# Polaris and Interlibrary Loans (ILLS)



### **Polaris ILLS**

Polaris manages your library collection <u>and</u> the collections of all the other TRAC libraries together in one large database.

Your patrons and patrons throughout TRAC place holds, or requests, on all these holdings.

Everyday library material is on the move to satisfy TRAC patrons, and other patrons in Alberta!

Sending and receiving Interlibrary Loans (ILLS) is an important part of your daily work: Patrons are not only at your desk, but also on your computer "desktop"!

### **Polaris ILLS & the Request Manager**

Hold requests are managed through a Polaris report called the Request Manager.

This should be opened daily, the items gathered from your collection, "Checked In", and put on your local holds shelf, or sent to the requesting library.

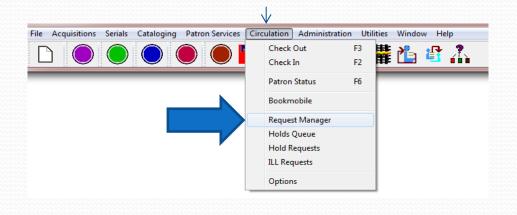
Please watch the training PowerPoint called "Shipping ILLs" on the PLS website.

# **Polaris ILLS & the Request Manager**



On the Polaris toolbar click on the burgundy button to open the circulation view. The Request Manager icon is a hand selecting a book from a shelf:

Or choose "Request Manager" from the Circulation drop down list.



Branch nam	e: Worsley	and District Libr	ary Society (AV	/D)	•	By: Item 🔻	• Status:	Pending	•	
Requests										
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Collection	Shelf L	Call Number	Author	Title	Format	Patron Name	Pickup B	Barcode	Pending Date	
E	Children	E BER c.1	Berenstain,	The Berenstain	Book	Dubreuil, Be	ASLM	32407000042654	09/11/2016	
E	Children	EF Y KEA c.1	Keats, Ezra	Goggles!	Book	Johnson, Lisa	AOM	32407000010370	08/11/2016	
E	Children	EL FIC HU	Hundal, N	I heard my moth	Book	Mayer, Beck	AGP	31407000009456	08/11/2016	E
E	Children	EL FIC KE	Keats, Ezra	Whistle for Willie	Book	Johnson, Lisa	AOM	31407000008359	08/11/2016	
I NF	Reference	796.323 FI		F.I.B.A. handbo	Book	Bylsma, Esther	ASLM	31407000054403	09/11/2016	
NF	Reference	940.542 B	Brook, Henry.	True stories of	Book	Drumheller P	ADRM	31407000131128	05/11/2016	
II TR	Teache	796 BAK c.1	Baker, Doug.	The coaches book.	Book	Bylsma, Esther	ASLM	31407000044735	09/11/2016	
TR	Teache	TR 394.2	Gagné, De	Slapshot Santa s	Book	Ratzlaff, Diana	AIRC	31407000128322	08/11/2016	Ŧ
Held items to	transfer:									
Collection	Shelf L	Call Number	Author	Title	Format	Patron Name	New Pick	. Barcode	Held Date	

The request manager opens by default to your branch.

Focus on the top window (Requests), noting that the total number of items is not visible in the window (evidenced by the scroll bar on the right). The total number of requests (8) shows in the center , at the bottom of the workform.

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<i>jer</i>	Branch name:	Worsley a	and District Libra	ary Society (AW	/D)	▼ By:	Item	• Status:	Pending	•	
Manager	Requests							+ <b>(</b> ), <b>(</b> ),		-al	
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	Collection	Shelf L	Call Number	Author	Title	Format	Patron Name	Pickup B	Barcode	Pending Date	-
	Collection		Call Number E BER c. 1		Title The Berenstain	Format Book		Pickup B			
		Children	E BER c.1		The Berenstain		Patron Name	Pickup B	Barcode	Pending Date	^
	E	Children Children	E BER c.1 EF Y KEA c.1	Berenstain, Keats, Ezra	The Berenstain	Book Book	Patron Name Dubreuil, Be	Pickup B ASLM AOM	Barcode 32407000042654	Pending Date 09/11/2016	
	E	Children Children Children	E BER c. 1 EF Y KEA c. 1 EL FIC HU	Berenstain, Keats, Ezra Hundal, N	The Berenstain Goggles!	Book Book	Patron Name Dubreuil, Be Johnson, Lisa	Pickup B ASLM AOM	Barcode 32407000042654 32407000010370	Pending Date 09/11/2016 08/11/2016	•
	E E E	Children Children Children Children	E BER c. 1 EF Y KEA c. 1 EL FIC HU	Berenstain, Keats, Ezra Hundal, N	The Berenstain Goggles! I heard my moth	Book Book Book	Patron Name Dubreuil, Be Johnson, Lisa Mayer, Beck	Pickup B ASLM AOM AGP AOM	Barcode 32407000042654 32407000010370 31407000009456	Pending Date 09/11/2016 08/11/2016 08/11/2016	
Request Ma	E E E E	Children Children Children Children Reference	E BER c. 1 EF Y KEA c. 1 EL FIC HU EL FIC KE 796.323 FI	Berenstain, Keats, Ezra Hundal, N Keats, Ezra	The Berenstain Goggles! I heard my moth Whistle for Willie	Book Book Book Book	Patron Name Dubreuil, Be Johnson, Lisa Mayer, Beck Johnson, Lisa	Pickup B ASLM AOM AGP AOM ASLM	Barcode 32407000042654 32407000010370 31407000009456 31407000008359	Pending Date 09/11/2016 08/11/2016 08/11/2016 08/11/2016	
	E E E E MF	Children Children Children Children Reference Reference	E BER c. 1 EF Y KEA c. 1 EL FIC HU EL FIC KE 796.323 FI	Berenstain, Keats, Ezra Hundal, N Keats, Ezra Brook, Henry.	The Berenstain Goggles! I heard my moth Whistle for Willie F.I.B.A. handbo	Book Book Book Book Book Book	Patron Name Dubreuil, Be Johnson, Lisa Mayer, Beck Johnson, Lisa Bylsma, Esther	Pickup B ASLM AOM AGP AOM ASLM ADRM	Barcode 32407000042654 32407000010370 3140700009456 3140700008359 31407000054403	Pending Date 09/11/2016 08/11/2016 08/11/2016 08/11/2016 09/11/2016	

The request manager opens by default already sorted by collection code. (The first column in the report)

The list can be sorted by any of the column headings by clicking on the column headings. If the collection code reflects how materials are organized and shelved in your library it is not necessary to re-sort the report.

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er	Branch name	: Worsley a	and District Libra	ary Society (AW	VD)	▼ Ву	: Item	<ul> <li>Status:</li> </ul>	Pending		•	
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	lection	Shelf L	Call Number	Author	Title	Format	Patron Name	世 単 Pickup B	Barcod	05:	Pending Date	-
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		Children		Berenstain,	The Berenstain		Patron Name	Pickup B	Barcod		Pending Date	_
uest	E	Children Children	E BER c.1 EF Y KEA c.1	Berenstain, Keats, Ezra	The Berenstain	Book	Patron Name Dubreuil, Be	Pickup B ASLM AOM	Barcod 32407 32407	42654	Pending Date 09/11/2016	
uest	E	Children Children Children	E BER c. 1 EF Y KEA c. 1 EL FIC HU	Berenstain, Keats, Ezra Hundal, N	The Berenstain Goggles!	Book Book	Patron Name Dubreuil, Be Johnson, Lisa	Pickup B ASLM AOM	Barcod 32407 32407	42654 10370 99456	Pending Date 09/11/2016 08/11/2016	
uest	E	Children Children Children	E BER c. 1 EF Y KEA c. 1 EL FIC HU	Berenstain, Keats, Ezra Hundal, N	The Berenstain Goggles! I heard my moth	Book Book Book Book	Patron Name Dubreuil, Be Johnson, Lisa Mayer, Beck	Pickup B ASLM AOM AGP AOM	Barcod 32407 32407 31407	42654 10370 29456 008359	Pending Date 09/11/2016 08/11/2016 08/11/2016	
kequest Manager	E	Children Children Children Children Reference	E BER c.1 EF Y KEA c.1 EL FIC HU EL FIC KE	Berenstain, Keats, Ezra Hundal, N Keats, Ezra	The Berenstain Goggles! I heard my moth Whistle for Willie	Book Book Book Book	Patron Name Dubreuil, Be Johnson, Lisa Mayer, Beck Johnson, Lisa	Pickup B ASLM AOM AGP AOM ASLM	Barcod 32407 32407 31407 314070	42654 10370 09456 008359 054403	Pending Date 09/11/2016 08/11/2016 08/11/2016 08/11/2016	
	E E E NF	Children Children Children Children Reference Reference	E BER c. 1 EF Y KEA c. 1 EL FIC HU EL FIC KE 796.323 FI	Berenstain, Keats, Ezra Hundal, N Keats, Ezra Brook, Henry.	The Berenstain Goggles! I heard my moth Whistle for Willie F.I.B.A. handbo	Book Book Book Book Book Book	Patron Name Dubreuil, Be Johnson, Lisa Mayer, Beck Johnson, Lisa Bylsma, Esther	Pickup B ASLM AOM AGP AOM ASLM ADRM	Barcod 32407 32407 31407 31407000	42654 10370 99456 008359 054403 131128	Pending Date 09/11/2016 08/11/2016 08/11/2016 08/11/2016 09/11/2016	

Note the "Item Record" icons to the left of the 5<sup>th</sup> and 7<sup>th</sup> items. This indicates that only these barcodes can satisfy this request. Even if you have multiple copies of "The coaches book", for example, only the item with the listed barcode will do. Item specific hold requests like these may result because your library has the only holding in all of TRAC or because the hold has been placed directly on the item.

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	9		E				Keats, Ezra			Book	Johnson, Lisa		32407000010370	08/11/2016	
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	Q		NF	Refer	ence 940	).542 B	Brook, Henry.	True stories of	F	Book	Drumheller P	ADRM	31407000131128	05/11/2016	
		a 11	II TR	Teach	ie 796	6 BAK c. 1	Baker, Doug.	The coaches be	ook.	Book	Bylsma, Esther	ASLM	31407000044735	09/11/2016	
	2		TR	Teach	ie TR	394.2	Gagné, De	Slapshot Santa	a s	Book	Ratzlaff, Diana	AIRC	31407000128322	08/11/2016	-

On the File -> Print drop down menu, select "Holds to Fill" to print this 8 item list as a 2 page report. The first item will appear as formatted below:

E E BER c.1	Book Children's Area 3240	7000042654	
The Berenstain Bea	ars and the Nutcracker		Berenstain, Jan, 1923-2012
Dubreuil, Benjamin	Family	ASLM	20135000253020
780-805-1895	Pickup L	ibrary: ASLM	

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St		Е	Children	E BER c.1	Berenstain,	The Berenstain .	Book	Dubreuil, Be	ASLM	32407000042654	09/11/2016	
Ū و		E	Children	EF Y KEA c.1	Keats, Ezra	Goggles!	Book	Johnson, Lisa	AOM	32407000010370	08/11/2016	
 -			Childron		Husdal M	T board my moth	Pool	Mayor Book	ACD	21/0700000/EC	00/11/2016	

#### On the File -> Print drop down, select "List view" to print this 8 item list as a 1 page report formatted as below.

Collection	Shelf Location	Call Number	Author	Title	Format		Pickup Branch	Barcode	Pending Date
E	Children's Area	E BER c.1	Berenstain, Jan, 1923- 2012	The Berenstain Bears and the Nutcracker	Book	Dubreuil, Benjamin	ASLM	32407000042654	09/11/2016
Е	Children's Area	EF Y KEA c.1	Keats, Ezra Jack	Goggles!	Book	Johnson, Lisa	AOM	32407000010370	08/11/2016
E	Children's Area	EL FIC HUN WCS c.1	Hundal, Nancy, 1957-	I heard my mother call my name	Book	Mayer, Becky Lynn	AGP	31407000009456	08/11/2016
Е	Children's Area	EL FIC KEA WCS c.1	Keats, Ezra Jack	Whistle for Willie	Book	Johnson, Lisa	AOM	3140700008359	08/11/2015
<b>≦</b> NF	Reference	796.323 FIB c.1		F.I.B.A. handbook : rules, cases, mechanics	Book	Bylsma, Esther	ASLM	31407000054403	09/11/2016
NF	Reference	940.542 BRO c.1	Brook, Henry.	True stories of D- Day	Book	Drumheller PLibrary Display, Drumheller	ADRM	31407000131128	05/11/2016
<b>∐</b> TR	Teacher Resource	796 BAK c.1	Baker, Doug.	The coaches book.	Book	Bylsma, Esther	ASLM	31407000044735	09/11/2016
TR	Teacher Resource	TR 394.2 GAG c.1	Gagné, Denise, 1956-	Slapshot Santa scores again : a musical play for Elementary schools	Book	Ratzlaff, Diana	AIRC	31407000128322	08/11/2015

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	est		Е	Childre	en E BER c.1	Berenstain,	The Berenstair	n	Book	Dubreuil, Be	ASLM	32407000042654	09/11/2016	
	Ð		E	Childre	en EF Y KEA c.1	Keats, Ezra	Goggles!		Book	Johnson, Lisa	AOM	32407000010370	08/11/2016	
			F	Childre		Hundal, N	I board my mo	th	Rook	Mayor Rock	ACD	2140700000455	09/11/2016	

# **Best practice** is to quickly stretch narrow columns and hide unnecessary columns, then print a one page "Current View".

Request	Manager - Hold	Requests			
Branch na	me: Worsley and Dis	strict Library Society (AWI	D)	By: Item Status: Pending	
Requests					
Collectio	- Chalf Lagation		Author	Table	Parendo
	n Shelf Location	Call Number	Author	Title	Barcode
Collectio	Children's Area	E BER c.1	Berenstain, Jan, 1923-2012	The Berenstain Bears and the Nutcracker	32407000042654
E E	Children's Area Children's Area	E BER c.1 EF Y KEA c.1	Berenstain, Jan, 1923-2012 Keats, Ezra Jack	The Berenstain Bears and the Nutcracker Goggles!	32407000042654 32407000010370
E E E	Children's Area Children's Area Children's Area	E BER c.1 EF Y KEA c.1 EL FIC HUN WCS c.1	Berenstain, Jan, 1923-2012 Keats, Ezra Jack Hundal, Nancy, 1957-	The Berenstain Bears and the Nutcracker Goggles! I heard my mother call my name	32407000042654 32407000010370 31407000009456
E E E	Children's Area Children's Area Children's Area Children's Area	E BER c.1 EF Y KEA c.1 EL FIC HUN WCS c.1 EL FIC KEA WCS c.1	Berenstain, Jan, 1923-2012 Keats, Ezra Jack	The Berenstain Bears and the Nutcracker Goggles! I heard my mother call my name Whistle for Willie	32407000042654 32407000010370 31407000009456 31407000008359
E E E	Children's Area Children's Area Children's Area	E BER c.1 EF Y KEA c.1 EL FIC HUN WCS c.1	Berenstain, Jan, 1923-2012 Keats, Ezra Jack Hundal, Nancy, 1957-	The Berenstain Bears and the Nutcracker Goggles! I heard my mother call my name	32407000042654 32407000010370 31407000009456
E E E	Children's Area Children's Area Children's Area Children's Area	E BER c.1 EF Y KEA c.1 EL FIC HUN WCS c.1 EL FIC KEA WCS c.1	Berenstain, Jan, 1923-2012 Keats, Ezra Jack Hundal, Nancy, 1957-	The Berenstain Bears and the Nutcracker Goggles! I heard my mother call my name Whistle for Willie	32407000042654 32407000010370 31407000009456 31407000008359
E E E E MF	Children's Area Children's Area Children's Area Children's Area Reference	E BER c.1 EF Y KEA c.1 EL FIC HUN WCS c.1 EL FIC KEA WCS c.1 796.323 FIB c.1 940.542 BRO c.1	Berenstain, Jan, 1923-2012 Keats, Ezra Jack Hundal, Nancy, 1957- Keats, Ezra Jack	The Berenstain Bears and the Nutcracker Goggles! I heard my mother call my name Whistle for Willie F.I.B.A. handbook : rules, cases, mechanics	32407000042654 32407000010370 3140700009456 3140700008359 31407000054403

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	Collection	Shelf Lo	Call Number	Author	Title	Format	Patron Name	Pickup Bra	Barcode	Pending Date	
	E	Children'	E BER c. 1	Berenstain,	The Berenstain Bea	. Book	Dubreuil, Benj	ASLM	32407000042654	09/11/2016	

Hover over any column heading to see the column edges. Hovering over the right edge and double clicking will adjust the width to the maximum width required to view the column's longest item. Hover over a columns' right edge and drag the cross hairs left or right to erase or expand the column width.

Hover over the column right edge until a cross bar is visible:

Double click on the right edge to auto adjust width.

Drag the crossbar to change any column width.

Hide 'Pending Date', 'Pickup Branch', 'Patron Name', and 'Format' columns. Stretch the others for an easy to read, concise report for retrieving items from your stacks.

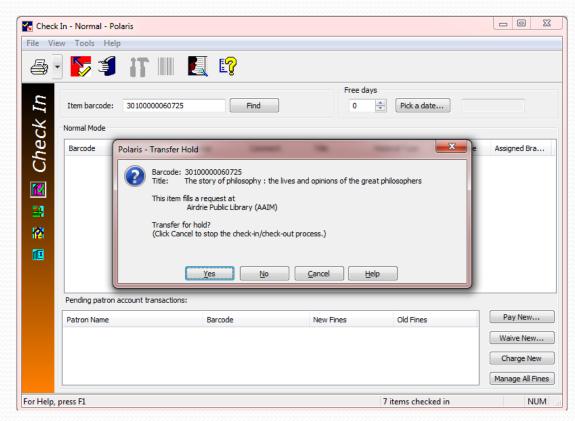
Close the Request Manager and re-open at any time to restore defaults.

Reques	st Manager - Hold	Requests			
Branch	name: Worsley and Dis	strict Library Society (AW	D)	By: Item Status: Pending	
Requests					
C-11-1					
Collect	tion Shelf Location	Call Number	Author	Title	Barcode
E	Children's Area	Call Number E BER c.1		Title The Berenstain Bears and the Nutcracker	Barcode 32407000042654
			Author Berenstain, Jan, 1923-2012 Keats, Ezra Jack		
E	Children's Area	E BER c.1	Berenstain, Jan, 1923-2012	The Berenstain Bears and the Nutcracker	32407000042654
E E	Children's Area Children's Area	E BER c.1 EF Y KEA c.1	Berenstain, Jan, 1923-2012 Keats, Ezra Jack	The Berenstain Bears and the Nutcracker Goggles!	32407000042654 32407000010370
E E E	Children's Area Children's Area Children's Area	E BER c.1 EF Y KEA c.1 EL FIC HUN WCS c.1	Berenstain, Jan, 1923-2012 Keats, Ezra Jack Hundal, Nancy, 1957-	The Berenstain Bears and the Nutcracker Goggles! I heard my mother call my name	32407000042654 32407000010370 31407000009456
E E E	Children's Area Children's Area Children's Area Children's Area	E BER c.1 EF Y KEA c.1 EL FIC HUN WCS c.1 EL FIC KEA WCS c.1	Berenstain, Jan, 1923-2012 Keats, Ezra Jack Hundal, Nancy, 1957-	The Berenstain Bears and the Nutcracker Goggles! I heard my mother call my name Whistle for Willie	32407000042654 32407000010370 31407000009456 31407000008359
E E E ≌NF	Children's Area Children's Area Children's Area Children's Area Reference	E BER c.1 EF Y KEA c.1 EL FIC HUN WCS c.1 EL FIC KEA WCS c.1 796.323 FIB c.1 940.542 BRO c.1	Berenstain, Jan, 1923-2012 Keats, Ezra Jack Hundal, Nancy, 1957- Keats, Ezra Jack	The Berenstain Bears and the Nutcracker Goggles! I heard my mother call my name Whistle for Willie F.I.B.A. handbook : rules, cases, mechanics	32407000042654 32407000010370 31407000009456 31407000008359 31407000054403

**Best practice** is to stretch narrow columns and hide unnecessary columns, then print a one page, "Current View" report.

Use the "Check in" workform and scan each barcode. A pop up window will ask you if you wish to transfer the item to fill the request. Press enter, or click on "Yes", and send the item to the destination indicated.

If you have a receipt printer, an In-Transit receipt will print for you.



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In this example, see how the Circulation Status changed from "In" to "Transferred". When Airdrie Library receives and checks in the item the status will change to "Being Held". When their requesting patron picks up the hold, the status will change to "Out". When the patron returns the item, the status will change to "In Transit". When you receive and check in the item, the status will change to "Shelving Cart" (In).

Please use the "Shipping ILLs" training PowerPoint to learn more about packaging, addressing and shipping library material.

For any Hold Request questions you have, please call Peace Library System 1-800-422-6875 toll free or 780-538-4656