

SECTION 6.0

Item Record Input Standards

* indicates a “Required” field

To create an item record from the Bib record:

Go to <Tools>, <Create item record> and you will get the following screen

To create an item record without opening a bib record first:

From the toolbar click <New>, Item Record and then pick the template you want to use. That will take you to the following screen

New Item Record Options

Item information

Title: Taken by storm. Find

Author: Hoag, Tami. Bib control: 490046

Call number

Scheme: Dewey Decimal Use template values instead of these (if available)

Prefix:

Class: Fiction Price:

Cutter:

Suffix:

Vol:

Copy:

Circ status: In-Process

Renewal limit: 0

Display in PAC Loanable outside system

Non-circulating Holdable

Item barcode(s)

Use system assigned barcodes

Distribution

Item total: 1 Barcode total: 0

Items	Branch	Collection	Shelf Location	Material Type	Loan Period	Fine Code	Stat Code	Owner	Template
1									(None)

OK Cancel Help

Some information will automatically be filled out for you depending on which method you used to create the item record. *These fields are automatically filled in if using an item template from either the main toolbar or from the template column dropdown list.

Item information: Click find and use the “Find Tool” to locate the bib record you would like to attach the item to. This information is automatically filled out if using a Bib record to create an item.

Item Barcode(s): Scan the item barcode into the box. You may scan multiple barcodes if creating multiple items for the Bib record.

Call Number: Enter the call number if not automatically filled out. The Dewey Call # goes under Class, the cutter # under Cutter and any volume information goes under Vol.

The Cataloging Committee (6/2/2010) agreed to accept the following recommendations for call number information in the Polaris item record:

Item Record Call Number Fields:

Scheme: Dewey Decimal [default].

Prefix: Enter information that you want to display before your call number; e.g., a unique shelving location like “LATEST AND BEST” or “Battle of the Books”.

Class: Enter the local Dewey call number only.

Cutter: Enter the Cutter Sanborn Four-Figure table cutter (up to 3 numbers) or letters that identify the item. A cutter can be an author’s last name. There may be more than one cutter in some situations; e.g. a Cutter Sanborn cutter for a biography plus the author’s last name.

Suffix: Enter information that you want to display after your call number; e.g., pbk.

Vol: Enter the local volume information (abbreviated caption with number/letter; year, etc.). The Volume information must be entered in a standard way so library users can place holds on multi-volume items. See the appendices on “Holdings Information” and “Punctuation Used in Holdings” for local practices.

Copy: Enter the copy number or other copy-specific information. Some jurisdictions use this field for other purposes; e.g., block numbers or overflow data that does not fit in another field. This field does not display in the OPAC.

See the following examples of call number information in item records:

Item Record 775997 - Cataloging - Polaris

File Edit View Links Tools Help

Barcode: Record status: ILL item Non-circulating Display in PAC

Title: **Bib control:**

Author: Parent: Item control:

Call no.: Price: Issue control:

Identification

Owner: Shelf location:

Assigned: Temp location:

Collection: **Circ status:**

Circulation parameters

Material type:

Loan period:

Fine code:

Renewal limit:

Stat code:

Name of piece:

Call number

Scheme:

Prefix:

Class:

Cutter:

Suffix:

Vol:

Copy:

Request

Loanable outside system

Holdable

Limit to:

Pickup at this branch

Patrons from this library and branches

Patrons from this branch only

Preferred borrowers

Issue:

For Help, press F1 NUM

Item Record 1363302 - Cataloging - Polaris

File Edit View Links Tools Help

Barcode: Record status: ILL item Non-circulating Display in PAC

Title: **Bib control:**

Author: Parent: Item control:

Call no.: Price: Issue control:

Identification

Owner: Shelf location:

Assigned: Temp location:

Collection: **Circ status:**

Circulation parameters

Material type:

Loan period:

Fine code:

Renewal limit:

Stat code:

Name of piece:

Call number

Scheme:

Prefix:

Class:

Cutter:

Suffix:

Vol:

Copy:

Request

Loanable outside system

Holdable

Limit to:

Pickup at this branch

Patrons from this library and branches

Patrons from this branch only

Preferred borrowers

Issue:

For Help, press F1 NUM

*Price: If price of the item is higher than the standard replacement price this field needs to be filled in.

*Circ Status: Automatically set to In-Process, but you may change it using the dropdown menu if necessary.

*Renewal limit: Enter the amount of times an item may be renewed.

*Check boxes: Display in PAC – if you want the record to show up in the OPAC
Non-circulating – if the item is library use only
Loanable outside system – if the item can be lent to non-Black Gold libraries
Holdable – if patrons and staff can place holds on the item.

Distribution: Select a template from the dropdown menu where it says (None). This will automatically fill in all of the columns for you. Be aware that these templates are created by the main cataloger for your library. If there is a template that you need, please contact them, not the Cataloging Unit, to get a new item template.

Once you are finished with the window, click <OK>. That will take you to the following screen.

The screenshot shows the 'Item Record 1391587 - Polaris' window. The title bar includes 'File Edit View Links Tools Help'. The main area contains several sections:

- Barcode:** [Empty field]
- Record status:** Final
- ILL item:**
- Non-circulating:**
- Display in PAC:**
- Title:** Taken by storm. [Find button]
- Bib control:** 490046
- Author:** Hoag, Tami. [Parent: [Empty field]]
- Item control:** 1391587
- Call no.:** [Empty field]
- Price:** \$40.00
- Issue control:** [Empty field]
- Identification:**
 - Owner:** Blanchard Community Library (br)
 - Assigned:** Blanchard Community Library (SP)
 - Collection:** Adult Non-Fiction (ANFIC)
 - Shelf location:** (None)
 - Temp location:** [Empty field]
 - Circ status:** In-Process
- Circulation parameters:**
 - Material type:** Adult Non-Fiction
 - Loan period:** 3 weeks
 - Fine code:** Adult Non-Fiction
 - Renewal limit:** 3
 - Stat code:** (None)
 - Name of piece:** [Empty field]
- Call number:**
 - Scheme:** Dewey Decimal
 - Prefix:** [Empty field]
 - Class:** [Empty field]
 - Cutter:** [Empty field]
 - Suffix:** [Empty field]
 - Vol:** [Empty field]
 - Copy:** [Empty field]
- Request:**
 - Loanable outside system
 - Holdable
 - Limit to:**
 - Pickup at this branch
 - Patrons from this library and branches
 - Patrons from this branch only
 - Preferred borrowers


The status bar at the bottom indicates: 'The record was saved successfully. SP Adult NonFic NUM'

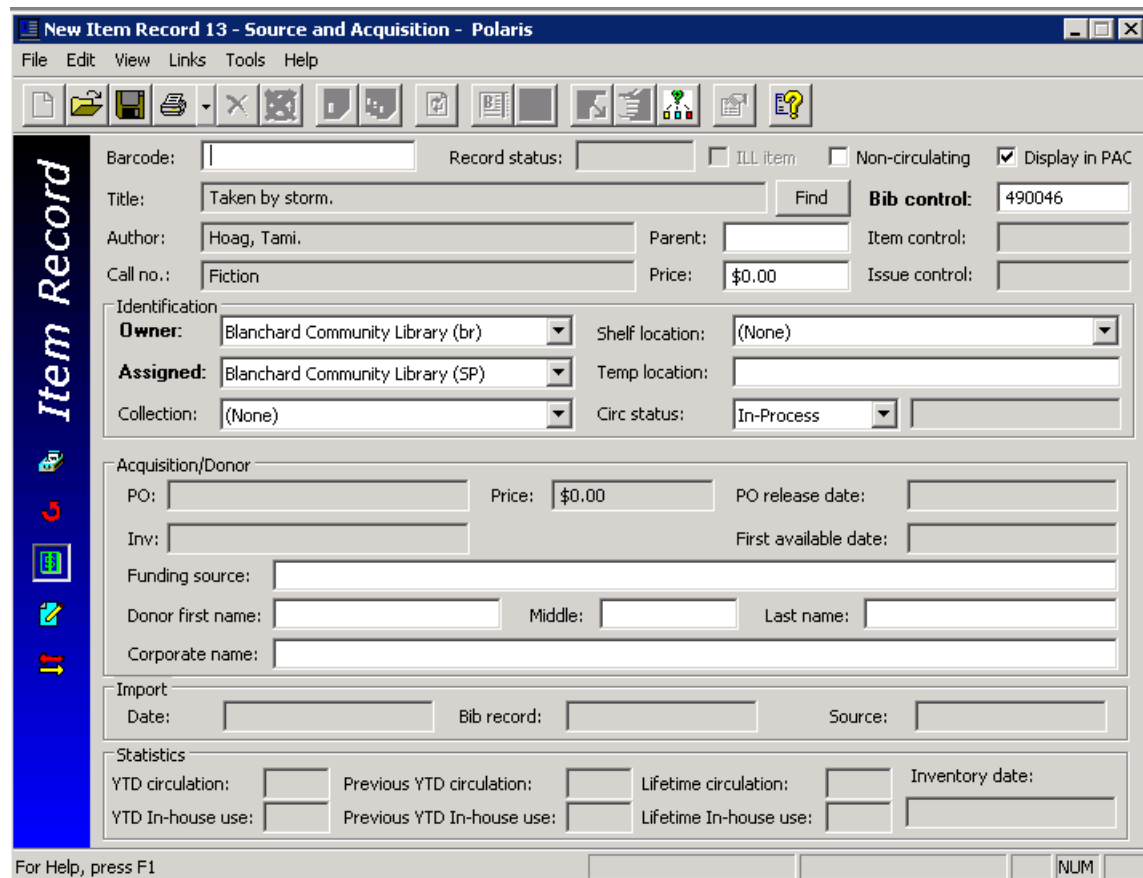
Most information should be filled out for you based on the input previous window.

Owner/Assigned/Home branches: The item record Owner/Assigned/Home branches should be the same unless a jurisdiction has floating collections, in which case the Assigned branches will be different (Cataloging Committee minutes, June 6, 2012).

If an item is nonfiction you will have to choose the stat code that corresponds to the item call number. Double check that all other information is correct and click Save. Once an item is saved an item control number will be show up in the upper right corner under the Bib control number.

If there are any questions on a field or button for this screen you may click the yellow question mark button to see a Polaris Help window that contains a complete description of each button and field.

To insert funding information click on the  to access the following window. You may enter the funding source, Donor name and or corporate name. All of this information is searchable under item records.



To access item specific notes click on the  button. This will give you the following window.

NOTES:

- Public note: Any information typed here will show up on the OPAC.
- Non-public note: This is item information for library staff only. You may enter contents or other in-house information here.
- Physical condition: This can be used to record noted stains and occurrence of mending issues.

BLOCKS:

- Library assigned: Do *not* use at this time as blocks interfere with self-checkout machines.
- Free text: You may enter contents information here if you want it to display in a pop-up window at check in or check out.

The ATS Operations Committee approved the use of Free text Block notes in Polaris at their July 7, 2010 meeting. Staff and patrons can still check out the item, including those who use the various self-check machines.

Example of item with Free text note:

The screenshot shows the 'Item Record' window in Polaris. The title bar reads 'Item Record 1491686 - Notes and Notices - Polaris'. The window contains various fields for item information:

- Barcode: 32113007634747
- Record status: Final
- Title: United States of Tara. The first season
- Author: (empty)
- Call no.: TELEVISION SHOWS
- Price: \$40.00
- Bib control: 528571
- Item control: 1491686
- Issue control: (empty)
- Owner: Santa Maria Library (br)
- Assigned: Santa Maria Library (MM)
- Collection: Popular Library (POPCOLL)
- Shelf location: DVD
- Temp location: (empty)
- Circ status: On Hold Shelf
- Notice Dates: Hold: 9/3/2010 9:52 AM
- Notes: Non-public note: DVD 7347
- Library assigned: (None)
- Free text: 2 Dvd set
- System: (empty)

At the bottom of the window, it says 'For Help, press F1' and there is a 'NUM' button.

Example of pop up window:

The screenshot shows a 'Item Blocks' pop-up window. It contains the following text:

Item is blocked

United States of Tara. The first season


Item block

2 Dvd set

Do you want to continue with this operation?

Buttons: Yes, No, Item Record

System: System generated only.

The  button will show you the item's history as shown below.

Item Record 1184253 - Circulation History - Polaris

File Edit View Links Tools Help

Barcode: Record status: ILL item Non-circulating Display in PAC

Title: **Bib control:**

Author: Parent: Item control:

Call no.: Price: Issue control:

Identification

Owner: Shelf location:

Assigned: Temp location:

Collection: Circ status:

Home branch: Do not float

History

Date	Assigned Branch	Status	Action	Location	User/WKS
9/22/2009 10:36:52 ...	Santa Maria Library	Out -> In	Item was checked in	Santa ...	Self Ch...
9/4/2009 10:57:25 AM	Santa Maria Library	In -> Out	Item was checked out	Santa ...	mmcirc...
8/31/2009 11:47:42 ...	Santa Maria Library	Out -> In	Item was checked in	Santa ...	Self Ch...
8/24/2009 11:21:48 ...	Santa Maria Library	In -> Out	Item was checked out	Santa ...	mmcirc...
8/20/2009 2:45:12 PM	Santa Maria Library	Out -> In	Item was checked in	Santa ...	Self Ch...
8/10/2009 2:41:44 PM	Santa Maria Library	In -> Out	Item was checked out	Santa ...	mmcirc...
7/23/2009 12:28:10 ...	Santa Maria Library	In-Transit -> In	Automatic status cha...	Santa ...	mmcirc...
7/21/2009 12:34:43 ...	Santa Maria Library	Out -> In-Transit	To Santa Maria Librar...	Orcutt ...	mmcirc2...
7/16/2009 4:03:10 PM	Santa Maria Library	In -> Out	Item was checked out	Santa ...	Self Ch...

For Help, press F1