

## Polaris Tips: Using Record Sets

If you ever need to work with a group of Polaris records – for example, if you’re weeding and need to withdraw numerous items, or if you need to keep track of which materials are in a temporary display – record sets are your friend. Here are a few tips about how to make the most of this Polaris feature.



You can create a record set whenever you have a list of records on the screen. So, if you run a search and want to save the results, just highlight all of the records, right click, and choose Add To Record Set – New. You can also add to an existing record set.

**Record Set 40147 - Polaris**

File Edit View Tools Help

Name: sample item record set\_20180627154901 Owner: wtaylor Record type: Item

Note: Created from bib record set "change to yes 6-22" Number of records: 16

Title	Assigned...	Collection	Materia...	Shelf ...	Call Nu...	Volu...	Status	Barcode	Last Activity Date	R...
Agatha Christie Miss Marple movie coll...	WMRL Al...	Deposit...	DVD - 3...		DVD		Chec...	32395007107325	6/10/2010	Fi...
Agatha Christie Miss Marple movie coll...	Bookmobile	DVD - N...	DVD - 7...		DVD		Avail...	32395006719203	7/30/2014	Fi...
Agatha Christie Miss Marple movie coll...	Hagerst...	DVD - N...	DVD - 7...		DVD TVM		Avail...	32395010516801	11/17/2017	Fi...
Ape adventures	Hagerst...	Juv - E...					Avail...	32395030069138	6/21/2018	Fi...
The complete idiot's guide to gluten-fr...	Hagerst...	Adult n...					Avail...	32395008099315	6/21/2018	Fi...
Creepy-crawly critters	Hagerst...	Juv - E...					Avail...	32395009386034	6/21/2018	Fi...
Executive orders	Oakland ...	Adult fi...					With...	32214010302353	2/15/2012	D...
Executive orders	Williamsp...	Adult fi...					With...	32395006514075	7/9/2014	Fi...
Executive orders	Accident...	Adult fi...					Avail...	32214011421376	6/21/2018	Fi...
A match made in Texas	Accident...	Large P...						02	6/21/2018	Fi...
Menfreya in the morning	Oakland ...	Adult fi...						61	6/20/2018	Fi...
Mystic Music presents mellow gold	Grantsvil...	Music (...)						90	6/21/2018	Fi...
Queen's gambit : [a novel]	Hagerst...	Adult fi...					Chec...	32395010281208	6/20/2018	Fi...
The sunflower : on the possibilities an...	Smithsburg	Adult n...					Avail...	32395004745002	6/25/2018	Fi...
The vampire bunny	Hagerst...	Juv - E...					Avail...	32395007493261	6/21/2018	Fi...
Venn diagrams.	Hagerst...	Juv - N...					Chec...	32395002374722	6/20/2018	Fi...

16 of 16 record(s) retrieved

You can control who sees your record set, depending on who you make the “owner” of the set. If the owner is a library system or a branch, only staff members from that organization will be able to see and work with the set. If you, individually, are the record set owner, then only you will see it. To be sure than anyone can see it and work with it, make the owner “Western Maryland Library Partnership” – that’s the group for the combined organizations: WMRL, Ruth Enlow, and WCFL.

**Item Record Set**

Name: sample item record set\_20180627154901    Owner: wtaylor    Record type: Item

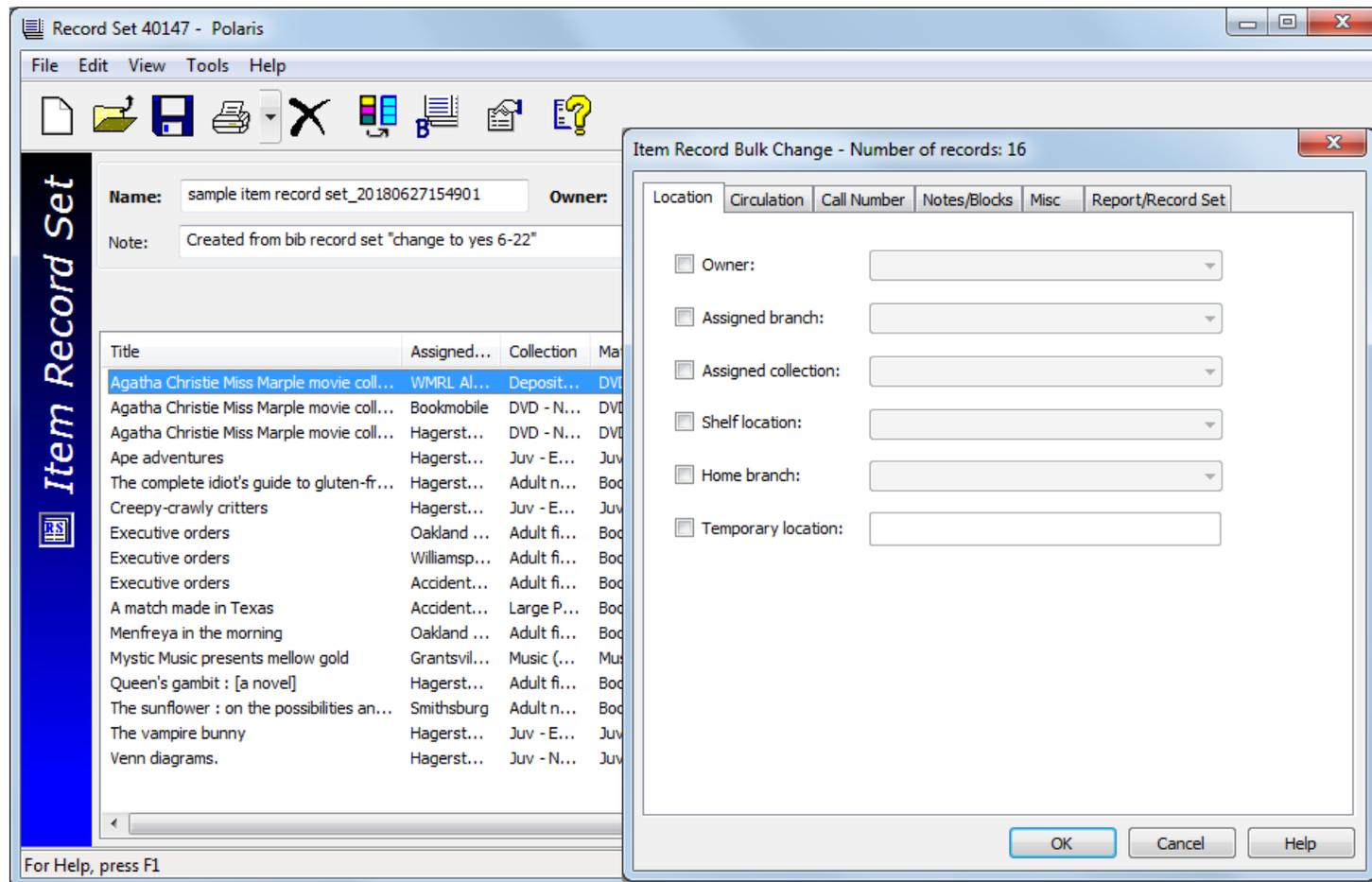
Note: Created from bib record set "change to yes 6-22"

of records: 16

Title	Assigned...	Collection	Ma		Last Activity Date
Agatha Christie Miss Marple movie coll...	WMRL Al...	Deposit...	DVD	107325	6/10/2010
Agatha Christie Miss Marple movie coll...	Bookmobile	DVD - N...	DVD	719203	7/30/2014
Agatha Christie Miss Marple movie coll...	Hagerst...	DVD - N...	DVD	516801	11/17/2017
Ape adventures	Hagerst...	Juv - E...	Juv	069138	6/21/2018
The complete idiot's guide to gluten-fr...	Hagerst...	Adult n...	Boc	099315	6/21/2018
Creepy-crawly critters	Hagerst...	Juv - E...	Juv	886034	6/21/2018
Executive orders	Oakland ...	Adult fi...	Boc	302353	2/15/2012
Executive orders	Williamsp...	Adult fi...	Boc	514075	7/9/2014
Executive orders	Accident...	Adult fi...	Boc	421376	6/21/2018
A match made in Texas	Accident...	Large P...	Boc	328502	6/21/2018
Menfrefya in the morning	Oakland ...	Adult fi...	Boc	020161	6/20/2018
Mystic Music presents mellow gold	Grantsvil...	Music (...)	Mu	123790	6/21/2018

Once a record set is saved, you can make “bulk changes” – that is, modify all the records in the set at once.

Click Tools / Bulk Change. On the bulk change form, click the box next to any field you want to modify, then specify what it should be, then click OK.



If you have a set of bib records, you can create a new set containing all the item records that are attached to those bib records. And vice versa – you can create a set of bib records from a set of item records. This function is under “Tools.”

The image shows two overlapping windows from the Polaris library management system. The top window, titled 'Record Set 40024 - Polaris', is a 'Bibliographic Record Set'. Its 'Tools' menu is open, showing options like 'Add...', 'Remove', 'Add all records to...', 'Add selected records to...', 'Bulk Change', 'Create Item Record Set' (highlighted), 'Create Authority Record Set', and 'Delete Selected Records'. The 'Create Item Record Set' option has a keyboard shortcut of 'Ctrl+T'. The main area of this window shows a list of records with columns for Title, Format, Link, Holds, Publi..., Call Number, Control N..., and Status. A vertical blue bar on the left side of this window is labeled 'Bibliographic Record Set'.

The bottom window, titled 'Record Set 40147 - Polaris', is an 'Item Record Set'. It shows a dialog for creating a new item record set. The 'Name' field contains 'sample item record set\_20180627154901', the 'Owner' is 'wtaylor', and the 'Record type' is 'Item'. The 'Note' field contains 'Created from bib record set \*change to yes 6-22\*'. The 'Number of records' is set to 16. Below the dialog is a table of item records with columns: Title, Assigned..., Collection, Materia..., Shelf..., Call Nu..., Volu..., Status, Barcode, Last Activity Date, and R... The table lists various items, including Agatha Christie Miss Marple movie collections, Ape adventures, The complete idiot's guide to gluten-free eating, Creepy-crawly critters, Executive orders, A match made in Texas, Menfreya in the morning, Mystic Music presents mellow gold, Queen's gambit, The sunflower, The vampire bunny, and Venn diagrams. A vertical blue bar on the left side of this window is labeled 'Item Record Set'. At the bottom of the window, it says 'For Help, press F1' and '16 of 16 record(s) retrieved'.

You can create a record set of patron records also – for example, if you want to modify all the patron records of a family at once.

Just do a search, highlight the records you want, and right click. Choose Add To Record Set / New. Once the set is saved, you can make bulk changes.

Barcode	Name	Street	City	State	Zip	Birth Date	Library
22395002803789	Test, Adult address check expired	1111 north st	HAGERSTOWN	MD	21740	6/30/2015	Hagerstown
22395002528295	Test, Adult blocking note	1000 tandy dr	HAGERSTOWN	MD	21740	5/25/1965	Hagerstown
22395002917365	Test, Adult fines block	007 Mockingbird Lane	HAGERSTOWN	MD	21740	10/1/1980	Hagerstown
22395002528287	test, adult good	1000 tandy	HAGERSTOWN	MD	21740	5/25/1954	Hagerstown
22395001952132	Test, Adult no blocks	100 S. Potomac St.	HAGERSTOWN	MD	21740	9/23/1950	Hagerstown
22395002472064	Test, Card S.	100 S. POTOMAC ST	CLEAR SPRING	MD	21722	1/2/2001	Hagerstown
22395002528303	test, good ya		HAGERSTOWN	MD	21740	1/25/2003	Hagerstown
22395002528329	Test, Juv expired		HAGERSTOWN	MD	21740	1/25/1996	Hagerstown
22395002494001	Test, Juv fines block		HAGERSTOWN	MD	21740	9/12/2013	Hagerstown
22395002528337	Test, Juv good		HAGERSTOWN	MD	21740	1/25/2004	Hagerstown
22395001952108	Test, Juv no blocks		HAGERSTOWN	MD	21740	9/23/1950	Hagerstown
22395002186912	test, patron		HAGERSTOWN	MD	21740		Hagerstown
RAIL01725	Test, RAIL 5 digits		HAGERSTOWN	MD	21740	9/23/1950	Hagerstown
RAIL048296	Test, RAIL 6 digits		HAGERSTOWN	MD	21740	9/23/2000	Hagerstown
22214010015494	Test, REL Adult fine block		OAKLAND	MD	21550	10/22/1984	Oakland Library
22214010015254	Test, REL Adult no blocks		WINCHESTER	VA	22602	2/3/1978	Oakland Library
22395999999999	Test-SimplyE, Patron1		HAGERSTOWN	MD	21740	6/23/1986	Hagerstown
22214999999999	Test-SimplyE, Patron1		OAKLAND	MD	21550	7/5/1991	Hagerstown
22395999999998	Test-SimplyE, Patron2		HAGERSTOWN	MD	21740	9/16/1967	Hagerstown

As always, if you have any Polaris questions, please feel free to contact me at [wtaylor@wmrl.info](mailto:wtaylor@wmrl.info) or 301-739-3250, ext. 552.