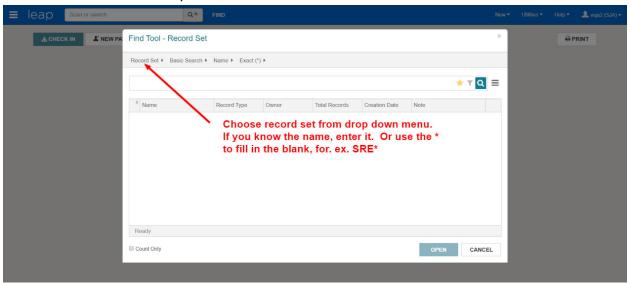
Current grade (2024-25)	Graduation Year
12	2025
11	2026
10	2027
9	2028
8	2029
7	2030
6	2031
5	2032
4	2033
3	2034
2	2035
1	2036
K	2037

5. When you finish adding names, make sure you remembered to change the owner and save your work.

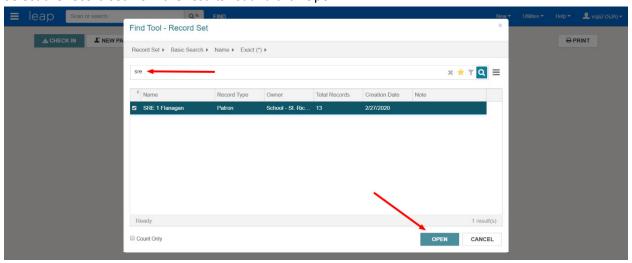


Finding Record Sets

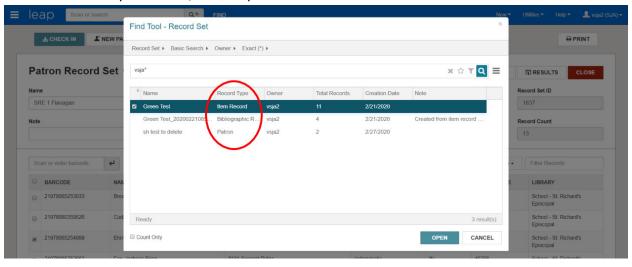
1. Use the Find Tool to look for your record sets.



2. Select the record set from the results list and click Open.

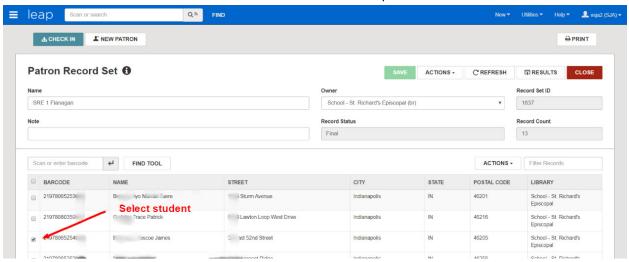


3. To find record sets you created, search by owner.

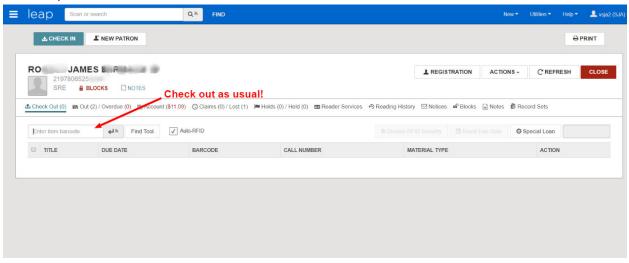


Using Record Sets

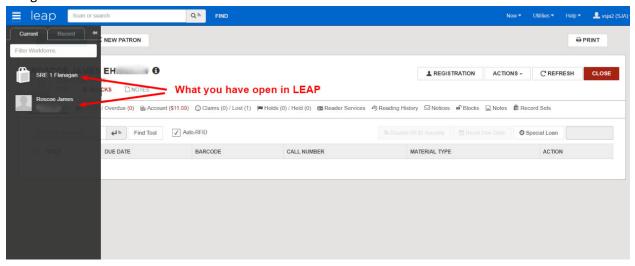
1. Select the student record in the record set and double click to open.



2. Do what you need to do! Check out, review overdues, etc.



3. Click on the hamburger menu to see what you have open. Leave the class set open to keep using it.



Classroom Record Sets

If you want to be able to pull up record sets by class for checking out, or if you want to be able to sort overdues by class, or find out how much seniors owe, then it is important to use the record set naming convention mentioned above (School location code space Graduation year space Homeroom teacher's last name, for example LTWR 2029 Gonzalez). It's also important to change the owner from your Polaris LEAP login to the name of your location.

Email the Shared System when the record sets for your location are complete.

We will pull up the record set and enter the information from your record set name in the graduation year/homeroom field in all patron records in the record set you created:

For example, 2029 Gonzalez

You will then be able to search for patrons (not record sets) by graduation year using the Find Tool, Patron (specify grad year/homeroom field):

2029*

You will be able to search by homeroom teacher name using the Find Tool, Patron (specify grad year/homeroom field):

*Gonzalez

Remember: You will also be able to search by record set name and leave the record set open in LEAP while you use it. Use the Find Tool and specify Record Set:

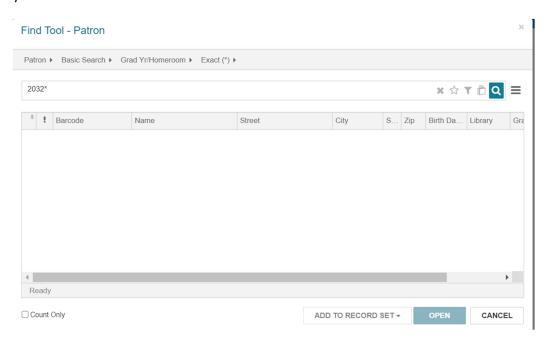
*LTWR 2029 Gonzalez

Creating Record Sets for the New Year Using Last Year's Record Set Information

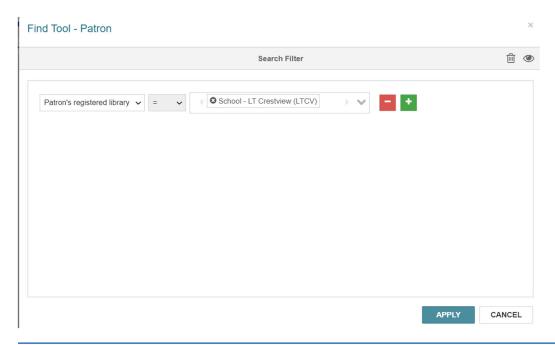
To create record sets for the New School Year, use the Find tool in Leap.

Find may have a different default search for you. If Patron isn't the first word in the string illustrated below click on whatever word it is to select Patron.

Search for <u>GradYr/Homeroom</u> for the youngest grade you served last year. **Be sure to put a *** after the year to include all teachers.

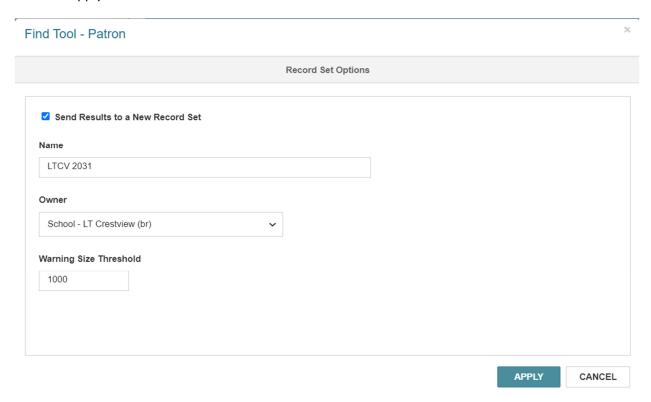


Next, filter your search (click on the funnel) to show results where your school is the <u>Patron's registered</u> library and click Apply.



DO NOT click the magnifying glass to bring up the results of your search!

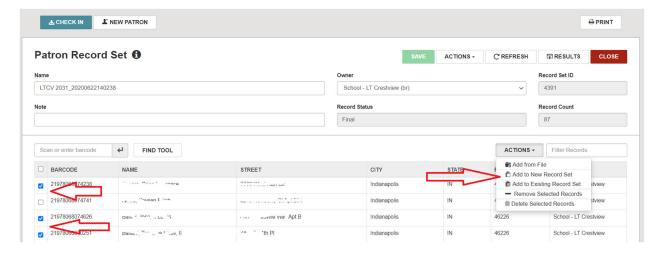
Instead, click the hamburger menu just to the right of the magnifying glass. Choose Record Set Options. Check the box to <u>Send Results to a New Record Set</u>. Use the naming convention of school code and grad year as in the example below. CHANGE the <u>Owner</u> to be your school, not your Polaris LEAP login name. Click the Apply button



NOW click the magnifying glass to perform the search and create the record set:



Click Yes to open it now



From here, look at your class roster and check the names of students enrolled in your first teacher's class. Then select <u>Add to New Record Set</u> and name your record set using the naming convention of School Code GradYr TeacherLastName (for ex., LTCV 2031 Hernandez).

Once you've added them to their new Grad Yr/Homeroom record set, choose Remove Selected Records. When you finish your class rosters, you may have a few names left in the set you created in the graduation year record set. Check to see whether you missed them as you were creating the homeroom sets. Otherwise, it's likely they moved to a different school. If you are in Lawrence Township, leave them as they are. If you are in another school, click on their record, open the Registration form and expire their library card so they no longer show as active at your school. Their new school or library branch will change the student's Registered Library when they renew the library card.

If you have students new to your school or who didn't get added to a record set at your school last year, use the Find Tool to look them up by name. They will appear at the top of your list. Take this opportunity now to open their record (just click on it) and change their Registered Library. When you Close the patron record, you will be back at the grad year Record Set and can add them to the grad year/homeroom record set you are working on.

Requesting Materials - Multiple Copies of the Same Title

- 1. Go to the patron record
- 2. Click on holds
- 3. Click on Multiple Holds (If you don't see multiple holds, then click on the MORE button)
- 4. Click on Add Titles button
- 5. Then you will need to change from a Bibliographic Search to an Item Record Search (Item Record—Basic Search—Title—Exact)
- 6. Search for title
- 7. Select copies by checking the box next to them (You probably will want to make sure that the item is in before checking the box also check the format)

- 8. Then click on the Open button which will take you back to the patron record.
- 9. Select the items by checking the box at the top of the list which will select the all the items.
- 10. Then click the Place Hold Button.
- 11. There will be a Pop Up that says you are placing multiple holds on the same item. Just click the Continue button until it stops popping up.
- 12. The holds will have a book symbol next to each item.

Requesting Materials - Holds on Multiple Titles for the Same Patron

- 1. Go to patron record
- 2. Click on holds
- 3. Click on Multiple Holds (If you don't see multiple holds, then click on the MORE button)
- 4. Click on Add Titles button
- 5. Search for items (Filter as necessary)
- 6. Select items by checking the box next to them
- 7. Then click on the Open button which will take you back to the patron record
- 8. Select the items by clicking the check box next to them
- 9. Then click the Place Hold Button.

(Special thanks to Katie Klopp, Juvenile Public Services Librarian at the Southport branch for crafting these instructions on January 24, 2020.)

Circulation questions and questions about borrower records

No matter how good our circulation training, you will have circulation questions! It might be simple (finding a book in the book return box without a barcode), or you might have a more complicated question involving material a student says he never checked out of the public library six years ago. You can also fill out the Shared System Help Request Form and we'll look for the best person to answer your question.

Questions about how to do things in Polaris (for ex., check in something as damaged)

These questions fall under the category of circulation. Fill out the **Shared System Help Request Form**

Questions about Earn and Learn

If your question is about how to handle an individual student's participation, it's likely that a circulation supervisor will have the best information. If your question is more general, or about the program as a whole, contact the Shared System office at sharedsystem@indypl.org.

Appendix A: Location Codes

IndyPL Shared System	ShSys
BG South Grove	BGSG
Brebeuf Jesuit Preparatory	BRE
Cardinal Ritter High	CRI
Cathedral High	CHS
Central Catholic	CCS
Christel House Academy South	CHAS
Christel House Academy West	CHAW
Covenant Christian High	COV
DT Decatur Central High	DHS
Heritage Christian Elementary	HCE
Heritage Christian High	HCS
Herron-Riverside High School	ICSRS
Holy Angels	HAS
Holy Cross Lutheran	HCL
Indiana School for the Deaf	ISD
IPS Arsenal Tech	IPARS
IPS Brookside Elementary #54	IP54
IPS Carl Wilde #79	IP79
IPS Center for Inquiry #70	IP70
IPS Charles W Fairbanks #105	IP105
IPS Clarence Farrington #61	IP61
IPS George Washington Carver	IP87
#87	
IPS Harshman MS	IPHAR
IPS James Russell Lowell #51	IP51
IPS Jonathan Jennings #109	IP109
IPS Meredith Nicholson #96	IP96
IPS Shortridge High	IPSH
IPS Sidener Academy	IPSID
IPS Theodore Potter #74	IP74
IPS Thomas Gregg Neighborhood	IPTG
School	
LT Amy Beverland	LTAB

LT Belzer Middle	LTBMS
LT Brook Park	LTBP
LT Crestview	LTCV
LT Fall Creek Valley Middle	LTFCV
LT Forest Glen	LTFG
LT Harrison Hill	LTHH
LT Indian Creek	LTIC
LT Lawrence Central High	LTLC
LT Lawrence North High	LTLN
LT Mary Castle	LTMEC
LT Oaklandon	LTOE
LT Skiles Test	LTST
LT Sunnyside	LTSS
LT Winding Ridge	LTWR
Nativity Catholic	NAT
Oaks Academy Brookside	OAKB
Oaks Academy Fall Creek	OAKF
Oaks Academy Middle School	OAKM
Our Lady of Lourdes	OLL
Shepherd Community Academy	SCA
St. Anthony's Catholic	SAC
St. Barnabas Catholic	SBC
St. Joan of Arc	SJA
St. Matthew	SMC
St. Philip Neri	SPN
St. Richard's Episcopal	SRE
Museum - Eiteljorg	EIT
Museum - Indiana Medical	IMHM
History Museum	
Museum - Newfields	IMA
(Indianapolis Museum of Art)	
Special - Jewish Community	JCL
Library	
Special - Riley Hospital	RHC

Appendix B: Creating a Scannable Barcode

Download the Codabar font from the internet. If you don't have administrative rights on your computer, you may need to ask your tech support staff for help. The font is free – just search for the words *free codabar font* in your browser and go from there. Once the font is downloaded, make sure you can see it in your list of available fonts. You will use the Codabar Large font.

Find the borrower in LEAP.

Put your cursor in the Barcode field and double click to highlight the whole number in blue.

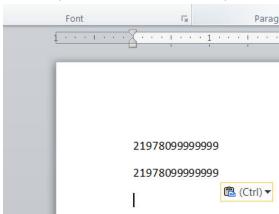
Copy the barcode number by using Ctrl-C or right click, Copy.

Close the borrower record.

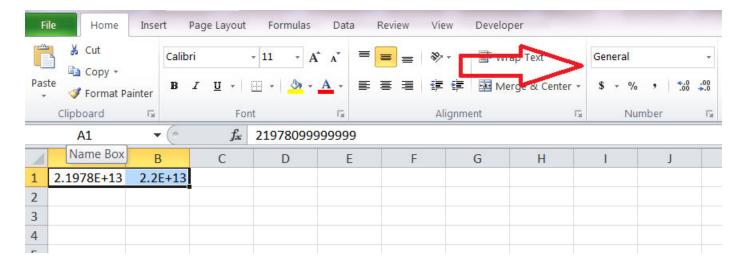
Open either Word or Excel. Use Word if you need to do this only once. Use Excel if you think you may need to do a longer list, or if you want to copy the information later into another spreadsheet.

Paste the barcode number by using Ctrl-V or right click, Paste.

• In Word, paste the barcode number, press enter and paste it again a second time.



In Excel, paste the barcode number, go to the next cell and paste it again a second time.



Excel doesn't know what to do with such a long number, so you have to tell it. Click on the box where it says General, choose Number, and then just below that box choose the "decrease digits after the decimal" icon and remove the two trailing zeros.

In either Word or Excel, insert your cursor in front of the second barcode number and type a capital A.



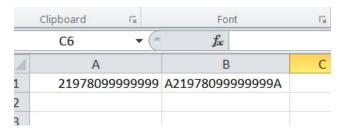
Now put your cursor at the end of the barcode number and type another capital A

It should look like this in Word:

21978099999999

A21978099999999A

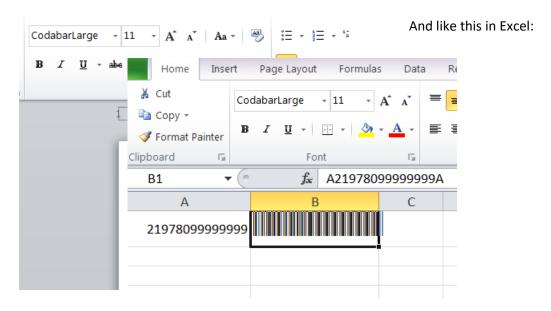
And like this in Excel:



Highlight the AbarcodeA.

Go to the ribbon menu where you can select a different font and select the Codabar font.

Your final product should look like this in Word



You can print out the barcode you just made and tape it over the barcode it is replacing. It will scan through Scotch tape! You will want to have both the barcode number and the scannable barcode for those students who want to know their barcode number!

Please do not use this for item barcodes. The sorter can't read them through the Scotch tape, so it's best just to have us replace them with a real barcode. Each location has barcodes you can use for replacements.

Making Multiple Barcodes Scannable

If you have a list of barcodes you need to scan for some reason, they still need to be "bookended" with capital As. At the far right of your worksheet, you will start three new columns. The first one will be named Scannable Barcode. Name the second one A, and the third one A2. Go ahead and put a capital A in the cells under those column headings.

	А	В	С	D
1	Barcode	Scannable Barcode	A1	A2
2	21978062854502	A21978062854502A	Α	Α
3				

Find the cell name containing the first barcode you want to make scannable. In the same row, under the column called Scannable barcode, type in this formula =concatenate(C2,A2,D2). The result is the barcode bookended by capital As because you just told Excel to squish some cells together in a particular order.

Just as with a single barcode, you'll highlight the cells to be made scannable and change the font to the Codabar font. You may have to adjust the column width or the font height to make it work. Experiment before printing more than one page!

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