



# Polaris Permissions Overview

7.4

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## Granting Permissions

Polaris permissions control who can access, create, modify, or delete specific record types and who can perform specific tasks in Polaris. Most permissions that control access to and modification of record types are set for the organization that owns the specific record. Permissions that control the ability to do specific tasks are typically set at the system level.

You can set up permissions based on the needs of the organizations in your system, and the tasks that staff members are expected to do. To allow administrators to control all records and functions in Polaris, you can set up certain staff members as “Superusers” or add these staff members to the Administrator permission group.

Using the fine level of control available in Polaris permissions, your library can effectively manage the specific tasks your staff members can perform in Polaris. The flexibility of Polaris permissions provides libraries options to accommodate various staff responsibilities, such as:

- Check-out clerks cannot override circulation blocks, but the supervisor does have permission to override these blocks.
- Staff members at a large library system rotate among different branches. The staff members have a set of permissions that are the same for all but one branch. The one branch is more restrictive with the permissions granted to rotating staff.
- Senior catalogers have permissions to maintain authority records used by the entire library system. All other catalogers have permission to access the headings used in bibliographic records, but they cannot add any headings or change existing ones.
- The library system has a central acquisitions department, but individual branches maintain their own selection lists. The central acquisitions department can access each branch's selection lists, but only specific staff members at the branch can modify the lists.
- Each member library in a consortium prefers to keep its fund structure private. Libraries cannot view (access) each other's fund records.

When a staff member does not have the appropriate permission to do a patron services or circulation task, a permission block message appears. You can allow specific staff

members (typically supervisors) to override certain permission blocks so the blocked staff member can continue the task. Set the following profiles for staff members as appropriate: **Override acquisitions blocks**; **Override serials blocks**; **Override cataloging blocks**; **Override patron services blocks**; and **Find Tool: Override SQL search blocks**.

See also:

- [Permission Strategies](#)
- [Managing Organization Security](#)
- [Managing Permissions with Permission Groups](#)
- [Managing Permissions for Staff, Workstations, Groups](#)
- [Setting Administration Permissions](#)

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## Permission Strategies

You can manage permissions in Polaris using any of the following methods, according to your needs:

- **Set security for an organization's records** - Identify who is allowed to view and use an organization's records. Expand the Security folder for the organization in the Administration Explorer, select a permission, then find and select the staff members, workstations, and permission groups that should have the permission. All the permissions that can be set at an organization level are listed under **Security** for the organization in the Administration Explorer. See [Managing Organization Security](#).

**Tip:**

If you are implementing Polaris permissions for the first time, the group method is a convenient strategy. See [Using Groups to Set Initial Permissions](#).

- **Set up permission groups** - Set up permission groups with multiple permissions and add multiple staff members, workstations, and/or organizations to the group. You can add permissions to the group to give them to all group members, and add group members. For example, a Cataloging permission group might have most cataloging permissions except deleting records. If a new cataloger is joining the library, you can add her to the group to give her all the appropriate permissions in one step. See [Managing Permissions with Permission Groups](#).

- **Set permissions for an individual staff member or workstation** - For example, a staff member who works in acquisitions needs permission to import brief bibliographic records using the Express Import option. See [Managing Permissions for Staff, Workstations, Groups](#).

**Important:**

The PolarisSuperuser “staff member” and the Administrator permission groups have all permissions. The Superuser ensures there is always at least one person able to work in Polaris administration. Only one or two individuals should have access to this logon. The Administrator group simplifies giving Polaris administration permissions to backup administrators. Permissions cannot be taken away from the Superuser or Administrator permission groups, and these two records cannot be deleted.

See also:

- [Permission Availability and Record Ownership](#)
- [Permissions for Tasks](#)
- [Assigning Permissions to Workstations](#)
- [Permission Assignments at Upgrade](#)
- [Special Permissions for Rotating Staff](#)
- [Special Permissions for SQL Searches in the Find Tool](#)

### **Permission Availability and Record Ownership**

A specific set of permissions is available at the system, library, and branch level. While many permissions are set at the branch level, some permissions are available at all levels, and some are available only at the system level, only at the library level, or only at the branch level.

The permissions that control access and modifications to Polaris records can only be set at the organization level to which the record belongs. Some types of records can be owned at multiple organization administration levels. Other records can only be owned at a specific level. For example, item records can be owned at the system, library, and branch levels, but patron records can only be owned by a branch. Permissions to use item records are available and set independently at each level and for each organization. You set permissions for every organization that uses the associated records. Permissions to use patron records are available only at the branch level.

**Important:**

Bibliographic and item records can be maintained at the system, library, or branch level. Cataloging record permissions must be set for at least one organization. Typically, if the catalog is maintained by a central cataloging department for all organizations, the system level permissions are used. If each branch maintains its own cataloging records, assign the catalog record permissions for each branch.

**Note:**

See [Polaris Permission Groups - Default Permissions Reference](#) for a list of the record fields that indicate ownership for each type of Polaris record.

Several levels of permissions control access to and operations on an organization's records. For example, you need the appropriate Access permission to view an organization's bibliographic records, or even see those records in lists such as Find Tool results. Separate Create, Modify, and Delete permissions control the ability to do these operations on the organization's bibliographic records.

**Important:**

If you have the permission **Use 'own' cataloging record sets: Allow**, you can create record sets that no other users can access, including your system administrator. When you create a new cataloging record set, your user name is in the Owner box by default if you have this permission. To allow other users to access the record set, first select a different owner before saving the record set.

Some permissions are not organization-specific. These permissions are set at the system level and define access to options on the Polaris Shortcut Bar, access to specific tables in Polaris administration, or the ability to do certain tasks regardless of record ownership.

### Permissions for Tasks

Most workflows in the Polaris staff client require multiple task permissions. You do not need to set all permissions for all organizations. If an organization does not do particular tasks, the permissions for that workflow do not need to be set for the organization. For example, if a branch does not use Polaris Acquisitions because



selection, ordering, receiving, and invoicing are done at the main library, then the branch does not need acquisitions permissions.

### Assigning Permissions to Workstations

The ability to do a task in Polaris depends on the permissions set for both the staff member and the workstation. For security, libraries may want to restrict the tasks that can be done on a particular computer, even if the person logged on has permission to do the tasks.

**Example:**

A computer monitor at a reference desk is visible to the public in that area. The library is concerned about patron privacy, and wants to prevent patron account information from appearing on that computer, so that workstation does not have permission to view the library's patron records.

You can set permissions for individual workstations, or you can use the following options:

- Create permission groups specifically for workstations and assign permissions based on the security or privacy requirements of the workstations in the group.

**Note:**

Do not put restricted workstations in permission groups with access to system security or patron information. To view a workstation's permissions, go the Permissions view of the Workstation workflow. See [Managing Permissions for Staff, Workstations, Groups](#).

- To give workstations and staff members the same permissions, make the workstations members of the same permissions groups to which the staff members belong. This method ensures a staff member can always do their tasks. However, do not use this method for computers where privacy and system security are issues.
- To give all workstations in an organization the permissions of a group, make the organization a member of the permission group.

**Important:**

The Polaris Superuser logon overrides any permission restrictions of a workstation. The Polaris Superuser can do any task on any

workstation except access record sets owned by an individual staff member.

### Permission Assignments at Upgrade

When you upgrade to a new version of Polaris, new permissions may or may not be granted to existing staff members by default. (New permissions are always granted to members of the Administrator permission group.) If you prefer not to accept any Polaris default settings that grant new permissions to existing staff members, set the system-level Staff Client profile **Permissions: Use Polaris-defined new permission defaults** to **No**. This setting causes all new permissions to be set to **No** (not granted) at upgrade, but does not affect existing permission assignments or the Administrator permission group. The default setting is **Yes**.

#### Important:

If you want to set the Staff Client profile **Permissions: Use Polaris-defined new permission defaults** to **No**, you must set the profile before you upgrade to the new version of Polaris.

### Special Permissions for Rotating Staff

If the library rotates staff among branches, you can allow the rotating staff members to select a session branch at log-on. When a branch is selected, settings for that branch are in effect for the session (not the branch with which the staff member's user name is associated). For example, when a circulation staff member logs on to the current branch instead of the staff member's "home" branch, the system can route an item that fills a hold request correctly. The item is not routed to the staff member's "home" branch when it should be picked up at the current branch.

To enable staff members to select a branch at log-on, give both the staff member and the workstation these permissions:

- **Access logon branch: Allow** - Specifies who can log on to branches other than their own. The staff member can select a branch from a dialog box when logging on. This permission is set at the System level.
- **Logon branch: Access** - Specifies who can log on to a specific branch even though the staff member is not registered with the branch. The staff member can select a specific branch when logging in. This permission is set at the branch level.

The workstation's parent branch is the default selection in the Polaris Log On Branch dialog box. If the staff member does not have the **Logon branch: Access** permission for the workstation's branch, the default selection is the staff member's home branch. (If the staff member does not have the **Logon branch: Access** permission for the home branch, the first branch in the list of permissioned branches is the default selection.)

**Note:**

The user and logged-on branch for a Polaris staff client session are displayed at the top of the Polaris Shortcut bar and on the About Polaris dialog box (select **Help, About Polaris** on the Polaris Shortcut bar).

### Special Permissions for SQL Searches in the Find Tool

Three system-level permissions control the ability to use the Polaris Find Tool to do SQL searches. These permissions affect only the ability to do SQL queries in the Find Tool. No modifications to the database are possible from the Polaris Find Tool.

- **Find Tool: Access SQL mode - Allow** - The SQL option is available for selection on the Polaris Find Tool. The staff member can search in SQL mode.
- **Find Tool: Create or modify named SQL searches - Allow** - The **Save** and **Save As** options are available when the Find Tool is in SQL search mode. The staff member can save an SQL search and edit a saved search and save it.

**Note:**

If the staff member does not have this permission and selects **Save** or **Save As**, a permission block message appears. You can allow specific staff members to override the block. See [Set the Find Tool SQL permission blocks override](#).

- **Find Tool: Delete named SQL searches - Allow** - The **Delete** option is available when the Find Tool is in SQL search mode. The staff member can delete a saved SQL search.

**Note:**

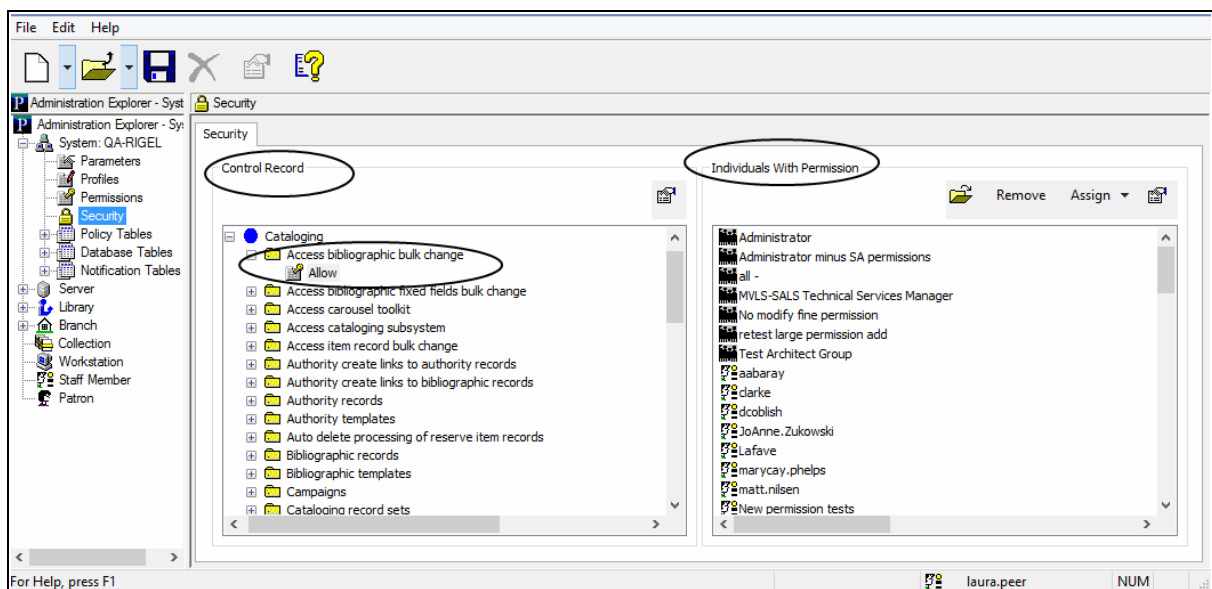
If the staff member does not have this permission and selects **Delete**, a permission block message appears. You can allow specific

staff members to override the block. See [Set the Find Tool SQL permission blocks override](#).




## Managing Organization Security

Using the Security view on the Administration Explorer, you can list all the permissions available at each organizational level in Polaris. You can grant permissions at the system level for administration and centralized functions, and each library and branch can identify who is allowed to use the organization’s records. In one step, you can add or remove multiple staff members, workstations, or permission groups for a selected permission at a particular organization.

In the Security view, the **Control Record** list displays all the permissions available for that level, organized in subsystem folders. The **Individuals with Permission** list displays all the staff members, workstations, and permission groups that have a selected permission.



Icons identify the following permission holders:

-  - Staff member
-  - Workstation
-  - Permission Group

**Note:**

Entire organizations may have permissions based on permission group

membership. The Permissions view for an organization lists the permissions that are granted to the specific organization due to its membership in a permission group. See [Managing Permissions with Permission Groups](#).

See also: [Manage organization security settings](#)

## Managing Permissions with Permission Groups

You can set up groups of staff members and workstations that are involved in the same types of tasks in the library, and assign the permissions to the group. For example, you can set up a Circulation Clerk permission group with the required permissions for circulating items. Then, you simply add the staff members and workstations to the Circulation Clerk permission group.

Permission group records are managed using the Permission Group workform. You can find and open a permission group record from the Polaris Shortcut Bar (select **Administration > Permission Group**), or the Administration Explorer menu bar (select **File > Open > Permission Group**).

**Note:**

To set up and manage groups, you need the **Permission Group** permissions (Access, Create, Delete, Modify), and permission to access any associated staff member, workstation, or organization records.

See also:

- [Group Permissions for Organizations](#)
- [Default Permission Groups](#)
- [Using Groups to Set Initial Permissions](#)
- [Create a new permission group](#)
- [Copy a permission group](#)
- [Manage permission group membership](#)

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### Group Permissions for Organizations

You can assign entire organizations (system, library, branch) to permission groups. Every staff member and workstation that is assigned to the organization gains the permissions of the group. Organization membership in a permission group is best used for library systems that use centralized cataloging, acquisitions, and serials processing. You can create a permission group that has access-only permissions for bibliographic, item, authority, serial control records, then make the entire system the member of the permission group. Every staff member and workstation for every organization in the

Polaris installation automatically has access to the records. However, they cannot modify, create, or delete the records, and you probably would not assign these types of permissions through organization group membership.

**Note:**

If a library is a member of a permission group, the staff members and workstations assigned to the library and its branches receive the group permissions. If a branch is a member of a permission group, only the staff members and workstations assigned to the branch receive the group permissions.

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## Default Permission Groups

Polaris is installed with default permission groups that already have many of the permissions needed to do common library workflows at all organizations. All you need to do is identify the staff and workstations that are members of the permission group. You can add or remove permissions from a default group to suit an organization's staff departmental structure and workflows. If you want stricter security, you can copy the default permission group, remove the permissions that do not apply to the new group, and give the permission group a different name.

**Example:**

In a system where each library needs to control access to patrons' personal information, you can copy the Polaris Circulation Clerk permission group and give it a name that identifies it for a circulation desk at a specific library. Remove the permissions that do not apply to the specific library. Include the circulation staff at the library as members of the new group. Repeat the process for each library that requires strict control of privacy information.

The names of the Polaris default permission groups begin with **Polaris**. To list the default permission groups in the Find Tool results list, search by name for **Polaris\***.

For a list of the default permission groups and the permissions associated with them, see [Polaris Permission Groups - Default Permissions Reference](#).



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## Using Groups to Set Initial Permissions

If you are setting up Polaris permissions for the first time, you may find this method useful:

1. Make lists of the following information:

- All organizations (system, libraries, and branches)

**Note:**

A library must also have a branch of the same name. See [Setting Statistical Codes for Reports](#).

- Departments for each organization
- Staff members in each department
- Supervisors or managers of each department
- Workstation names and where they are used

These lists help identify how many permission groups you may need to set up, and the possible members of the groups. Every department for each organization may be a group. You may want a supervisor group for each department, or combine all supervisors into a single group at each organization. You probably need a Circulation clerk group at every branch.

2. Review areas of organizational responsibilities, and compile a list of functional areas in each department.

Work such as administration, cataloging, serials processing, or acquisitions in large library systems or consortia may be centralized. In this case, you may need a single permission group for catalogers. If each library is responsible for its own technical services, you may need multiple cataloging groups, one for every library that maintains its own cataloging records.

Certain departments may have several functional areas, so they may need a finer division of group responsibilities. For example, a Technical Services department may need a permission group for catalogers and a separate permission group for the people doing acquisitions and serials processing. The list may be based on work area or job descriptions.

3. Compile a list of permission groups based on the information you have gathered, and the decisions you have made.

4. Create the permission groups in Polaris Administration, or adapt the Polaris default groups. See [Managing Permissions with Permission Groups](#).
5. Set the Staff Client profile **Generate security history** to **No** until you have completed initial permissions setup. See [Setting Staff Client Profiles](#).
6. Give each group the permissions needed to do the tasks for the purpose of the group. See [Assign permissions to staff, workstation, or group](#).
7. Assign the members to each permission group. See [Manage members in a permission group](#).
8. Ask a member from each permission group to test the setup by doing their normal tasks.

## Managing Permissions for Staff, Workstations, Groups

The Permissions view for a specific group, staff member, or workstation lists all the permissions that have been assigned to the record. You can add or remove multiple permissions that apply to several organizations in a single operation. You can also see which permissions are directly assigned and which permissions are assigned through group membership. The Permissions view also lists the groups in which a staff member or workstation is a member. You can change the group membership by adding memberships, copying group memberships from another record, or removing group memberships.

You can display the Permissions view by selecting **Permissions** under a workstation or staff member in the Administration Explorer tree view, or by selecting **View, Permissions** in a workflow. To work with a permission group record, you must open the Permission Group workflow.

**Note:**


To work with workstation, staff, and Permission Group permissions, you must have **Access** and **Modify** permissions for the appropriate record type (including Permission Groups) and for **Object/task control record**.

See also:

- [Finding Permissions](#)
- [Assign permissions to staff, workstation, or group](#)
- [Copy \(acquire\) permission settings](#)
- [Manage permission group membership](#)
- [Copy \(acquire\) permission group memberships](#)
- [Remove directly-assigned permissions](#)
- [Remove selected group-assigned permissions](#)

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### Finding Permissions

To find permissions, first open the Staff, Workstation, or Permission Group workflow, go to the Permissions view, and click . See [Assign permissions to staff, workstation, or group](#). You can use the Find Tool options to do precise searches and sort the permissions.

**Example:**

Find all permissions related to Community Library’s bibliographic records:

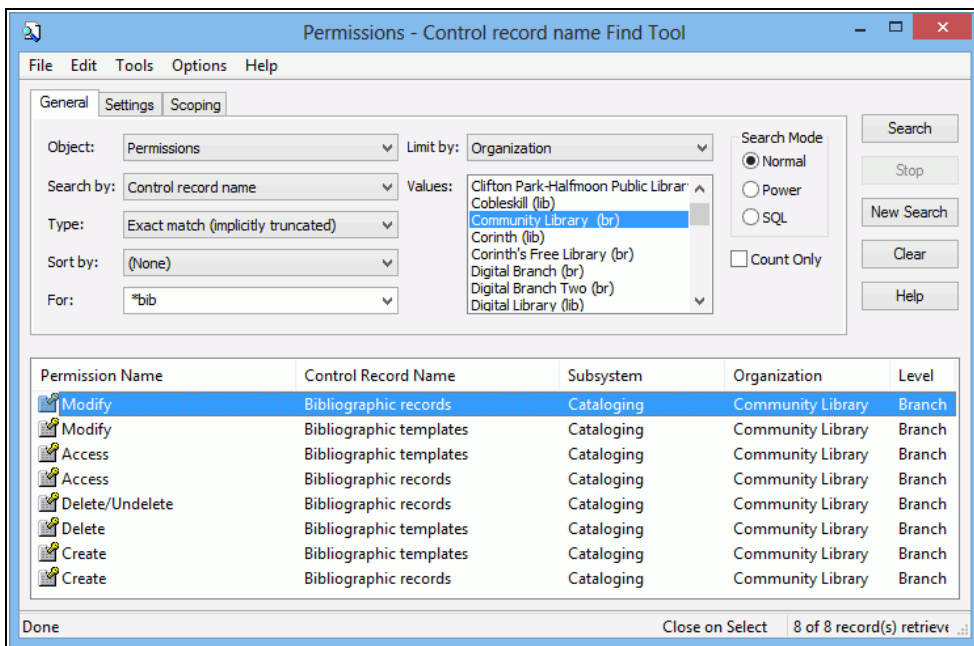
**Object = Permissions**

**By = Control Record Name**

**Type = Exact match (implicitly truncated)**

**For = \*bib**

**Limit by: Organization, Community Library**



You can search for permissions using the following access points and values. These same access points are also available as **Limit by** filters in the Find Tool.

Search By (mnemonic)	Purpose	Values
Control Record Name (CRN)	Finds permissions by their control record name (the category name listed in the Security view of the Administration Explorer). This search finds both object and task	Type the name of any permission control record in the <b>For</b> box. Examples: <b>Bibliographic records, Item records, Renew items, Modify free days.</b>

Search By (mnemonic)	Purpose	Values
	permissions.	
Organization (ORG)	Finds permissions that can be set by an organization.	Type an organization name in the <b>For</b> box.
Permission Name (PNAME)	Finds permissions by their action type.	<p>Any text in the <b>For</b> box is valid.</p> <p>Common actions: Access, Allow, Create, Delete, Modify.</p> <p>Less common actions: Adjust, Approve, Cancel, Change, Check-in, Convert, Credit, Deny, Display, Override, Pay, Print, Renew, Release, Send, Transfer, Uncheck-in.</p>
Subsystem (SUBSYS)	Finds permissions by their associated subsystem.	<p>Type any of the following names in the <b>For</b> box:</p> <p>Acquisitions, Cataloging, Circulation, Public Access Catalog, System Administration, Serials, Find Tool, Polaris Fusion</p>

## Setting Administration Permissions

Administration permissions control access to the various workforms, tables, and controls needed to administer Polaris. Typically, Polaris administrators need the administration permissions. However, other staff members may require access to certain administration tables and controls to set up specific processes. For example, senior catalogers may require administration permissions related to MARC validation. To assign administration permissions, you must have the following permissions:

- **Access administration: Allow**
- **System: Access**
- **Object/task control record: Access**
- **Object/task control record: Modify**

Most administration permissions are set at the system level. You can use the Security view at the system level on the Administration Explorer, or set the permissions from individual group, workstation, and staff member workforms.

Even with specific System Administration permissions set at the system level, you also need access permissions to an administration level (**System: Access; Library: Access; Branch: Access**) to change any parameters or profiles for those levels. However, granting access to any level allows administration access to all organizations at that level, so be cautious in assigning administrative permissions. For large installations, you may need to distribute the work load, but you should limit access to system-level administration to only a few people. Other administrators can do most administration functions with access limited to the Library or Branch administration levels.

**Note:**

You may want to add the primary Polaris administrators to the Administrators group, in case the Polaris SuperUser logon is unavailable. The Administrators group has all permissions.

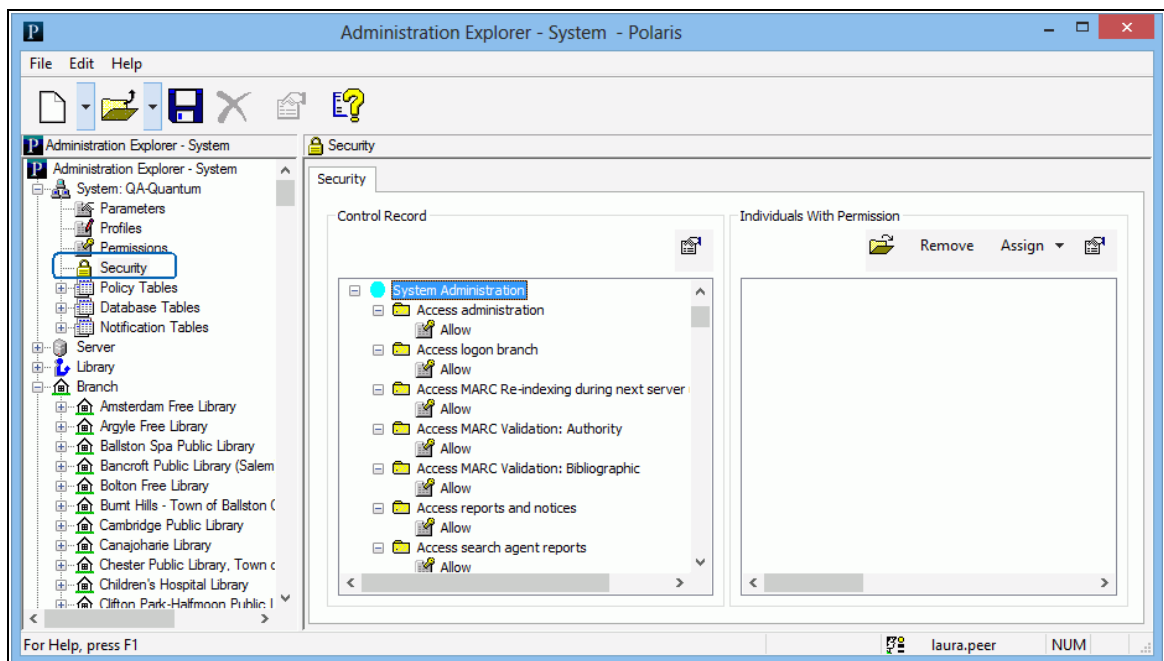
See also:

- [Grant administration permissions](#)
- [Administration Workflow Permissions](#)

## Grant Administration Permissions

To assign the permissions that control access to Polaris administration:

1. In the Administration Explorer, select **Security** for the System level. The Security view is displayed.
2. Select (highlight) **System Administration** in the **Control Record** list, and press **ALT+\*** (on the numeric key pad). The System Administration permission tree expands to display all the System Administration permissions.



3. Identify who can set permissions. See the Patron Services Administration PDF Guide, Permissions to Set Permissions. [Permissions to Set Permissions](#).
4. Identify who can maintain organizational information. [Manage organization security settings](#).
5. Identify who can maintain group, workstation, and staff member records. See [Permission Group, Workstation, Staff Member Record Permissions](#).
6. Identify who can work with specific permissions as assigned to groups (such as cataloging or circulation administration tables, public access search and display tables, and acquisitions tables. See [Manage Permission Group Membership](#).
7. Select **File > Save**.

**Related Information**

- General information about permissions - See [Permission Strategies](#).
- Specific System Administration permissions - See [Find Tool Permissions Reference](#).
- Using the Security view - See [Managing Organization Security](#).
- Permission Groups - See [Managing Permissions with Permission Groups](#).
- Setting permissions from a workflow - See [Managing Permissions for Staff, Workstations, Groups](#).

**Administration Workflow Permissions**

This section lists the combinations of permissions needed for specific administration workflows.

**Note:**

For an alphabetical list of all System Administration permissions, see [Find Tool Permissions Reference](#). For more information about setting permissions in Polaris, see [Permission Strategies](#).

**Permissions to Set Permissions**

Workflow	Required Permissions	Administration Explorer Security Location
Authorize others to set permissions	Access administration: Allow	System - System Admin
	Object/task control record: Access	System - System Admin
	Object/task control record: Modify	System - System Admin
	Staff members: Access	System, Library, Branch - System Admin
	System: Access	System - System Admin
	Workstations: Access	System, Branch - System Admin



Workflow	Required Permissions	Administration Explorer Security Location
Maintain security for a library. These permissions are required to allow individuals to set local permissions.	Access administration: Allow	System - System Admin
	Object/task control record: Access	System - System Admin
	Object/task control record: Modify	System - System Admin
	Libraries: Access	System - System Admin
	Branches: Access	System - System Admin
	Groups: Access	System - System Admin
	Staff members: Access	System, Library, Branch - System Admin
	Workstations: Access	System, Library, Branch - System Admin
Maintain permissions for groups, staff members, and workstations	Access administration: Allow	System - System Admin
	Object/task control record: Access	System - System Admin
	Object/task control record: Modify	System - System Admin
	Permission Groups: Access	System - System Admin
	Staff members: Access	System, Library, Branch - System Admin
	Workstations: Access	System, Library, Branch - System Admin

**Organization Maintenance Permissions**

Workflow	Required Permissions	Administration Explorer Security Location
Create new organizations	Access administration: Allow	System - System Admin
	Branches: Access	System - System Admin
	Branches: Create	System - System Admin
	Libraries: Access	System - System Admin
	Libraries: Create	System - System Admin
Maintain resource groups	Access administration: Allow	System - System Admin
	Resource Group: Access	System - System Admin
	Resource Group: Create	System - System Admin
	Resource Group: Delete	System - System Admin
	Resource Group: Modify	System - System Admin
Maintain system organizational information	Access administration: Allow	System - System Admin
	Modify parameters: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
	System: Access	System - System Admin
	System: Modify	System - System Admin

Workflow	Required Permissions	Administration Explorer Security Location
<p>Administer system-wide address and contact information (add these permissions to the system maintenance permissions). These permissions can be added to library-level and branch-level administration permissions, but any changes apply to the entire system.</p>	Access tables: Allow	System - System Admin
	Modify address table: Allow	System - System Admin
	Modify contact persons table: Allow	System - System Admin
	Modify countries table: Allow	System - System Admin
	Modify dates closed table: Allow	System - System Admin
	Modify postal codes table: Allow	System - System Admin
<p>Administer record operations and transactions (add these permissions to the system maintenance permissions). These permissions can be added to library-level and branch-level administration permissions.</p>	Access tables: Allow	System - System Admin
	Modify object locks table: Allow	System - System Admin
	Modify transaction logging table: Allow	System - System Admin
<p>Maintain and change organizational information</p>	Access administration: Allow	System - System Admin
	Branches: Access	System - System Admin
	Branches: Modify	System - System Admin
	Libraries: Access	System - System Admin
	Libraries: Modify	System - System Admin
<p>Maintain organizational</p>	Access administration:	System - System Admin

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
parameters and profiles	Allow	
	Branches: Access	System - System Admin
	Libraries: Access	System - System Admin
	Modify parameters: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
Administer collections	Access administration: Allow	System - System Admin
	Collections: Access	System - System Admin
	Collections: Create	System - System Admin
	Collections: Delete	System - System Admin
	Collections: Modify	System - System Admin
Administer servers	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify search databases table: Allow	System - System Admin
	Servers: Access	System - System Admin
	Servers: Modify	System - System Admin
	Servers: Create	System - System Admin
	Servers: Delete	System - System Admin

**Permission Group, Workstation, Staff Member Record Permissions**

Workflow	Required Permissions	Administration Explorer Security Location
Administer staff members	Access administration: Allow	System - System Admin
	Modify parameters: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
	Staff members: Access	System, Library, Branch - System Admin
	Staff members: Create	System, Library, Branch - System Admin
	Staff members: Modify	System, Library, Branch - System Admin
	Staff members: Delete	System, Library, Branch - System Admin
Administer permission groups. Access to Libraries and Branches can be added to administer permission groups.	Access administration: Allow	System - System Admin
	Permission Groups: Access	System - System Admin
	Permission Groups: Create	System - System Admin
	Permission Groups: Modify	System - System Admin
	Permission Groups: Delete	System - System Admin
	Staff members: Access	System, Library, Branch - System Admin
	Workstations: Access	System, Library, Branch - System Admin
Administer workstations	Access administration: Allow	System - System Admin

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
	Modify parameters: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
	Workstations: Access	System, Library, Branch - System Admin
	Workstations: Create	System, Library, Branch - System Admin
	Workstations: Modify	System, Library, Branch - System Admin
	Workstations: Delete	System, Library, Branch - System Admin

**Cataloging Administration Permissions**

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
Set automatic bib and authority re-indexing during next server upgrade	Access MARC Re-index during next server upgrade: Allow	System - System Admin
Set MARC validation rules and policies	Access administration: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
	Access MARC Validation: Authority: Allow	System - System Admin
	Access MARC Validation: Bibliographic: Allow	System - System Admin

Workflow	Required Permissions	Administration Explorer Security Location
	MARC Validation: Authority - insert row: Allow	System - System Admin
	MARC Validation: Authority - modify row: Allow	System - System Admin
	MARC Validation: Authority - delete row: Allow	System - System Admin
	MARC Validation: Bibliographic - insert row: Allow	System - System Admin
	MARC Validation: Bibliographic - modify row: Allow	System - System Admin
	MARC Validation: Bibliographic - delete row: Allow	System - System Admin
Set duplicate catalog record detection criteria	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify bibliographic deduplication table: Allow	System - System Admin
	Modify bibliographic tags to retain/delete tables: Allow	System - System Admin
	Modify authority overlay retention table: Allow	System - System Admin
	Modify authority record	System - System Admin

Workflow	Required Permissions	Administration Explorer Security Location
	import: preferred cataloging source: Allow	
Set miscellaneous catalog record policies	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify call number hierarchy table: Allow	System - System Admin
	Modify item price hierarchy table: Allow	System - System Admin
	Modify item block descriptions table: Allow	System - System Admin
	Modify initial articles table: Allow	System - System Admin
	Modify import blackout times	System - System Admin
Set label configuration profiles	Access administration: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
	You may limit access to a subset of these levels: Branches: Access Libraries: Access System: Access Workstations: Access Staff members: Access	Various levels - System Admin



**Circulation Administration Permissions**

Workflow	Required Permissions	Administration Explorer Security Location
<p>Set up circulation codes and labels (add these permissions to the system maintenance permissions). These permissions can be added to library and branch level administration permissions, but any changes apply to the entire system.</p>	Access tables: Allow	System - System Admin
	Modify circulation status table	System - System Admin
	Modify claim reason table: Allow	System - System Admin
	Modify fee descriptions table: Allow	System - System Admin
	Modify fine codes table: Allow	System - System Admin
	Modify hold status table: Allow	System - System Admin
	Modify item block descriptions table: Allow	System - System Admin
	Modify patron codes table: Allow	System - System Admin
	Modify patron stop descriptions table: Allow	System - System Admin
	Modify material types table: Allow	System - System Admin
	Modify loan period codes table: Allow	System - System Admin
	Modify patron statistical class codes table: Allow	System - System Admin
	Modify NCIP User Privilege Types table: Allow	System - System Admin

Workflow	Required Permissions	Administration Explorer Security Location
Maintain circulation limits, rates, and schedules (add these permissions to the system maintenance permissions). These permissions can be added to library and branch level administration permissions.	Access tables: Allow	System - System Admin
	Modify fines table: Allow	System - System Admin
	Modify loan periods table: Allow	System - System Admin
	Modify patron/materials type loan limit blocks table: Allow	System - System Admin
	Modify payment methods table: Allow	System - System Admin
Set policies for floating collections	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify floating material type limits table: Allow	System - System Admin
	Modify floating material types table: Allow	System - System Admin
	Modify floating to branch table: Allow	System - System Admin
Maintain self-check attributes	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify self check material types table: Allow	System - System Admin
	System: Access	System - System Admin
Maintain notice settings	Access administration: Allow	System - System Admin

Workflow	Required Permissions	Administration Explorer Security Location
	Access reports and notices: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
	Modify notification dates not to call table: Allow	System - System Admin
	Modify notification local area codes table: Allow	System - System Admin
	Modify notification local prefix table: Allow	System - System Admin
	System: Access	System - System Admin
Maintain hold request routing schedule	Access administration: Allow	System - System Admin
	System: Access	System - System Admin
	Access tables: Allow	System - System Admin
	Modify holds routing sequence table: Allow	System - System Admin
Edit hold request status descriptions	Access administration: Allow	System - System Admin
	System: Access	System - System Admin
	Access tables: Allow	System - System Admin
	Modify hold status table: Allow	System - System Admin
Set up and maintain course reserve functions	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin

Workflow	Required Permissions	Administration Explorer Security Location
	Modify course reserve tables: Allow	System - System Admin
	Modify parameters: Allow	System - System Admin
Specify mobile phone service carriers for selection in the Patron Registration workform and when patrons register or update their account information from the PAC	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify mobile phone carriers: Allow	System - System Admin
Set up and maintain outreach service functions	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify outreach services tables: Allow	System - System Admin
	Modify parameters: Allow	System - System Admin
Administer NCIP - Map data to Polaris data and set parameters	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify NCIP medium types incoming table: Allow	System - System Admin
	Modify NCIP medium types outgoing table: Allow	System - System Admin
	Modify NCIP user privilege types table: Allow	System - System Admin

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
	Modify NCIP Payment Types table: Allow	System - System Admin
	Modify NCIP Fiscal Action Types table: Allow	System - System Admin
	Modify SIP Payment Types table: Allow	System - System Admin

**Public Access Administration Permissions**

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
Maintain catalog results settings	Access administration: Allow	System - System Admin
	System: Access	System - System Admin
	Access tables: Allow	System - System Admin
	Modify shelf locations table: Allow	System - System Admin
	Modify cross reference display constants table: Allow	System - System Admin
	Modify item availability display order table: Allow	System - System Admin
Maintain catalog search settings	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify search databases table: Allow	System - System Admin

Workflow	Required Permissions	Administration Explorer Security Location
	System: Access	System - System Admin
Set up and modify override phrases for Did You Mean search suggestions in the PAC	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify did you mean overrides table: Allow	System - System Admin
Set up PAC displays for bibliographic and community information searches and search results	Access administration: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
	Modify bibliographic record title displays: Allow	System - System Admin
	Modify community record title displays: Allow	System - System Admin
	Modify and create display entities: Allow	System - System Admin
	Modify product page categories: Allow	System - System Admin
	Modify PAC limit by display table: allow	System - System Admin
	Modify PAC community limit by display table: allow	System - System Admin
	System: Access	System - System Admin
Enter or edit geographic coordinates for organizations that might be displayed with the	Access administration: Allow	System - System Admin

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
Map It (Google Maps) feature in Polaris PowerPAC		
	Access tables: Allow	System - System Admin
	Modify geographic coordinates table: Allow	System - System Admin
	System: Access	System - System Admin

**Acquisitions Administration Permissions**

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
Maintain acquisitions settings	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify links to supplier databases: Allow	System - System Admin
	Modify donation fund category table: Allow	System - System Admin
	Modify currencies table: Allow	System - System Admin
	System: Access	System - System Admin

**Serials Administration Permissions**

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
Set parameters and profiles related to Serials	Access administration: Allow	System - System Admin
	Modify parameters: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
	System: Access	System - System Admin

**WebAdmin Permissions**

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
Use Polaris Language Editor (Web Admin) to customize language strings for Polaris products	WebAdmin access: Allow	System - System Admin



## Polaris General Permissions Reference

This section includes tables showing: the permissions required to create and use SQL searches in the Find Tool; the default permissions for Polaris permission groups; and the fields that identify record ownership in Polaris records and the organizations that can own them.

See also:

- [Find Tool Permissions Reference](#)
- [Polaris Permission Groups - Default Permissions Reference](#)
- [Record Ownership Fields Reference](#)

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### Polaris Permission Groups - Default Permissions Reference

The following table lists the permissions initially assigned to the default permission groups. The permissions are granted for all organizations in your Polaris installation. You can change any of the permissions for the default groups. For more information about working with permissions and groups, see [Granting Permissions](#).

**Note:**

The default permission groups are offered as a convenient way to manage permissions, but they do not include all possible permissions, and they are not updated with new permissions when you install new releases of Polaris. If you use the Polaris default groups, be sure to add the appropriate permissions to the groups.

Permission Group Name	Permission Type	Initial Permissions
Administrator Cannot be deleted. Membership in this group should be limited to Polaris administrators.	(All)	(All permissions at all organizations)

Permission Group Name	Permission Type	Initial Permissions
Polaris Circulation Clerk - Basic front desk tasks.	Access circulation control	• Allow

Permission Group Name	Permission Type	Initial Permissions
	Access patron services	• Allow

Permission Group Name	Permission Type	Initial Permissions
	Access hold request manager	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
	Access reports and notices	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
	Fines: waive fines at circ	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
	Modify due date and time	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
	Modify hold queues	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
	Patron Registration	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Override blocks to delete</li> </ul>
	Patron Status	<ul style="list-style-type: none"> <li>• Access</li> <li>• Access notice history</li> <li>• Access patron account</li> <li>• Access patron account: transaction summary</li> <li>• Create/delete patron blocks</li> <li>• Display associations</li> <li>• Display claimed items</li> <li>• Display hold request list</li> <li>• Display items checked-out</li> <li>• Display notes</li> <li>• Display patron blocks</li> <li>• Display reader services</li> <li>• Modify patron account</li> </ul>

Permission Group Name	Permission Type	Initial Permissions
	Renew items	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
Polaris Serials Clerk - Receive and process serials.	Access serials	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
	Serial Issues/Standing Order Parts	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Delete</li> <li>• Check-in</li> <li>• Uncheck-in</li> </ul>
	Create a bib record from Acquisitions and Serials	<ul style="list-style-type: none"> <li>• Allow</li> </ul>

Permission Group Name	Permission Type	Initial Permissions
Polaris Serials Manager - Set up serials and subscriptions, as well as do all tasks of the Polaris Serials Clerk.	Access serials	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
	Serial Issues/Standing Order Parts	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Delete</li> <li>• Check-in</li> <li>• Uncheck-in</li> </ul>
	Serial holdings records	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Delete</li> </ul>
	Supplier	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Delete</li> </ul>
	Create a bib record from Acquisitions and Serials	<ul style="list-style-type: none"> <li>• Allow</li> </ul>

Permission Group Name	Permission Type	Initial Permissions
Polaris Ordering Staff - Create purchase orders.	Access acquisitions	• Allow
	Bibliographic records	• Access
	Create a bib from Acquisitions and Serials	• Allow
	Fiscal Years	• Access
	Funds	• Access
	Purchase Orders	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Delete</li> <li>• Print purchase orders</li> <li>• Print workslips</li> </ul>
	Selection Lists	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Delete</li> </ul>
	Suppliers	• Access

Permission Group Name	Permission Type	Initial Permissions
Polaris Invoicing Staff - Receive shipments from vendors.	Access acquisitions	• Allow
	Bibliographic records	• Access
	Create a bib from Acquisitions and Serials	• Allow
	Fiscal Years	• Access
	Funds	• Access
	Invoices	• Access • Create • Modify • Delete • Pay, Undo payment, Credit • Print vouchers
	Purchase Orders	• Access • Modify
	Serial Issues/Standing Order Part	• Access • Modify
Polaris Acquisitions Collection Development - Request the purchase of material using selection lists.	Access acquisitions	• Allow
	Selection Lists	• Access
	Selection list line item segments	• Create • Modify • Delete
	Bibliographic records	• Access
	Funds	• Access



Permission Group Name	Permission Type	Initial Permissions
Polaris Acquisitions Manager - Authorize purchase order release and payment of invoices, and do maintenance on all acquisitions records.	Access acquisitions	<ul style="list-style-type: none"> <li>• Allow</li> </ul>

Permission Group Name	Permission Type	Initial Permissions
	Bibliographic records	• Access

Permission Group Name	Permission Type	Initial Permissions
	Create a bib from Acquisitions and Serials	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
	Fiscal Years	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Delete</li> </ul>
	Funds	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Delete</li> <li>• Transfer money between funds</li> </ul>
	Invoices	<ul style="list-style-type: none"> <li>• Access</li> <li>• Adjust</li> <li>• Create</li> <li>• Modify</li> <li>• Delete</li> <li>• Print vouchers</li> <li>• Pay, Undo payment, Credit</li> </ul>
	Purchase Orders	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Delete</li> <li>• Print purchase orders</li> <li>• Print workslips</li> <li>• Release, receive, cancel,</li> </ul>

Permission Group Name	Permission Type	Initial Permissions
		close PO • Release order exceeding fund encumbrance limits • Release order resulting in negative free balance • Send electronic purchase orders
	Selection list line item segments	• Create • Modify • Delete
	Selection Lists	• Access • Create • Modify • Delete • Approve/Reject
	Suppliers	• Access • Create • Modify • Delete
Polaris Bib Full Cataloger - Original cataloging.	Access cataloging subsystem	• Allow
	Access item record bulk change	• Allow
	Authority records	• Access • Create • Modify

Permission Group Name	Permission Type	Initial Permissions
		• Delete/Undelete

Permission Group Name	Permission Type	Initial Permissions
	Authority templates	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Delete</li> </ul>
	Bibliographic records	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Delete/Undelete</li> </ul>
	Bibliographic templates	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Delete</li> </ul>
	Cataloging record sets	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Delete</li> </ul>
	Create a bib record from the item or item template	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
	Import bibliographic, item, and authority records	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
	Item records	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Delete/Undelete</li> <li>• Modify header</li> <li>• Modify cataloging view</li> </ul>

Permission Group Name	Permission Type	Initial Permissions
		<ul style="list-style-type: none"> <li>• Modify source and acquisitions view</li> <li>• Modify reserves view</li> </ul>
	Item templates	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Delete</li> </ul>
	Use 'own' cataloging record sets	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
	Use 'own' authority templates	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
	Use 'own' bibliographic templates	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
	Use 'own' item templates	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
	Polaris Bib Copy Cataloger	Access cataloging subsystem
Bibliographic records		<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Delete/Undelete</li> </ul>
Bibliographic templates		<ul style="list-style-type: none"> <li>• Access</li> </ul>
Item records		<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Delete/Undelete</li> <li>• Modify cataloging view</li> <li>• Modify header</li> </ul>

Permission Group Name	Permission Type	Initial Permissions
		<ul style="list-style-type: none"> <li>• Modify history view</li> <li>• Modify reserves view</li> <li>• Modify source and acquisition view</li> </ul>
Polaris Item Cataloger - Process new items.	Access cataloging subsystem	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
	Bibliographic records	<ul style="list-style-type: none"> <li>• Access</li> </ul>
	Item records	<ul style="list-style-type: none"> <li>• Access</li> <li>• Bulk change</li> <li>• Create</li> <li>• Delete/Undelete</li> <li>• Modify cataloging view</li> <li>• Modify header</li> <li>• Modify history view</li> <li>• Modify reserves view</li> <li>• Modify source and acquisition view</li> </ul>
	Item templates	<ul style="list-style-type: none"> <li>• Access</li> </ul>
Polaris Authority Control Cataloger- Maintain authority control for the catalog database.	Access cataloging subsystem	<ul style="list-style-type: none"> <li>• Allow</li> </ul>
	Authority records	<ul style="list-style-type: none"> <li>• Access</li> <li>• Create</li> <li>• Modify</li> <li>• Delete/Undelete</li> </ul>
	Authority templates	<ul style="list-style-type: none"> <li>• Access</li> </ul>
	Bibliographic records	<ul style="list-style-type: none"> <li>• Access</li> </ul>



## Find Tool Permissions Reference

These permissions are available under **Security, Find Tool** on the Administration Explorer, at the system level only. Staff members who use the Polaris Find Tool to do SQL searches require one or more of these permissions.

**Note:**

For general information about setting permissions in Polaris, see [Granting Permissions](#). For information on permission block overrides, see [Set the Find Tool SQL permission blocks override](#).

Control Record	Permission	Description
Find Tool: Access SQL mode	Allow	The SQL option is available for selection on the Polaris Find Tool, and the staff member can search in SQL mode.
Find Tool: Create or modify named SQL searches	Allow	The <b>Save</b> and <b>Save As</b> options are available when the Find Tool is in SQL search mode. If the staff member does not have this permission and selects <b>Save</b> or <b>Save As</b> , a permission block message appears. You can allow specific staff members to

Control Record	Permission	Description
		override the block.
Find Tool: Delete named SQL searches	Allow	The <b>Delete</b> option is available when the Find Tool is in SQL search mode. If the staff member does not have this permission and selects <b>Delete</b> , a permission block message appears. You can allow specific staff members to override the block.

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## Record Ownership Fields Reference

This section lists the fields that identify record ownership in Polaris records and the organizations that can own them. Many Polaris permissions are based on record ownership. See [Permission Strategies](#).

Record Type	Owning Organization	Ownership Field on Workform
<i>Acquisitions</i>		

Record Type	Owning Organization	Ownership Field on Workform
Claim record	Branch	Ordered at (Name) in linked PO
Fiscal Year	Branch	Owner
Fund	Branch	Owner
Invoice	Branch	Paid by (Name)
Purchase Order	Branch	Ordered at (Name)
Selection List	Library	Created at (Library)
<i>Cataloging</i>		
Authority	System System, Library, Branch	(No field - always owned by system)
Authority template	System, Library, Branch	Template owner
Bibliographic	System, Library, Branch	Owner
Bibliographic template	System, Library, Branch	Template owner
Course reserve	System, Library, Branch	Owner
Course reserve template	System, Library, Branch	Template owner
Item	System, Library, Branch	Owner
Item template	System, Library, Branch	Template owner
Reserve item template	System, Library, Branch	Template owner
<i>Circulation/Patron Services</i>		

Record Type	Owning Organization	Ownership Field on Workform
Hold request	Branch	Pickup branch
ILL request	Branch	Pickup branch
Patron registration	Branch	Registered at
Patron status	Branch	Registered at
Community		
Community	System, Library, Branch	Owner
<i>Serials</i>		
Route list	System, Library, Branch	Owner
Serial holdings	Branch	Destination
Serial issues/Standing order parts	Branch	Destination
Subscription	System, Library, Branch	Owner
Suppliers	Branch	Owner

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### Leap Permissions Reference

These permissions are available under Security, Leap on the Administration Explorer. They control the ability to access Leap and Leap Offline.

Control Record	Org Levels	Permission	Description
Access Leap	System	Allow	Access the Leap Web App
Access Leap remotely	System	Allow	Access the Leap Web App remotely

Control Record	Org Levels	Permission	Description
Setup offline	System	Allow	Allow setup of Leap Offline app

## System Administration Permissions Reference

These permissions are available under **Security, System Administration** on the Administration Explorer, at the listed organizational levels. Polaris Administrators typically require these permissions. However, other staff members may require access to specific tables. For example, senior catalogers may require permissions related to MARC validation profiles.

**Note:**

For a list of permissions needed for specific workflows, see [Administration Workflow Permissions](#). For general information about setting permissions in Polaris, see [Granting Permissions](#).

Control Record	Org Levels	Permission	Description
Access administration	System	Allow	Administer Polaris; open and use the Polaris Administration menu on the Polaris Shortcut Bar.
Access logon branch	System	Allow	Log on to branches other than the Home branch; often used for rotating staff.
Access MARC Re-indexing during next server upgrade	System	Allow	Set the system-level Cataloging parameter <b>MARC Re-index during next server upgrade</b> to <b>Yes</b> . When the server upgrade is complete, the parameter is automatically reset to <b>No</b> .

Control Record	Org Levels	Permission	Description
Access MARC Validation: Authority	System	Allow	Open the MARC Validation: Authority profile in System Administration
Access MARC Validation: Bibliographic	System	Allow	Open the MARC Validation: Bibliographic profile in System Administration
Access reports and notices	System	Allow	Generate reports; generate overdue, hold, fine, and other notices; use the Utilities, Reports and Notices option available from the Polaris Shortcut Bar.
Access search agent reports	System	Not used	
Access tables	System	Allow	Review and change the database and policy tables from the Administration Explorer and organization workforms.
Branches	System	Access; Create; Modify	Work with Branch administration records (Access permission is needed to search for branches and

Control Record	Org Levels	Permission	Description
			open the Branches folder in the Administration Explorer.)
Collections	System	Access; Create; Modify	Work with Collections administration records (Access permission is needed to search for the collections and open the Collections folder in the Administration Explorer.)
INN-Reach administration	System	Access; Modify	Work with the INN-Reach Administration tool to monitor INN-Reach processes on the local server
Libraries	System	Access; Create; Modify	Work with Library administration records (Access permission is needed to search for libraries and open the Library folder in the Administration Explorer.
Logon branch	Branch	Access	Log on to the branch even though



Control Record	Org Levels	Permission	Description
			the user name is not associated with the branch; often used for rotating staff. (The staff member must also have the Access logon branch: Allow permission set at the System level.
MARC Validation: Authority -delete row	System	Allow	Delete validation rules for locally-defined MARC authority tags. All organizations use the settings in this Cataloging profile.
MARC Validation: Authority- insert row	System	Allow	Add rules to validate locally-defined MARC authority tags. All organizations use the settings in this Cataloging profile.
MARC Validation: Authority - modify row	System	Allow	Edit the settings for the authority validation rules.
MARC Validation: Bibliographic - delete row	System	Allow	Delete validation rules for locally-defined bibliographic tags. All organizations use the settings in

Control Record	Org Levels	Permission	Description
			this Cataloging profile.
MARC Validation: Bibliographic - insert row	System	Allow	Add rules to validate locally-defined MARC bibliographic tags. All organizations use the settings in this Cataloging profile.
MARC Validation: Bibliographic - modify row	System	Allow	Edit the settings for the bibliographic validation rules.
Modify address table	System	Allow	Maintain organization addresses. Add and delete entries in the Addresses policy table. All organizations use the settings in this table.
Modify and create display entities	System	Allow	Controls access to the Entities Definition dialog box, launched from the Title Display Configure or Community Information Configure dialog boxes. Edit existing display elements

Control Record	Org Levels	Permission	Description
			(entities) or define custom entities (bibliographic entities only) for PAC search results displays.
Modify authority control table	System	Allow	Future functionality; do not assign to staff.
Modify authority deduplication table	System	Allow	Determine the rules for identifying duplicate authority records when authority records are imported. Add and delete entries in the Authority Deduplication policy table. All organizations use the settings in this table.
Modify authority overlay retention table	System	Allow	Add and delete entries in the Authority Overlay Retention table that identifies authority tags that must be transferred to overlay records. All organizations use the settings in this table.

Control Record	Org Levels	Permission	Description
Modify authority record import: preferred cataloging source	System	Allow	Add and delete entries in the Authority Record Import: Preferred Cataloging Source table that identifies preferred cataloging sources for imported authority records.
Modify bibliographic deduplication table	System	Allow	Add and delete entries in the Bibliographic Deduplication database table that is used to determine duplicate bibliographic records.
Modify bibliographic record title displays	System	Allow	Access and work with the Title Display Configure dialog boxes for PowerPAC and Mobile PAC. Select bibliographic entities for display in PAC search results views; set display order; edit labels; create and edit entity definitions.
Modify	System	Allow	Add, modify, and

Control Record	Org Levels	Permission	Description
bibliographic tags to retain/delete table			delete entries in the Bibliographic Tags to Retain/Delete table that identifies tags to retain from incoming records when they are imported.
Modify call number hierarchy table	System	Allow	Modify individual entries in the Call Number Hierarchy database table that is used to identify bibliographic tags that contain the call number, and the order in which the tags are checked. All organizations use this table.
Modify circulation status table	System	Allow	Modify individual entries in the Circulation Statuses database table that contains the descriptions that display for standard item circulation statuses.
Modify claim reason table	System	Allow	Add, modify, and delete entries in the Claim Reasons policy table that defines the

Control Record	Org Levels	Permission	Description
			standard reasons a claim is filed with a supplier. All organizations use the same table.
Modify community record title displays	System	Allow	Access and work with the Community Information Display profiles for PowerPAC and Mobile PAC. Select community information entities for display in PAC search results; set the display order; edit entity definitions; and edit labels.
Modify computype label printer commands table	System	Allow	Add or modify Computype label printer commands in the Computype Label Printer Commands database table.
Modify contact persons table	System	Allow	Add, modify, and delete entries in the Contact Persons policy table that contains a list of staff members whose names can be listed on notices

Control Record	Org Levels	Permission	Description
			and reminders. All organizations use the settings in this table.
Modify countries table	System	Allow	Add and modify entries in the Countries policy table that is used to maintain standard postal code formats used in records with addresses. (Postal code format entries cannot be deleted from this table.)
Modify course reserves table	System	Allow	Add, modify, and delete entries in the course reserves policy tables: Courses, Schools/Divisions, Course Reserves, Departments, Course terms
Modify cross reference display constants table	System	Allow	Change individual entries in the Cross Reference Display Constants table that specifies how heading cross-references are displayed for browse searches in the PAC. Entries

Control Record	Org Levels	Permission	Description
			cannot be added or deleted.
Modify currencies table	System	Allow	Add, enable, disable, and delete entries in the Currencies policy table that specifies the currencies (such as US or Canadian dollars) that can be used in Acquisitions records. All organizations use the settings in this table.
Modify dates closed table	System	Allow	Add, modify, and delete entries in the Dates Closed policy table that lists the dates when branches are closed. All organizations use the settings in this table.
Modify did you mean overrides table	System	Allow	Add, modify, and delete entries in the Did You Mean Overrides database table that is used to override suggestions for the Did You Mean function in the PAC.



Control Record	Org Levels	Permission	Description
Modify donation fund category table	System	Allow	Maintain a list of standard donation fund categories in the Fund Categories policy table. All organizations use the settings in this table.
Modify due date modification reasons	System	Allow	Maintain the list of modification reasons that appear in Leap when users reset the due date.
Modify fee descriptions table	System	Allow	Maintain the list of standard fine categories in the Fine Codes policy table. (Entries cannot be deleted from this table.) All organizations use the settings in this table.
Modify fines table	System	Allow	Maintain the fine rates in the Fine policy table. (Entries cannot be deleted from this table.) All organizations use the settings in this table.
Modify floating material type limits	System	Allow	Modify the table that specifies how

Control Record	Org Levels	Permission	Description
table			many floating items of a specific material type a receiving branch will accept.
Modify floating to branch table	System	Allow	Specify the receiving branches for a home branch's floating collections.
Modify genders table	System	Allow	Modify the new Database table, Genders Table.
Modify geographic coordinates table	System	Allow	Specify the latitude and longitude of organizations that should be displayed with the Map It (Google Maps) feature in the PowerPAC.
Modify holds status table	System	Allow	Edit the hold request status descriptions in the Hold Request Statuses database table that controls the hold request status displays in the staff client and PAC patron account.
Modify holds routing sequence	System	Allow	Add, delete, modify and re-order entries

Control Record	Org Levels	Permission	Description
table			in the Holds Routing Sequences policy table that specifies the routing sequences for hold requests.
Modify import blackout times	System	Allow	Use the Cataloging profile, Import Blackout times, to specify the times when importing cannot be done.
Modify initial articles table	System	Allow	Add, modify, and delete entries in the Initial Articles policy table that is used to specify leading articles to ignore in searches.
Modify item availability display order table	System	Allow	Add, modify, delete and re-order entries in the Item Availability Display Order policy table that determines how item availability is displayed in the PAC. All organizations use the settings in this table.
Modify item block descriptions table	System	Allow	Add, modify, and delete entries in the

Control Record	Org Levels	Permission	Description
			Item Block Descriptions database table that lists standard item blocks. All organization use the settings in this table.
Maintain item price hierarchy table	System	Allow	Add, modify, and delete entries in the Item Create Price Hierarchy database table that specifies which fields are checked, and in which order, when copying the price from bibliographic records to their linked item records. Each organization can have its own settings in this table.
Modify item statistical class codes table	System	Allow	Add and modify entries in the Item Statistical Class Codes policy table. All organizations use the settings in this table. (Entries cannot be deleted from this table.)

Control Record	Org Levels	Permission	Description
Modify links to supplier databases	System	Allow	Add, modify, and deleted entries in the Link to Supplier database table that lists the suppliers users can select in Link to Supplier Databases dialog box. All organizations use the settings in this table.
Modify loan periods codes table	System	Allow	Add and modify entries in the Loan Period Codes policy table that defines the descriptions for loan period codes. All organizations use the settings in this table. (Entries cannot be deleted from this table.)
Modify loan periods table	System	Allow	Add and modify entries in the Loan Periods policy table that specifies loan period durations. All organizations use the settings in this table. (Entries cannot be deleted from this table.)

Control Record	Org Levels	Permission	Description
Modify MARC language scoping display table	System	Allow	Add, modify, delete and reorder entries in the MARC Language Scoping Display policy table that specifies the languages available for scoping searches. All organizations use the settings in this table.
Modify material types table	System	Allow	Add, modify, and delete entries in the Material Types policy table that defines the standard list of item material types. All organizations use the settings in this table.
Modify NCIP Fiscal Action Types table	System	Allow	Add, modify, and delete entries in the NCIP Fiscal Action Types table that lists the fiscal action types.
Modify NCIP Medium Types Incoming table	System	Allow	Modify entries in the NCIP Medium Types Incoming policy table that maps NCIP mediums to Polaris

Control Record	Org Levels	Permission	Description
			item material types for incoming requests where the Polaris library is the requester.
Modify NCIP Medium Types Outgoing table	System	Allow	Modify entries in the NCIP Medium Types Outgoing policy table that maps Polaris item material types to NCIP medium types for outgoing requests where the Polairs library is the lender.
Modify NCIP User Privilege Types table	System	Allow	Modify entries in the NCIP User Privilege Types policy table that maps Polaris patron codes to NCIP standard public and/or academic user privilege types.
Modify network domains table	System	Allow	Add, modify, and delete entries in the Network Domains table that is used in multi-domain networks to specify the NetBIOS Name and DNS Name for each domain in the

Control Record	Org Levels	Permission	Description
			network.
Modify notification dates not to call table	System	Allow	Add, modify, delete and reorder entries in the Notification Dates Not to Call table that lists dates when the phone notification server should not make calls.
Modify notification local area codes table	System	Allow	Add, modify, delete and reorder entries in the Notification Local Area codes table that lists the local-call area codes for phone notification purposes.
Modify patron address types table	System	Allow	Maintain the address types list that appears for patron registration in Leap and the staff client.
Modify local prefix table	System	Allow	Add, modify, delete and reorder entries in the Notification Local Prefix table that lists local-call prefixes for phone notification purposes.



Control Record	Org Levels	Permission	Description
Modify SIP Payment Types table	System	Allow	Add, modify, and delete entries in the SIP Payment Types table.
Modify object locks table	System	Allow	Delete entries in the Object Locks database table to remove object locks.
Modify outreach services tables	System	Allow	Add, modify, and delete entries in the outreach services (ORS) policy tables that define options available in the course reserve record workform: Delivery Mode; Delivery Route/Stops; Disability; Equipment; Excluded Circ Statures; Included Branches; Pick List Headers
Modify PAC Community limit by display table	System	Allow	Modify entries in the PAC Community Limit By Display policy table that sets the filters displayed in the Limit by list for PAC Community

Control Record	Org Levels	Permission	Description
			keyword searches. Define and edit custom filters and specify which selection is at the top of the PAC Community keyword Limit by list.
Modify PAC limit by display table	System	Allow	Modify entries in the PAC Limit By Display policy table that sets the filters displayed in the Limit by list for Polaris PowerPAC bibliographic search and Mobile PAC advanced bibliographic search. Define and edit custom filters, and specify which selection is at the top of the PAC Limit By Display policy table.
Modify parameters	System	Allow	Change settings on the Parameters tabbed pages for Polaris Administration records. To limit access to

Control Record	Org Levels	Permission	Description
			parameters at a specific organizational level, use the Branches: Access; Libraries: Access; and System: Access permissions.
Modify patron codes table	System	Allow	Add and modify entries in the Patron Codes policy table that specifies descriptions for patron codes. All organizations use the settings in this table. (Entries cannot be deleted from this table.)
Modify patron statistical class codes table	System	Allow	Add and modify entries in the Patron Statistical Class Codes policy table that specifies that patron statistical classifications used in Circulation reports. (Entries cannot be deleted from this table.)
Modify patron stop descriptions table	System	Allow	Add and modify entries in the Patron Blocks policy table that defines

Control Record	Org Levels	Permission	Description
			standard patron blocks. All organizations use the settings in this table. (Entries cannot be deleted from this table.)
Modify patron/materials type loan limit blocks table	System	Allow	Change the entries in the Patron/Material Type Loan Limit Blocks table. (Entries cannot be added to or deleted from this table.)
Modify payment methods table	System	Allow	Display or suppress payment method options for each branch, and set the display order of the options in the staff client.
Modify preferences	Not used	Do not assign.	
Modify primary display author table	Not used	Do not assign.	
Modify primary display title table	Not used		
Modify product page categories	System	Allow	Access and use the <b>Product page categories:</b> <b>Configure</b> profiles for PowerPAC and

Control Record	Org Levels	Permission	Description
			Mobile PAC to set the content display options for the PAC.
Modify profiles	System	Allow	Change settings on the Profiles tabbed pages for Polaris Administration. To limit access to profiles for a specific organization level, use the Branches: Access; Libraries: Access; or System: Access permissions
Modify search databases table	System	Allow	Add, modify, and delete entries in the Search Databases policy table that identifies the Z39.50 target servers for searching. All organizations use the settings in this table.
Modify selfcheck material types table	System	Allow	Add, modify, and delete entries in the ShelfCheck Material Types policy table that lists material types that can be circulated using a self-check unit. All

Control Record	Org Levels	Permission	Description
			organizations use the settings in this table.
Modify shelf locations table	System	Allow	Add, modify, and delete entries in the Shelf Locations database table that lists the shelf location descriptions available to organizations. All organizations use these settings.
Modify transactions logging table	System	Allow	Change individual entries in the Transaction Logging database table by selecting Yes or No to specify whether a transaction will be recorded in Polaris.
Object/task control record	System	Access; Modify	Access the Security folders and list permissions in the Polaris Find Tool. Modify permission allows the user to: add and remove permission groups, staff, members, workstations, and organizations in the

Control Record	Org Levels	Permission	Description
			Security folders for organizations; add and remove permissions in the Permissions view for these records.
Permission Groups	System	Access; Create; Modify; Delete	Access permission group administration records; search for permission groups in the Find Tool; and open the Permission Group folder. Create new permission groups. Modify permission groups by editing membership and permissions. Delete permission groups
Resource Groups	System	Access; Create; Modify; Delete	Access Resource Groups records that associate organizations with access to remote electronic resources. Create, modify, and delete these resource groups.
Servers	System	Access; Create; Modify; Delete	Access server

Control Record	Org Levels	Permission	Description
			connection records, search for servers with the Find Tool, and open the Servers folder in the Administration Explorer. Create, modify, and delete server connections.
Staff members	System, Library, Branch	Access; Create; Modify; Delete	Access staff member administration records, search for staff members and open the Staff Member folder in the Administration Explorer. Add, modify, and delete staff member records.
System	System	Access; Modify	Access the System folder in the Administration Explorer or search for the system record with the Find Tool. Modify the name, address, and contact information in the System record. Other permissions are required to change



Control Record	Org Levels	Permission	Description
			security and attributes at the System level.
Vendor Account	System	Access; Create; Modify; Delete	Access eContent Vendor Accounts in the Administration Explorer. Create, modify and delete Vendor Account records.
WebAdmin Access	System	Allow	Log in to WebAdmin (Polaris Language Editor), a Web-based utility used to customize language strings.
Workstations	System, Branch	Access; Create; Modify; Delete	Access Workstation records for client computers registered in Polaris; search for workstations in the Find Tool; and open the Workstation folder in the Administration Explorer. Create, modify and delete workstation records.

## Administration Workflow Permissions

This section lists the combinations of permissions needed for specific administration workflows.

**Note:**

For more information about setting permissions in Polaris, see [Permission Strategies](#).

Workflow	Required Permissions	Administration Explorer Security Location
Permissions to Set Permissions		
Authorize others to set permissions	Access administration: Allow	System - System Admin
	Object/task control record: Access	System - System Admin
	Object/task control record: Modify	System - System Admin
	Staff members: Access	System, Library, Branch - System Admin
	System: Access	System - System Admin
	Workstations: Access	System, Branch - System Admin
Maintain security for a library. These permissions are required to allow individuals to set local permissions.	Access administration: Allow	System - System Admin
	Object/task control record: Access	System - System Admin
	Object/task control record:	System - System

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
	Modify	Admin
	Libraries: Access	System - System Admin
	Branches: Access	System - System Admin
	Groups: Access	System - System Admin
	Staff members: Access	System, Library, Branch - System Admin
	Workstations: Access	System, Library, Branch - System Admin
Maintain permissions for groups, staff members, and workstations	Access administration: Allow	System - System Admin
	Object/task control record: Access	System - System Admin
	Object/task control record: Modify	System - System Admin
	Permission Groups: Access	System - System Admin
	Staff members: Access	System, Library, Branch - System Admin
	Workstations: Access	System, Library, Branch - System

Workflow	Required Permissions	Administration Explorer Security Location
		Admin
Organization Maintenance Permissions		
Create new organizations	Access administration: Allow	System - System Admin
	Branches: Access	System - System Admin
	Branches: Create	System - System Admin
	Libraries: Access	System - System Admin
	Libraries: Create	System - System Admin
Maintain resource groups	Access administration: Allow	System - System Admin
	Resource Group: Access	System - System Admin
	Resource Group: Create	System - System Admin
	Resource Group: Delete	System - System Admin
	Resource Group: Modify	System - System Admin
Maintain system organizational information	Access administration: Allow	System - System Admin
	Modify parameters: Allow	System - System Admin

Workflow	Required Permissions	Administration Explorer Security Location
	Modify profiles: Allow	System - System Admin
	System: Access	System - System Admin
	System: Modify	System - System Admin
Administer system-wide address and contact information (add these permissions to the system maintenance permissions). These permissions can be added to library-level and branch-level administration permissions, but any changes apply to the entire system.	Access tables: Allow	System - System Admin
	Modify address table: Allow	System - System Admin
	Modify contact persons table: Allow	System - System Admin
	Modify countries table: Allow	System - System Admin
	Modify dates closed table: Allow	System - System Admin
	Modify postal codes table: Allow	System - System Admin
Administer record operations and transactions (add these permissions to the system maintenance permissions). These permissions can be added to library-level and branch-level administration permissions.	Access tables: Allow	System - System Admin
	Modify object locks table: Allow	System - System Admin
	Modify transaction logging table: Allow	System - System Admin

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
Maintain and change organizational information	Access administration: Allow	System - System Admin
	Branches: Access	System - System Admin
	Branches: Modify	System - System Admin
	Libraries: Access	System - System Admin
	Libraries: Modify	System - System Admin
Maintain organizational parameters and profiles	Access administration: Allow	System - System Admin
	Branches: Access	System - System Admin
	Libraries: Access	System - System Admin
	Modify parameters: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
Administer collections	Access administration: Allow	System - System Admin
	Collections: Access	System - System Admin
	Collections: Create	System - System Admin

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
	Collections: Delete	System - System Admin
	Collections: Modify	System - System Admin
Administer servers	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify search databases table: Allow	System - System Admin
	Servers: Access	System - System Admin
	Servers: Modify	System - System Admin
	Servers: Create	System - System Admin
	Servers: Delete	System - System Admin
Permission Group, Workstation, Staff Member Record Permissions		
Administer staff members	Access administration: Allow	System - System Admin
	Modify parameters: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
	Staff members: Access	System, Library, Branch - System Admin
	Staff members: Create	System, Library, Branch -System Admin
	Staff members: Modify	System, Library, Branch -System Admin
	Staff members: Delete	System, Library, Branch -System Admin
Administer permission groups. Access to Libraries and Branches can be added to administer permission groups.	Access administration: Allow	System - System Admin
	Permission Groups: Access	System - System Admin
	Permission Groups: Create	System - System Admin
	Permission Groups: Modify	System - System Admin
	Permission Groups: Delete	System - System Admin
	Staff members: Access	System, Library, Branch - System Admin
	Workstations: Access	System, Library, Branch - System



<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
		Admin
Administer workstations	Access administration: Allow	System - System Admin
	Modify parameters: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
	Workstations: Access	System, Library, Branch - System Admin
	Workstations: Create	System, Library, Branch - System Admin
	Workstations: Modify	System, Library, Branch - System Admin
	Workstations: Delete	System, Library, Branch - System Admin
<b>Cataloging Administration Permissions</b>		
Set automatic bib and authority re-indexing during next server upgrade	Access MARC Re-index during next server upgrade: Allow	System - System Admin
Set MARC validation rules and policies	Access administration: Allow	System - System Admin

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
	Modify profiles: Allow	System - System Admin
	Access MARC Validation: Authority: Allow	System - System Admin
	Access MARC Validation: Bibliographic: Allow	System - System Admin
	MARC Validation: Authority - insert row: Allow	System - System Admin
	MARC Validation: Authority - modify row: Allow	System - System Admin
	MARC Validation: Authority - delete row: Allow	System - System Admin
	MARC Validation: Bibliographic - insert row: Allow	System - System Admin
	MARC Validation: Bibliographic - modify row: Allow	System - System Admin
	MARC Validation: Bibliographic - delete row: Allow	System - System Admin
Set duplicate catalog record detection criteria	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify bibliographic	System - System

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
	deduplication table: Allow	Admin
	Modify bibliographic tags to retain/delete tables: Allow	System - System Admin
	Modify authority overlay retention table: Allow	System - System Admin
	Modify authority record import: preferred cataloging source: Allow	System - System Admin
Set miscellaneous catalog record policies	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify call number hierarchy table: Allow	System - System Admin
	Modify item price hierarchy table: Allow	System - System Admin
	Modify item block descriptions table: Allow	System - System Admin
	Modify initial articles table: Allow	System - System Admin
	Modify import blackout times	System - System Admin
Set label configuration profiles	Access administration: Allow	System - System Admin
	Modify profiles: Allow	System - System

Workflow	Required Permissions	Administration Explorer Security Location
	<p>You may limit access to a subset of these levels:</p> <p>Branches: Access</p> <p>Libraries: Access</p> <p>System: Access</p> <p>Workstations: Access</p> <p>Staff members: Access</p>	<p>Admin</p> <p>Various levels - System Admin</p>
Circulation Administration Permissions		
<p>Set up circulation codes and labels (add these permissions to the system maintenance permissions). These permissions can be added to library and branch level administration permissions, but any changes apply to the entire system.</p>	Access tables: Allow	System - System Admin
	Modify circulation status table	System - System Admin
	Modify claim reason table: Allow	System - System Admin
	Modify fee descriptions table: Allow	System - System Admin
	Modify fine codes table: Allow	System - System Admin
	Modify hold status table: Allow	System - System Admin
	Modify item block descriptions table: Allow	System - System Admin
	Modify patron codes table: Allow	System - System Admin

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
	Modify patron stop descriptions table: Allow	System - System Admin
	Modify material types table: Allow	System - System Admin
	Modify loan period codes table: Allow	System - System Admin
	Modify patron statistical class codes table: Allow	System - System Admin
	Modify NCIP User Privilege Types table: Allow	System - System Admin
Maintain circulation limits, rates, and schedules (add these permissions to the system maintenance permissions). These permissions can be added to library and branch level administration permissions.	Access tables: Allow	System - System Admin
	Modify fines table: Allow	System - System Admin
	Modify loan periods table: Allow	System - System Admin
	Modify patron/materials type loan limit blocks table: Allow	System - System Admin
	Modify payment methods table: Allow	System - System Admin
Set policies for floating collections	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify floating material	System - System

Workflow	Required Permissions	Administration Explorer Security Location
	type limits table: Allow	Admin
	Modify floating material types table: Allow	System - System Admin
	Modify floating to branch table: Allow	System - System Admin
Maintain self-check attributes	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify self check material types table: Allow	System - System Admin
	System: Access	System - System Admin
Maintain notice settings	Access administration: Allow	System - System Admin
	Access reports and notices: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
	Modify notification dates not to call table: Allow	System - System Admin
	Modify notification local area codes table: Allow	System - System Admin

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
	Modify notification local prefix table: Allow	System - System Admin
	System: Access	System - System Admin
Maintain hold request routing schedule	Access administration: Allow	System - System Admin
	System: Access	System - System Admin
	Access tables: Allow	System - System Admin
	Modify holds routing sequence table: Allow	System - System Admin
Edit hold request status descriptions	Access administration: Allow	System - System Admin
	System: Access	System - System Admin
	Access tables: Allow	System - System Admin
	Modify hold status table: Allow	System - System Admin
Set up and maintain course reserve functions	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify course reserve tables: Allow	System - System Admin

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
	Modify parameters: Allow	System - System Admin
Specify mobile phone service carriers for selection in the Patron Registration workform and when patrons register or update their account information from the PAC	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify mobile phone carriers: Allow	System - System Admin
Set up and maintain outreach service functions	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify outreach services tables: Allow	System - System Admin
	Modify parameters: Allow	System - System Admin
Administer NCIP - Map data to Polaris data and set parameters	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify NCIP medium types incoming table: Allow	System - System Admin
	Modify NCIP medium types outgoing table: Allow	System - System Admin
	Modify NCIP user privilege	System - System



<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
	types table: Allow	Admin
	Modify NCIP Payment Types table: Allow	System - System Admin
	Modify NCIP Fiscal Action Types table: Allow	System - System Admin
	Modify SIP Payment Types table: Allow	System - System Admin
<b>Public Access Administration Permissions</b>		
Maintain catalog results settings	Access administration: Allow	System - System Admin
	System: Access	System - System Admin
	Access tables: Allow	System - System Admin
	Modify shelf locations table: Allow	System - System Admin
	Modify cross reference display constants table: Allow	System - System Admin
	Modify item availability display order table: Allow	System - System Admin
Maintain catalog search settings	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
	Modify search databases table: Allow	System - System Admin
	System: Access	System - System Admin
Set up and modify override phrases for Did You Mean search suggestions in the PAC	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify did you mean overrides table: Allow	System - System Admin
Set up PAC displays for bibliographic and community information searches and search results	Access administration: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
	Modify bibliographic record title displays: Allow	System - System Admin
	Modify community record title displays: Allow	System - System Admin
	Modify and create display entities: Allow	System - System Admin
	Modify product page categories: Allow	System - System Admin
	Modify PAC limit by display table: allow	System - System Admin
	Modify PAC community limit by display table: allow	System - System Admin

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
	System: Access	System - System Admin
Enter or edit geographic coordinates for organizations that might be displayed with the Map It (Google Maps) feature in Polaris PowerPAC	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify geographic coordinates table: Allow	System - System Admin
	System: Access	System - System Admin
<b>Acquisitions Administration Permissions</b>		
Maintain acquisitions settings	Access administration: Allow	System - System Admin
	Access tables: Allow	System - System Admin
	Modify links to supplier databases: Allow	System - System Admin
	Modify donation fund category table: Allow	System - System Admin
	Modify currencies table: Allow	System - System Admin
	System: Access	System - System Admin

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
<b>Serials Administration Permissions</b>		
Set parameters and profiles related to Serials	Access administration: Allow	System - System Admin
	Modify parameters: Allow	System - System Admin
	Modify profiles: Allow	System - System Admin
	System: Access	System - System Admin
<b>WebAdmin Permissions</b>		
Use Polaris Language Editor (Web Admin) to customize language strings for Polaris products	WebAdmin access: Allow	System - System Admin

## Circulation Permissions Reference

These permissions are available under **Security > Circulation** at the listed organizational levels on the Administration Explorer. They control the ability to perform patron services and circulation tasks.

Control Record	Org Levels	Permissions	Description
Access bookmobile	System	Allow	Open the Bookmobile workform. This workform is used to select and upload offline transaction files. User can retrieve transaction files created during offline operations.
Access circulation control	System	Allow	Open the Circulation menu on the Polaris Shortcut Bar. Check in materials, check-out materials, process holds or ILL requests, and accept fee and fine payments.
Access Credit Card Payments Manager	System	Allow	Open the Credit Cards Payment Manager from the Utilities menu on the Polaris Shortcut Bar. Work with the Credit Card Payments Manager.
Access hold request manager	Branch	Allow	Open and use the Holds view on the Request Manager workform to process and manage hold requests.
Access ILL request manager	Branch	Allow	Open and use the ILL view on the Request Manager

Control Record	Org Levels	Permissions	Description
			workform to process and manage interlibrary loan requests.
Access notice history	Branch	Allow	Open the Notice History dialog box from the Polaris Status workform and view the notice history for a specific item.
Access patron record bulk change	System	Allow	Use the Bulk Change option on the Record Set workform, Tools menu to change multiple patron records. To change records for a specific Registered at branch, the user also needs the permission <b>Patron registration: Modify for that branch.</b>
Access patron services	System	Allow	Open the Patron Services menu on the Polaris Shortcut Bar to register patrons and manage patron records/services.
Circulation check-in workform	System	Access Bulk Mode; Access In-house mode; Access Inventory mode; Access Normal mode	Access specific views of the Check-in workform to: do bulk check-ins; check in items that were used in the library but did not circulate outside of the library; check in items in normal mode at the circulation desk; and take

Control Record	Org Levels	Permissions	Description
			item inventory.
Close ExpressCheck	System	Allow	Exit the Polaris ExpressCheck application at a self-check workstation.
Create a patron account credit	System	Allow	Accept overpayments from patrons and post credits to patron accounts.
Create on-the fly records	System	Allow	Create brief records that enable an item to circulate.
Create patron associations	System	Allow	Open the Associations view on the Patron Status workform, and add patron associations.
Create, return or forfeit a patron account deposit	System	Allow	Work with deposits in the Patron Status workform, Account view
Delete patron associations	System	Allow	Use the Delete option in the Associations view of the Patron Status workform to remove the links between patron records.
Delete patron message	System	Allow	Remove a posted message from a patron record.
Delete photo IDs	System	Allow	Delete a patron photo from the Patron Photo view of the Patron

Control Record	Org Levels	Permissions	Description
			Registration workform.
Display hold-request queues	System	Allow	Display the Holds Queue workform; process hold requests at any branch.
Fines: Allow credit card payments	System	Allow	Select Credit Card as payment method and input credit card information when a credit card is used to pay a fine or fee.
Fines: Allow refunds	System	Allow	Refund one or all payments from the Patron Status or Store Order workform.
Fines: override 2nd level fine block	System	Allow	Override a second-level fine block to allow patrons to check out.
Fines: pay fines at circ	System	Allow	Select Pay on the Fines Block dialog box to pay a patron's fines during check-out, renewal, or check-in.
Fines: waive fines at circ	System	Allow	Select Waive on the Fines Block dialog box to waive a patron's fines during check-out.
Hold requests	Branch	Access; Ask me later; Create; Delete; Deny item request; Locate/Return; Modify; Modify	Each branch that processes hold requests assigns permissions for staff members to manage holds for their branch.



Control Record	Org Levels	Permissions	Description
		PAC display note; Reactivate request	Staff members who have the permission <b>Modify PAC display note</b> can change the note that displays for held items in the PAC.
ILL requests	Branch	Access; Delete; Modify; Convert holds	Each branch that handles interlibrary loan requests assigns permissions for staff members who manage ILL requests. Staff members with the permission <b>Convert holds</b> can convert a hold request to an ILL request.
Manage item dialogs	System, Library, Branch	Modify assigned collection; Modify barcode; Modify blocks; Modify circulation status; Modify material type; Modify notes; Modify shelf location; Withdraw items	Change specific aspects of selected item records from the Check-in workform, without accessing the records. The items must have a status of In and belong to the branch associated with the logged-in workstation.
Merge patrons	System	Allow	Use the Patron Merge dialog box, available from the Tools menu on the Patron Registration workform to merge information from the secondary patron into the primary patron's record, and delete the secondary

Control Record	Org Levels	Permissions	Description
			record.
Modify due date and time	System	Allow	Select Special on the Check Out workform, and use the Special Loan dialog box to set a special due date and time during check-out.
Modify fine amount	System	Allow	Change the fine amount in the Overdue Fine dialog box when an overdue item is checked in or renewed.
Modify free days	System	Allow	Type a new number of days in the Free days box on the Check In workform to change the default number of free days (days exempt from overdue fines) when an item is checked in.
Modify hold queues	System	Allow	Change the position of holds on the Holds Queue workform.
Modify lost item amount	System	Allow	Change the amount of the replacement charge or processing fee in the Declare Lost Item dialog box when declaring an item lost.
Modify ORS patron ratings	System, Library, Branch	Allow	Select items from the Patron Status workform, Reader Services view and

Control Record	Org Levels	Permissions	Description
			add or modify the patron's ratings, including notes.
Modify photo IDs	System	Allow	On the Patron Registration workform, Patron Photo view, add or replace a patron photo.
Modify receipt message text	System	Allow	Edit and save the message text on the Circulation, Options, Receipt Printer Options tabbed page.
Modify renewal period	System	Allow	Select Special Renew on the Items Out view of the Patron Status workform to set a special renewal loan period for a checked-out item.
ORS: Link from bibliographic record	System	Allow	Select <b>Links, Outreach Patrons</b> in the Bibliographic Record workform or right-click a bibliographic record in the Find Tool results list, and select Links, Outreach Patrons to display the list of linked patrons whose reading histories include items linked to the bibliographic record. (Outreach Services must also be licensed for the staff member's logged-in

Control Record	Org Levels	Permissions	Description
			workstation.)
Outreach Services Manager	Branch	Access	Open the Outreach Services Manager workform and process outreach services for multiple patrons.
Override associated patron block	System	Allow	Continue a checkout or renewal for a patron whose associated patrons are blocked. Both this permission and the permission to override the specific block are required to continue a checkout.
Override claimed item limits	System	Allow	Continue a checkout, continue a renewal, and add new claims for a patron who has exceeded the current or total claimed items limit.
Override collection agency block	System		Continue a checkout or renewal for a patron who is blocked because their account has been referred to a collection agency.
Override invalid patron barcode message	System	Allow	Continue to save a patron record when an invalid barcode message is displayed.
Override item	System	Allow	Continue a checkout or

Control Record	Org Levels	Permissions	Description
assigned blocks			renewal when the item has library-assigned blocks.
Override item free-text blocks	System	Allow	Continue a checkout or renewal when the item has a free-text block.
Override item limit blocks	System	Allow	Continue a checkout or renewal when the item exceeds the items out limits have been reached for: material type, total items out, or reserve items out.
Override non-circulating blocks	System	Allow	Continue a checkout or renewal when the item is non-circulating; when the material type limit for that patron code is set to 0 in the Patron Material Type Loan Limits policy table; or when the loan period is set to 0 in the Loan Periods policy table.
Override overdue limit	System	Allow	Continue a checkout or renewal operation for a patron who has exceeded the limit for overdue or long overdue items.
Override patron assigned blocks	System	Allow	Continue a checkout or renewal for a patron who has a library-assigned block on their patron record.

Control Record	Org Levels	Permissions	Description
Override patron free-text blocks	System	Allow	Continue a checkout or renewal for a patron with a free-text block on the patron record.
Override renewal limit blocks	System	Allow	Continue a checkout or renewal for a patron with free-text block on the patron record
Override request blocks	System	Allow	Continue to create a hold request when a patron or item block occurs.
Override request limits	System	Allow	Continue to create a hold request when a message blocks the request because the patron exceeded the request limit.
Patron claims: Reset total claim count	System	Allow	On the Patron Status workform - Claims view, reset a patron's total (lifetime) claims to 0.
Patron record sets	System, Library, Branch	Access; Create; Delete/Undelete; Export; Modify	<p>Each organization that owns patron record sets assigns permissions to the staff members who work with patron record sets belonging to that organization.</p> <p>The Export permission lets you export patron record sets from Leap to Excel.</p>

Control Record	Org Levels	Permissions	Description
			<p><b>Note:</b> You can only export record sets owned at the System, Library, or Branch level. Record sets owned by individuals cannot be exported.</p>
Patron registration	Branch	<p>Access; Create; Create express registration record; Delete; Modify; Modify postal address fields; Override blocks to delete</p>	<p>Each branch assigns permissions for staff members to access the Patron Registration workflow, edit the information, and delete patron registration records for patrons registered at that branch. The <b>Modify postal address fields</b> permission allows staff members to enter a city/state/county/postal code combination that does not already exist in the postal codes table. (The new combination is added to the table when the records saved.)</p>
Patron status	Branch	<p>Access; Access notice history; Access patron account; Access patron account: Transaction</p>	<p>Each branch assigns permissions for staff members to access account information for patrons registered at that branch.</p> <p>Access permissions allow staff members to access</p>

Control Record	Org Levels	Permissions	Description
		<p>summary</p> <p>Bill a charge manually</p> <p>Create/delete patron blocks;</p> <p>Display associations; Display claimed items; Display hold request list; Display items checked-out; Display notes; Display patron blocks; Display reader services;</p> <p>Modify notes; Modify patron account; Modify reader services</p> <p>Patron record: Release; Patron record: Secure</p>	<p>all patron status (account) information or specific patron account views.</p> <p>Bill a charge manually allows users with this permission in addition to Access and Modify patron account permissions, to bill a charge manually.</p> <p>Display permissions indicate the patron status information that is displayed.</p> <p>Modify permissions allow staff to change information in the patron's account.</p> <p>Patron record secure and release permissions allow staff to secure a patron record to prevent check outs and other library activity, and then release the record to resume library activity.</p>



Control Record	Org Levels	Permissions	Description
Picklist application	System, Branch	Allow  Modify circulation status	Use the Picklist in the Polaris Web App (Leap).  Modify an item's circulation status from the Picklist in the Polaris Web App (Leap)
Post patron message	System	Allow	Use the Add message and Modify message options in the Notes view of the Patron Status workflow to add a message that the patron can read and delete from their patron account in the PAC.
Reading history: Remove non-ORS patron history entries	System, Library, Branch	Allow	Select and remove individual items from the Reading History list on the Patron Status workflow, Reader Services view. The Patron Status: Modify reader services is also required.
Reading history: Remove ORS patron history entries	System, Library, Branch	Allow	Select and remove individual items from an outreach services patron's reading history. The Patron Status: Modify reader services is also

Control Record	Org Levels	Permissions	Description
			required.
Remove collection agency block	System	Allow	Select and remove specific charges for a patron from collection agency reporting.
Renew items	System	Allow	Renew items
Renew items with holds	System	Allow	Renew items with hold requests
Renew overdue items	System	Allow	Renew items that are overdue
Reset due date	System	Allow	Reset the due date of checked out items
Special item check in	System, Library, Branch	Access; Select missing part; Select unavailable	A staff member with these permissions can use the Special Item Check-In dialog box to check in multi-part items that are missing a part or parts.
Suppress warnings for breakable links when deleting multiple patron records	System	Allow	A staff member with this permission can uncheck the <b>Warn me about breakable links</b> box when deleting multiple patron records so that these warnings do not appear for each record that has breakable links.
Suppress warnings for unbreakable links,	System	Allow	A staff member with this permission can uncheck the <b>Warn me about</b>

Control Record	Org Levels	Permissions	Description
and other stopping conditions, when deleting multiple patron records			<b>unbreakable links and other stopping conditions</b> box when deleting multiple patron records so that these warnings do not appear for each record that has unbreakable links.
Use 'own' patron record sets	System	Allow	Create and maintain patron record sets owned by an individual staff member or group.

### Circulation and Patron Services Workflow Permissions

This section lists the combinations of permissions needed to do common circulation and patron services workflows. For a staff member to do a task at a particular workstation, both the staff member and the workstation need the appropriate permissions.

**Note:**  
 For an alphabetical list of all circulation permissions, see [Circulation Permissions List](#). For more information about setting permissions in Polaris, see the Polaris Administration PDF Guide, Granting Permissions.

Workflow	Required Permissions	Administration Explorer Security Location
<b>Checking Out and Renewing</b>		
Check out and renew materials - minimum	Access circulation control: Allow Patron registration: Access Renew items: Allow	System - Circulation Branch - Circulation System - Circulation Branch - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
	Item records: Access	
Modify a fine amount for a specific overdue item during renewal	Modify fine amount: Allow	System - Circulation
Renew items from patron account	Patron status: Modify patron account Renew items: Allow Renew overdue items: Allow	Branch - Circulation System - Circulation System - Circulation
Renew items that fill hold requests	Renew items: Allow Renew items with holds: Allow	System - Circulation System - Circulation
Override a circ block to check out an item to a patron who has a blocked associated patron record	Override associated patron block: Allow  The staff member must also have permission to override the specific block on the associated patron record.	System - Circulation
Override a circ block to check out an item, renew an item, or enter a new claim for a patron who has exceeded the current claims or total claimed items limit	Override claimed item limits: Allow	System - Circulation
Override a circ block to check out an item that has library-assigned blocks	Override item assigned blocks: Allow	System - Circulation
Override a circ block to check out an item that	Override item free-text blocks: Allow	System - Circulation

Workflow	Required Permissions	Administration Explorer Security Location
has a free-text block		
Override a circ block to check out an item that exceeds the limit for items out by material type, total items out, material type group, or reserve items out	Override item limit blocks: Allow	System - Circulation
Override a circ block to check out an item to a patron who has exceeded the limit for overdue or long overdue items	Override overdue limit: Allow	System - Circulation
Override a circ block to check out an item to a patron with library-assigned blocks	Override patron assigned blocks: Allow	System - Circulation
Override a circ block to check out an item to a patron with a blocking note	Override patron blocking note: Allow	System - Circulation
Override a circ block to check out an item to a patron with a free-text block	Override patron free-text blocks: Allow	System - Circulation
Override a circ block to check out an item to a patron who has exceeded the total request limit, a request limit by material type, or	Override request limits: Allow	System - Circulation

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
the ILL request limit		
Override second-level fine block during checkout	Fines: override 2nd level fine block: Allow	System - Circulation
Override renewal blocks	Renew overdue items: Allow Override renewal limit blocks: Allow	System - Circulation System - Circulation
Override block if patron's account is in collection	Override collection agency block: Allow	System - Circulation
Create or delete patron blocks during checkout	Patron status: Create/delete patron blocks	Branch - Circulation
Express-register a patron during checkout	Patron registration: Create express registration record	Branch - Circulation
Override blocks during checkout for items pending in the hold queue	Override request blocks: Allow	System - Circulation
Override blocks during checkout for items that do not circulate	Override non-circulating blocks: Allow	System - Circulation
Do express cataloging during checkout for items not found in the database	Create on-the-fly records: Allow	System - Circulation
Set special loan periods during checkout	Modify due date and time: Allow	System - Circulation
Set special loan periods for a renewal	Modify renewal period: Allow Patron status: Access	System - Circulation Branch - Circulation

Workflow	Required Permissions	Administration Explorer Security Location
	Patron status: Display items checked-out Patron status: Modify patron account	Branch - Circulation Branch - Circulation
Set a new due date for items already checked out	Reset due date: Allow	System - Circulation
Customize the message text on checkout receipts	Modify receipt message text: Allow	System - Circulation
<b>Receiving Payments</b>		
Receive payments for fines and fees	Create a patron account credit: Allow Fines: pay fines at circ: Allow Fines: waive fines at circ: Allow Patron status: Access Patron status: Access patron account Patron status: Access patron account: transaction summary Patron status: Modify patron account	System - Circulation System - Circulation System - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation
Receive credit card payments, issue refunds to credit card accounts	Fines: Allow credit card payments Fines: Allow refunds Access Credit Card Payments Manager: Allow	System - Circulation System - Circulation System - Circulation

Workflow	Required Permissions	Administration Explorer Security Location
<b>Checking In Items</b>		
Check in materials at the circulation desk	Access circulation control: Allow Circulation check in workform: Access Normal mode	System - Circulation System - Circulation
Check in materials from the book drop	Access circulation control: Allow Circulation check in workform: Access Bulk mode	System - Circulation System - Circulation
Change the default number of free days at normal, bulk, or offline check-in	Access circulation control: Allow Modify free days: Allow	System - Circulation System - Circulation
Change the collection of a checked in item from the Check In workform	Access circulation control: Allow Manage item dialogs: Modify assigned collection	System - Circulation System, Library, Branch - Circulation
Change the barcode of a checked in item from the Check In workform	Access circulation control: Allow Manage item dialogs: Modify barcode	System - Circulation System, Library, Branch - Circulation
Change a library-assigned or free-text block of a checked in item from the Check In workform	Access circulation control: Allow Manage item dialogs: Modify blocks	System - Circulation System, Library, Branch - Circulation
Change the circulation status of a checked in	Access circulation control: Allow	System - Circulation



Workflow	Required Permissions	Administration Explorer Security Location
item (from In to In-repair, Unavailable, or Bindery) from the Check In workflow	Manage item dialogs: Modify circulation status	System, Library, Branch - Circulation
Change the material type of a checked in item from the Check In workflow	Access circulation control: Allow Manage item dialogs: Modify material type	System - Circulation System, Library, Branch - Circulation
Change the non-public note of a checked in item from the Check In workflow	Access circulation control: Allow Manage item dialogs: Modify notes	System - Circulation System, Library, Branch - Circulation
Change the shelf location of a checked in item from the Check In workflow	Access circulation control: Allow Manage item dialogs: Modify shelf location	System - Circulation System, Library, Branch - Circulation
Change the circulation status of a checked in item (from In to Withdrawn) from the Check In workflow	Access circulation control: Allow Manage item dialogs: Withdraw items	System - Circulation System, Library, Branch - Circulation
Check in materials that have been used in the library	Access circulation control: Allow Circulation check in workflow: Access In-House mode	System - Circulation System - Circulation
Take an item inventory	Access circulation control: Allow Circulation check in workflow: Access Inventory mode	System - Circulation System - Circulation

Workflow	Required Permissions	Administration Explorer Security Location
<b>Receiving and Checking In Shelf-Ready Acquisitions Items</b>		
Check in new shelf-ready materials at the loading dock	Access Acquisitions: Allow Check in shelf-ready materials: Allow	System - Acquisitions System - Acquisitions
<b>Circulating Ephemeral Items (Polaris Quick-Circ)</b>		
Work with quick-circ item records	Quick-circ item records: Access Quick-circ item records: Create Quick-circ item records: Delete Quick-circ item records: Modify	Branch - Cataloging Branch - Cataloging Branch - Cataloging Branch - Cataloging
<b>Working with Patron Records</b>		
Answer questions from patrons about their accounts; work with deposits	Access patron services: Allow Create, return or forfeit a patron account deposit Patron status: Access Patron status: Access notice history Patron status: Access patron account Patron status: Display associations Patron status: Display claimed items Patron status: Display hold request list Patron status: Display items checked-out	System - Circulation System - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation

Workflow	Required Permissions	Administration Explorer Security Location
	Patron status: Display notes Patron status: Display patron blocks Patron status: Display reader services (reading histories and Outreach Services)	
Add a charge or select an existing charge and bill the patron	Access patron services: Allow Patron status: Access Patron status: Access notice history Patron status: Access patron account Bill a charge manually	Branch Staff member Workstation
Register patrons	Access patron services: Allow Create patron associations: Allow Patron registration: Access Patron registration: Create Override invalid patron barcode message: Allow Patron registration: Create express registration record Patron registration: Modify Patron registration: Modify postal address fields Note:	System - Circulation System - Circulation Branch - Circulation Branch - Circulation System - Circulation Branch - Circulation Branch - Circulation Branch - Circulation

Workflow	Required Permissions	Administration Explorer Security Location
	<p>With this permission, you can enter a postal code/city/state/country combination in the patron record that does not already exist in the system postal code table. When the record is saved, the new combination is added to the system postal code table. Without this permission, you can edit only the street address or select an existing combination.</p>	
<p>Maintain patron registration records</p>	<p>Access circulation control: Allow</p> <p>Access patron record bulk change: Allow</p> <p>Access patron services: Allow</p> <p>Create patron associations: Allow</p> <p>Delete patron associations: Allow</p> <p>Merge patrons: Allow</p> <p>Patron record sets: Access</p> <p>Patron record sets: Create</p> <p>Patron record sets: Delete/Undelete</p> <p>Patron record sets: Export</p> <p>Patron record sets: Modify</p> <p>Patron registration: Access</p>	<p>System - Circulation</p> <p>System - Circulation</p> <p>System - Circulation</p> <p>System - Circulation</p> <p>System - Circulation</p> <p>System - Circulation</p> <p>System, Library, Branch - Circulation</p> <p>System, Library, Branch - Circulation</p> <p>System, Library, Branch - Circulation</p> <p>System, Library, Branch - Circulation</p> <p>Branch - Circulation</p> <p>Branch - Circulation</p>

Workflow	Required Permissions	Administration Explorer Security Location
	<p>Patron registration: Delete</p> <p>Patron registration: Modify (also needed to bulk-change patron records for an organization)</p> <p>Patron status: Access</p> <p>Patron status: Display associations</p> <p>Patron status: Display reader services (reading histories and Outreach Services)</p> <p>Patron status: Modify notes</p> <p>Patron status: Modify patron account</p> <p>Reading history: Remove non-ORS patron history entries: Allow (remove individual items from reading history) This permission is also required: Patron Status: Modify reader services.</p> <p>Reading history: Remove ORS patron history entries: Allow (remove individual items from reading history) This permission is also required: Patron Status: Modify reader services.</p> <p>Use 'own' patron record sets: Allow</p> <p>Post patron message</p>	<p>Branch - Circulation</p> <p>Branch - Circulation</p> <p>Branch - Circulation</p> <p>Branch - Circulation</p> <p>Branch - Circulation</p> <p>Branch - Circulation</p> <p>System, Library, Branch - Circulation</p> <p>System, Library, Branch - Circulation</p> <p>System - Circulation</p> <p>System - Circulation</p> <p>System - Circulation</p> <p>System - Circulation</p> <p>System - Circulation</p>

Workflow	Required Permissions	Administration Explorer Security Location
	Delete patron message Modify photo IDs: Allow (licensed feature) Delete photo IDs: Allow (licensed feature)	
Suppress warning messages when deleting multiple patron records	Suppress warnings for unbreakable links, and other stopping conditions, when deleting multiple patron records: Allow Suppress warnings for breakable links when deleting multiple patron records: Allow	System - Circulation System - Circulation
Override the blocks that prevent deleting patron registration records	Patron registration: Override blocks to delete	Branch - Circulation
Alter replacement and processing fees when declaring an item lost	Modify lost item amount: Allow	System - Circulation
Working with Hold and ILL Requests		
Generate hold and interlibrary loan requests for a patron	Hold requests: Create ILL requests: Convert holds Patron status: Access Bibliographic Records: Access Item Records: Access	Branch - Circulation Branch - Circulation Branch - Circulation System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Cancel a hold or interlibrary loan request	Patron status: Access	Branch - Circulation

Workflow	Required Permissions	Administration Explorer Security Location
from the Patron Status workform	Patron status: Display hold request list Patron status: Modify patron account Bibliographic Records - Access Item Records - Access	Branch - Circulation Branch - Circulation System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Manage hold requests	Access circulation control: Allow Access hold request manager: Allow Display hold-request queues: Allow Modify hold queues: Allow Hold requests: Modify PAC display note Hold requests: Access Hold requests: Delete Hold requests: Deny item request Hold requests: Modify ILL requests: Convert holds Patron registration: Access Patron status: Access Patron status: Display hold request list Bibliographic Records: Access Item Records: Access	System - Circulation System - Circulation System - Circulation System - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation System, Library, Branch - Cataloging System, Library, Branch - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
Managing interlibrary loan requests	Access circulation control: Allow Access ILL request manager: Allow ILL requests: Access ILL requests: Create ILL requests: Delete ILL requests: Modify Patron registration: Access Patron status: Access Patron status: Display hold request list Bibliographic Records: Access Item Records : Access	System - Circulation System - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation System, Library, Branch - Cataloging System, Library, Branch - Cataloging
<b>Working with Course Reserves</b>		
Designate instructors for course reserve records	Patron registration: Access Patron registration: Create Patron registration: Delete Patron registration: Modify	Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation
Create and manage course reserve records	Auto delete processing of reserve item records: Allow (for deleting temporary item and bibliographic records when a “disposable” or instructor-owned item is taken off reserve) Course reserve records: Access Course reserve records: Create	System- Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging



Workflow	Required Permissions	Administration Explorer Security Location
	Course reserve records: Delete	System, Library, Branch - Cataloging
	Course reserve records: Modify	System, Library, Branch - Cataloging
	Course reserve templates: Access	System, Library, Branch - Cataloging
	Course reserve templates: Create	System, Library, Branch - Cataloging
	Course reserve templates: Delete	System, Library, Branch - Cataloging
	Course reserve templates: Modify	System, Library, Branch - Cataloging
	Item records: Access	System, Library, Branch - Cataloging
	Item records: Create	System, Library, Branch - Cataloging
	Item records: Delete	System, Library, Branch - Cataloging
	Item records: Modify reserves view	System, Library, Branch - Cataloging
	Item templates: Access	System, Library, Branch - Cataloging
	Item templates: Create	System, Library, Branch - Cataloging
	Item templates: Delete	System, Library, Branch - Cataloging
	Reserve item templates: Access	System, Library, Branch - Cataloging
	Reserve item templates: Create	System, Library, Branch - Cataloging
	Reserve item templates: Delete	System, Library, Branch - Cataloging
	Reserve item templates: Modify	System, Library, Branch - Cataloging
	Bibliographic records: Create (for on-the-fly items)	System, Library, Branch - Cataloging
		System, Library, Branch -

Workflow	Required Permissions	Administration Explorer Security Location
		Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
<b>Working with Outreach Services</b>		
View outreach services for individual patrons	Patron status: Access	Branch - Circulation
	Patron status: Display reader services	Branch - Circulation
Modify outreach services settings for individual patrons	Patron status: Modify reader services	Branch - Circulation
Manage outreach services for multiple patrons	Outreach Services Manager: Access	Branch - Circulation
Modify reader ratings for ORS patrons	Modify ORS patron ratings: Allow	System, Library, Branch - Circulation
From bib record, display list of ORS patrons with linked items in their reading histories	ORS: Link from bibliographic record: Allow	System - Circulation
<b>Working with Patron Accounts in Collections</b>		
Remove a specific amount on a patron's account from collection agency reporting	Patron status: Access Patron status: Access patron account Patron status: Modify patron account Remove collection agency	Branch - Circulation Branch - Circulation Branch - Circulation System - Circulation

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
	block: Allow	

## Cataloging Permissions Reference

These permissions are available under **Security, Cataloging** at the listed organizational levels on the Administration Explorer.

**Note:**

To do a cataloging task, both the staff member and the workstation must have the permission. For more information on the permissions required for specific Cataloging tasks, see [Cataloging Workflow Permissions](#).

Control Record	Org Levels	Permission	Description
Access cataloging subsystem	System	Allow	Access the Cataloging menu and workforms
Access bibliographic bulk change	System	Allow	Bulk change bibliographic records
Access bibliographic fixed fields bulk change	System	Allow	Bulk change fixed fields in bibliographic records
Access Carousel Toolkit	System	Allow	Use the Carousel Toolkit on the Utilities menu
Access item record bulk change	System	Allow	Bulk change item records. (You must also have the Item record: Bulk change permission to change item records owned by your organization.)

Control Record	Org Levels	Permission	Description
Authority create links to authority records	System	Allow	Create links from an authority record to other authority records.
Authority create links to bibliographic records	System	Allow	Create links from an authority record to bibliographic records.
Authority records	System	Access; Create; Modify; Delete/Undelete	Maintain authority control in the catalog.
Authority templates	System, Library, Branch	Access; Create; Modify; Delete	Maintain templates for authority MARC records.
Auto delete processing of reserve item records	System	Allow	Maintain course reserve item records; invoke the auto-delete process from the course reserve item record.
Bibliographic records	System, Library, Branch	Access; Create; Modify; Delete/Undelete	Maintain bibliographic MARC records.
Bibliographic templates	System, Library, Branch	Access; Create; Modify; Delete	Maintain templates for bibliographic MARC records
Campaigns	System, Library, Branch	Access; Create; Modify; Delete	Maintain campaigns or

Control Record	Org Levels	Permission	Description
			automatic promotions for the organization
Cataloging record sets	System, Library, Branch	Access; Create; Delete/Undelete; Export; Modify	Maintain cataloging record sets
Community records	System, Library, Branch, Staff, Workstation	Access; Create; Modify; Delete	Maintain community records for a library organization.
Course reserve records	System, Library, Branch	Access; Create; Modify; Delete	Maintain course reserve records
Course reserve templates	System, Library, Branch	Access; Create; Modify; Delete	Use course reserve templates.
Event import profiles	System	Access; Create; Modify; Delete	Manage Community Event import profiles
Export bibliographic, item and authority records	System	Allow	Export cataloging records
Express Importing	System	Allow	Users with this permission can use the Express Import option on the Utilities menu. This permission allows users to change settings on the Profile Setup and Record

Control Record	Org Levels	Permission	Description
			Set tabs on the Import Profile dialog box but not change the import settings for bibliographic, authority, or item records.
Import profiles	System	Access; Create; Modify; Delete	Maintain import profiles
Item Bulk Change Templates	System	Access: Create: Modify: Delete	Maintain Item Bulk Change Templates
Item records	System, Library, Branch	Access; Create; Modify; Delete/Undelete; Modify cataloging view; Modify header; Modify history view; Modify notes and notices view; Modify reserves view; Modify source and acquisitions view	Maintain and catalog item records
Item templates	System, Library, Branch	Access; Create; Modify; Delete	Maintain item templates
Label Manager Configuration	System	Create; Modify; Delete	Maintain labels for the organization
Manage import jobs for this organization	System, Branch	Allow	Manage import jobs launched by

Control Record	Org Levels	Permission	Description
			users logged into the system or the branch for which the permission is granted; specify blackout times for the organization.
Modify Do not overlay setting in bib records	System	Allow	Modify the <b>Do not overlay setting in bibliographic records</b> . With this permission, staff members can modify the <b>Do not overlay</b> checkbox in the Bibliographic Record workflow, the Bib Bulk Change dialog box, and the Import Setup window (provided they have the other required permissions).
Override invalid item barcode message	System	Allow	Override invalid item barcode message when saving an item record, including serial item records.
Promotions	System, Library,	Access; Create;	Maintain



Control Record	Org Levels	Permission	Description
	Branch	Modify; Delete	promotion records used to feature resources in the PAC. The library must have a license for Feature It.
Purge criteria	System, Library, Branch	Access; Create; Modify; Delete	Use the purge process to purge records marked as deleted but not removed from the database.
Quick-circ item records	Branch	Access; Create; Modify; Delete	Maintain ephemeral (quick-circ) items.
Reserve item templates	System, Library, Branch	Access; Create; Modify; Delete	Maintain reserve item templates.
Suppress warnings for breakable links when deleting multiple bibliographic records	System	Allow	Users can stop warning messages regarding breakable links to other records when deleting multiple bibliographic records
Suppress warnings for breakable links when deleting multiple item	System	Allow	Allow - Users can stop warning messages regarding breakable links to

Control Record	Org Levels	Permission	Description
records			other records when deleting multiple item records.
Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple bibliographic records	System	Allow	Users can stop warning messages regarding unbreakable links and other conditions when deleting multiple bibliographic records.
Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple item records	System	Allow	Users can stop warning messages regarding unbreakable links and other conditions when deleting multiple item records.
Use 'own' authority templates	System	Allow	Maintain own authority templates.
Use 'own' bibliographic templates	System	Allow	Maintain own bibliographic templates.
Use 'own' item bulk change templates	System	Allow	Allows staff to 'own' item record bulk change templates.

Control Record	Org Levels	Permission	Description
Use 'own' cataloging record sets	System	Allow	A staff member with this permission can create record sets that no other staff member or system administrator can access or modify. Grant this permission only if you want the staff member to create record sets that no one else can access.
Use 'own' course reserve templates	System	Allow	Maintain own course reserve templates.
Use 'own' item templates	System	Allow	Maintain own item templates.
Use 'own' reserve item templates	System	Allow	Maintain own reserve item templates.
Use URL Detective	System	Allow	Use the URL Detective utility available from the Utilities menu. A license for this utility is also required.

## Cataloging Workflow Permissions

The following table lists cataloging tasks, the Polaris permissions required to do the tasks, the administrative levels at which they can be set, and the subsystems where the permissions are located. For a list of all cataloging permissions and the level at which they can be set, see [Cataloging Permissions Reference](#).

**Note:**

To modify Polaris Administration profiles and parameters, you must have the following permissions:

- Access administration: Allow
- Modify parameters: Allow
- Modify profiles: Allow

Workflow	Required Permissions	Administration Explorer Security Location
<b>Maintain the Authority Catalog</b>		

Workflow	Required Permissions	Administration Explorer Security Location
<p>Maintain authority control headings</p> <p>Additional permission for enabling or disabling automatic re-indexing during the next server upgrade.</p>	<p>Access cataloging subsystem: Allow</p> <p>Authority records: Access</p> <p>Authority records: Create</p> <p>Authority records: Delete/Undelete</p> <p>Authority records: Modify</p> <p>Authority templates: Access</p> <p>Authority create links to authority records</p> <p>Authority create links to bibliographic records</p> <p>Access MARC Re-index during next server upgrade: Allow</p>	<p>System - Cataloging</p> <p>System - Cataloging</p> <p>System - Cataloging</p> <p>System - Cataloging</p> <p>System - Cataloging</p> <p>System, Library - Cataloging</p> <p>System - Cataloging</p> <p>System - Cataloging</p> <p>System - Cataloging</p>
<p>Maintain the standard authority control templates for the organization</p>	<p>Access cataloging subsystem: Allow</p> <p>Authority records: Access</p> <p>Authority templates: Access</p> <p>Authority templates: Create</p> <p>Authority templates: Delete</p> <p>Authority templates: Modify</p>	<p>System - Cataloging</p> <p>System - Cataloging</p> <p>System, Library, Branch - Cataloging</p> <p>System, Library, Branch - Cataloging</p> <p>System, Library, Branch - Cataloging</p> <p>System, Library, Branch - Cataloging</p>
<p>Use and edit the authority</p>	<p>Use 'own' authority templates: Allow</p>	<p>System - Cataloging</p>

Workflow	Required Permissions	Administration Explorer Security Location
<p>record templates the staff member created. (Add this permission to other authority control permissions to give staff members the ability to use their own templates without affecting the organization’s templates.)</p>		
<p><b>Maintain the Bibliographic Catalog</b></p>		
<p>Add bibliographic entries to the catalog (original and copy cataloging)</p>	<p>Access cataloging subsystem: Allow                      Bibliographic records: Access                      Bibliographic records: Create                      Bibliographic records: Modify                      Bibliographic templates: Access</p>	<p>System - Cataloging                      System, Library, Branch - Cataloging                      System, Library, Branch -- Cataloging                      System, Library, Branch - Cataloging                      System, Library, Branch - Cataloging</p>
<p>Create authority records from heading tags in a bibliographic record</p>	<p>Authority records: Create                      Bibliographic records: Access</p>	<p>System - Cataloging                      System, Library, Branch - Cataloging</p>

Workflow	Required Permissions	Administration Explorer Security Location
<p>Maintain existing bibliographic records, including replacing and protecting records.</p>	<p>Access cataloging subsystem: Allow</p> <p>Bibliographic records: Access</p> <p>Bibliographic records: Delete/Undelete</p> <p>Bibliographic records: Modify</p> <p>Modify Do not Overlay setting in Bib records: Allow</p>	<p>System - Cataloging</p> <p>System, Library, Branch - Cataloging</p> <p>System, Library, Branch - Cataloging</p> <p>System, Library, Branch - Cataloging</p> <p>System - Cataloging</p>
<p>Prevent warning messages from appearing when deleting multiple bibliographic records</p>	<p>Suppress warnings for breakable links when deleting multiple bibliographic records: Allow</p> <p>Suppress warnings for unbreakable links and other stopping conditions, when deleting multiple bibliographic records: Allow</p>	<p>System - Cataloging</p> <p>System - Cataloging</p>
<p>Additional permission for enabling or disabling automatic re-indexing during the next server upgrade.</p>	<p>Access MARC Re-index during next server upgrade: Allow</p>	<p>System - Cataloging</p>

Workflow	Required Permissions	Administration Explorer Security Location
Bulk change bibliographic records	Access cataloging subsystem	System - Cataloging
	Bibliographic records: Access (for all records)	System, Library, Branch - Cataloging
	Bibliographic records: Modify (for all records)	System, Library, Branch - Cataloging
	Cataloging record sets: Access	System, Library, Branch - Cataloging
	Cataloging record sets: Create	System, Library, Branch - Cataloging
	Cataloging record sets: Delete/Undelete	System, Library, Branch - Cataloging
	Cataloging record sets: Modify	System, Library, Branch - Cataloging
	Access bibliographic bulk change: Allow	System - Cataloging
	Access bibliographic fixed fields bulk change: Allow	System - Cataloging



Workflow	Required Permissions	Administration Explorer Security Location
<p>Maintain bibliographic record templates used by the entire organization</p>	<p>Access cataloging subsystem: Allow</p> <p>Bibliographic templates: Create</p> <p>Bibliographic template: Access</p> <p>Bibliographic templates: Delete</p> <p>Bibliographic templates: Modify</p> <p>Bibliographic records: Access</p>	<p>System - Cataloging</p> <p>System, Library, Branch - Cataloging</p> <p>System, Library, Branch - Cataloging</p> <p>System, Library, Branch - Cataloging</p> <p>System, Library, Branch - Cataloging</p> <p>System, Library, Branch - Cataloging</p>
<p>Use and edit the bibliographic record templates the staff member created. (Add to other bibliographic record permissions so staff members can use their own templates without affecting the organization's templates.)</p>	<p>Use 'own' bibliographic templates: Allow</p>	<p>System - Cataloging</p>
<p>Protect bibliographic records from overlay.</p>	<p>Modify do not overlay setting in bib records: Allow</p> <p>Bibliographic records: Access</p> <p>Bibliographic records: Modify</p> <p>(To change the setting in</p>	<p>System - Cataloging</p> <p>(Note: The Cataloging parameter, Bibliographic record do not overlay feature, must be set to Yes to display the <b>Do not overlay</b> checkbox in the Bibliographic Record workform, the Bib Bulk</p>

Workflow	Required Permissions	Administration Explorer Security Location
	the Bib Bulk Change dialog or Import Setup window, the user must also have the required permissions for these functions.)	Change dialog box, and the Import Setup window.)
<b>Maintain Item Records</b>		
Add item records to the catalog	Access cataloging subsystem: Allow Item records: Create Bibliographic records: Access Item records: Access Item records: Modify cataloging view Item templates: Access Override invalid item barcode message: Allow	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System

Workflow	Required Permissions	Administration Explorer Security Location
Maintain existing item records	Access cataloging subsystem: Allow Item records: Access Item records: Modify cataloging view Item records: Modify header Item records: Modify history view Item records: Modify notes and notices view Item records: Modify reserves view Item records: Modify source and acquisition view Item records: Delete/Undelete Bibliographic records: Access Note - Item records: Create is necessary to change the owner on the item record.	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Prevent warning messages from appearing when deleting multiple item records	Suppress warnings for breakable links when deleting multiple item records: Allow Suppress warnings for unbreakable links and	System - Cataloging System - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
	other stopping conditions, when deleting multiple item records: Allow	
Override and continue when invalid barcode message appears	Override invalid item barcode message: Allow	System - Cataloging
Maintain item records for ephemeral items so that they can be circulated	Quick-circ item records: Access	Branch - Cataloging
	Quick-circ item records: Create	Branch - Cataloging
	Quick-circ item records: Modify	Branch - Cataloging
	Quick-circ item records: Delete	Branch - Cataloging
Create bibliographic records from item records or item templates	Create a bib record from the item or item template: Allow	System - Cataloging
Bulk change item records	Access cataloging subsystem: Allow	System - Cataloging
	Item records: Access	System, Library, Branch - Cataloging
	Item records: Bulk change	System, Library, Branch - Cataloging
	Item records: Modify header	System, Library, Branch - Cataloging
	Cataloging record sets: Access	System, Library, Branch - Cataloging
	Cataloging record sets:	System, Library, Branch -

Workflow	Required Permissions	Administration Explorer Security Location
	Create	Cataloging
	Cataloging record sets: Modify	System, Library, Branch - Cataloging
	Access item record bulk change: Allow	System - Cataloging
Bulk change item records using templates	Item bulk change templates: Access	System, Library, Branch - Cataloging
	Item bulk change templates: Create	System, Library, Branch - Cataloging
	Item bulk change templates: Delete	System, Library, Branch - Cataloging
	Item bulk change templates: Modify	System, Library, Branch - Cataloging
Maintain item templates used by the organization	Access cataloging subsystem: Allow	System - Cataloging
	Item templates: Create	System, Library, Branch - Cataloging
	Item templates: Delete	System, Library, Branch - Cataloging
	Item templates: Access	System, Library, Branch - Cataloging
	Item templates: Modify	System, Library, Branch - Cataloging
	Item records: Access	System, Library, Branch - Cataloging
Use and edit the item templates the staff	Use 'own' item templates: Allow	System - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
member created. (Add this permission to other workflow permissions to allow the staff member access to templates they created.)		
	Use 'own' item bulk change templates	System - Cataloging
<b>Maintain Labels for the Organization</b>		
Create, modify, and delete label configurations	Label Manager Configuration: Create Label Manager Configuration: Delete Label Manager Configuration: Modify	System - Cataloging System - Cataloging System - Cataloging
<b>Maintain Import Profiles in Import Profile Manager</b>		
Create, modify, and delete import profiles	Import profiles: Access Import profiles: Create Import profiles: Delete Import profiles: Modify	System - Cataloging System - Cataloging System - Cataloging System - Cataloging
<b>Import Records</b>		

Workflow	Required Permissions	Administration Explorer Security Location
Import bibliographic, authority, and item records using Express Import	Bibliographic records: Create Bibliographic records: Modify Authority records: Create Authority records: Modify Express import: Allow Item records: Create Cataloging record sets: Create Cataloging record sets: Access	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System - Cataloging System - Cataloging System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Import bibliographic, authority, and item records using Full Import	Bibliographic records: Create Bibliographic records: Modify Authority records: Create Authority records: Modify Import bibliographic, item and authority records: Allow Item records: Create Cataloging record sets: Create Cataloging record sets: Access	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System - Cataloging System - Cataloging System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Manage your own import	Import bibliographic, item	System - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
jobs from the import jobs queue	and authority records: Allow or Express import: Allow	
Manage import jobs for a branch or for the system	Manage import jobs for this organization: Allow	System, Branch - Cataloging
Specify blackout times when importing cannot be run.	Modify import blackout times: Allow	System - System Administration
<b>Export Records</b>		
Export bibliographic, authority, and item records from the Polaris catalog	Export bibliographic, item and authority records: Allow	System - Cataloging
Export Cataloging record sets from Leap to Excel <b>Note:</b> You can only export record sets owned at the System, Library, or Branch level. Record sets owned by individuals cannot be exported.	Cataloging record sets: Export	System, Library, Branch - Cataloging
<b>Maintain Cataloging Record Sets</b>		



Workflow	Required Permissions	Administration Explorer Security Location
Maintain authority, bibliographic, and item record sets used by the entire organization	Access cataloging subsystem: Allow Cataloging record sets: Access Cataloging record sets: Modify Cataloging record sets: Delete/Undelete Bibliographic records: Access Authority records: Access Item records: Access	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System - Cataloging System, Library, Branch - Cataloging
Use and edit the authority, bibliographic, and item record sets the staff member created	Use 'own' cataloging record sets	System - Cataloging
<b>Purge Cataloging Records Marked as Deleted</b>		
Maintain purge criteria that are used to purge cataloging records from the database when they are marked for deletion but retained in the database	Purge criteria: Access Purge criteria: Delete Purge criteria: Create Purge criteria: Modify	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
<b>Maintain Course Reserves</b>		

Workflow	Required Permissions	Administration Explorer Security Location
Maintain course reserve records	Access cataloging subsystem: Allow Course reserve records: Access Course reserve records: Delete Course reserve records: Create Course reserve records: Modify Patron registration: Access Patron registration: Modify	System - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging Branch - Circulation Branch - Circulation
Maintain reserve items	Item records: Access Item records: Modify reserves view Auto delete processing of reserve item records: Allow	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System - Cataloging
Maintain reserve item templates used by the organization	Reserve item templates: Access Reserve item templates: Create Reserve item templates: Modify Reserve item templates: Delete	System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Use and edit the reserve item templates the staff member created	Use 'own' reserve item templates: Allow	System - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
Maintain course reserve templates for the organization	Course reserve templates: Access Course reserve templates: Delete Course reserve templates: Create Course reserve templates: Modify	System, Library, Branch - Cataloging  System, Library, Branch - Cataloging  System, Library, Branch - Cataloging  System, Library, Branch - Cataloging
<b>Update URL Links</b>		
Use the Polaris URL Detective, which is available from the Utilities menu if your library has purchased this product.	Use URL Detective: Allow	System - Cataloging
<b>Maintain Community records</b>		
Maintain Community records (if your library has purchased Community Profiles)	Community records: Access Community records: Create Community records: Modify Community records: Delete	System, Library, Branch, Staff, Workstation - Cataloging
Managing Event imports	Event import profiles: Access Event import profiles: Create Event import profiles: Modify	System- Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
	Event import profiles: Delete	
<b>Maintain Promotion records</b>		
Work with Promotion records (if your library has purchased Feature It)	Access cataloging subsystem: Allow Promotion records: Access Promotion records: Create Promotion records: Modify Promotion records: Delete	System System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging System, Library, Branch - Cataloging
<b>Feature bibliographic records</b>	Bibliographic records: Access	System, Library, Branch - Cataloging

## Acquisitions Permissions Reference

**Note:**

To do an acquisitions task, both the staff member and the workstation on which they are doing the task must have the permission. For more information on the set of permissions required to do specific Acquisitions tasks, see [Acquisitions Workflow Permissions](#).

Control Record	Org Levels	Permissions	Description
Access acquisitions	System	Allow	Open Acquisitions workforms.
Adjust currency exchange rate	System, Library	Allow	Update the currency exchange rates for enabled currencies.
Check in shelf ready materials	System	Allow	Use the Check In Shelf Ready Materials workform to receive shelf-ready items.
Claim alert list	System	Access	Process and manage Acquisitions claims.
Claim record	Branch	Access, Create, Modify, Delete	Manage claiming.
Create a bib record from acquisitions and serials	System	Allow	Create bibliographic records as part of acquisitions and serials processing.
Create and delete item record from acquisitions and serials	System	Allow	Create and delete item records while performing acquisitions and serials tasks. This

Control Record	Org Levels	Permissions	Description
			permission is required to automatically delete item record when deleting serials issues.
Export acquisitions data	System	Access	Access the application to export acquisitions data from the Polaris ILS.
Fiscal Years	Branch	Access, Create, Modify, Delete	Work with fiscal year records
Funds	Branch	Access, Create, Modify, Delete, Transfer money between funds.	Maintain the budget accounts owned by the branch.
Invoices	Branch	Access, Create, Modify, Delete, Pay invoices exceeding fund expenditure limits, Pay, Undo payment, Credit, Print vouchers	Maintain invoices owned by the branch.
Modify a bibliographic record from acquisitions and serials	System	Allow	Modify bibliographic records as part of acquisitions and serials processing. With this permission, you can change the <b>Display</b>

Control Record	Org Levels	Permissions	Description
			<p><b>in PAC</b> setting for bibliographic records linked to the line items when you release or cancel a purchase order. This permission alone does not allow you to open bibliographic records and modify the MARC data. To do this, you also need the Cataloging permission <b>Bibliographic records: Modify.</b></p>
Modify tax rates table	System	Allow	Modify tax rates in the Tax Rates database table.
Process EDI invoices	System	Allow	Use the Process EDI Invoices workform to display and process EDI invoices for partial shipments.
Purchase orders	Branch	Access; Change fund, destination, collection; Create; Delete; Delete cancelled orders; Modify; Print purchase orders;	Work with purchase orders at the branch at which the permissions were assigned.

Control Record	Org Levels	Permissions	Description
		Print workslips; Release order exceeding fund encumbrance limits; Release order resulting in negative fund free balance; Release, receive, cancel, close PO; Send electronic purchase orders; Undo Receipt; Change fund, destination, collection	
Purge purchase orders and invoices	System	Allow	Use the purge process to remove old purchase orders and invoices from the database.
Receive ASN Shipments	System	Allow	Use the Receive ASN Shipment workform to receive shipments.
Run fiscal year utility	System	Allow	Use the fiscal year utility to roll over fiscal years.
Selection List Line Item Segments	Branch	Access; Create; Modify; Delete	Work with selection list line item segments for the branches at which the permission is granted.



## Acquisitions Workflow Permissions

Acquisitions permissions define who can create, access, and work with acquisitions records and functions. Some tasks require additional permissions, such as Cataloging permissions to work with bibliographic records. Each organization can specify which groups, workstations, or staff are allowed to work with records and control processes. For general information about setting permissions in Polaris, see the Polaris *Administration Guide*, "Granting Permissions."

The following table lists acquisitions tasks, the Polaris permissions required to do the tasks, the administrative levels at which they can be set, and the subsystems where the permissions are located.

**Note:**

The following permissions are required to modify Polaris Administration profiles and parameters:

**Access administration: Allow**

**Modify parameters: Allow**

**Modify profiles: Allow**

For more information, see the *Cataloging Administration Guide*, "Administration Workflow Permissions."

### Manage the Acquisitions Budget Permissions

Workflow	Required Permissions	Administration Explorer Security Location
Define fund categories	Access acquisitions: Allow	System - Acquisitions
	Access Administration: Allow	System - Acquisitions
	Modify donation fund category table: Allow	System - Acquisitions
Add a fiscal year to Polaris	Access acquisitions: Allow	System - Acquisitions
	Fiscal years: Create	Branch - Acquisitions

Manage the Acquisitions Budget Permissions

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
Change a fiscal year	Access acquisitions: Allow	System - Acquisitions
	Fiscal years: Access	Branch - Acquisitions
	Fiscal years: Modify	Branch - Acquisitions
Delete fiscal year records	Access acquisitions: Allow	System - Acquisitions
	Fiscal years: Access	Branch - Acquisitions
	Fiscal years: Delete	Branch - Acquisitions
Add a fund record	Access acquisitions: Allow	System - Acquisitions
	Fiscal years: Access	Branch - Acquisitions
	Funds: Create	Branch - Acquisitions
Delete fund records	Access acquisitions: Allow	System - Acquisitions
	Funds: Access	Branch - Acquisitions
	Funds: Delete	Branch - Acquisitions
Maintain fund account information	Access acquisitions: Allow	System - Acquisitions
	Funds: Access	Branch - Acquisitions
	Funds: Modify	Branch - Acquisitions
Transfer money between funds	Access acquisitions: Allow	System - Acquisitions
	Funds: Access	Branch - Acquisitions
	Funds: Modify	Branch - Acquisitions
	Funds: Transfer money between funds	System - Acquisitions

Select Material Permissions

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
Select Material Permissions		

Workflow	Required Permissions	Administration Explorer Security Location	
<p>Create and manage selection lists for the organization, including titles added by other selectors, and copy the selection lists to purchase orders.</p>	Funds: Modify	System - Acquisitions	
	Funds: Transfer money between funds	Library - Acquisitions	
	Selection lists: Create	Library - Acquisitions	
	Selection lists: Modify	Library - Acquisitions	
	Selection lists: Approve/Reject	Library - Acquisitions	
	Selection lists: Delete	Library - Acquisitions	
	Access cataloging subsystem: Allow	System - Acquisitions	
	Bibliographic records: Access	System, Library, Branch - Cataloging	
<p>Add a title that is not in the Polaris database. From the Selection List Line Item workform, search for the title in external databases using Z39.50, and create a provisional bibliographic record.</p>	Cataloging record sets: Access	System, Library, Branch - Cataloging	
	Cataloging record sets: Create	System, Library, Branch - Cataloging	
	Cataloging record sets: Modify	System, Library, Branch - Cataloging	
	Purchase orders: Access	Branch - Acquisitions	
	Purchase orders: Create	Branch - Acquisitions	
	Purchase orders: Modify	Branch - Acquisitions	
	Bibliographic records: Create Create a bib record from Acquisitions and Serials: Allow	System, Library, Branch - Cataloging	System - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Create and modify selection lists, selection list line items, and segments. Do Z39.50 searches from a selection list line item, and create provisional records.	Access acquisitions: Allow	System - Acquisitions
	Selection lists: Access	Library - Acquisitions
	Selection lists: Create	Library - Acquisitions
	Selection lists: Modify	System, Library, Branch - Cataloging
Merge selection lists	Access acquisitions: Allow	System - Acquisitions
	Selection lists: Access	Library - Acquisitions
	Selection lists: Modify	Library - Acquisitions
	Selection lists: Delete	Library - Acquisitions
Rename selection lists	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions
Delete selection lists	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Delete	Library - Acquisitions
Modify a selection list line item's status	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Approve or reject selection list line items	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions
	Selection Lists: Approve/Reject	Library - Acquisitions
Work with selection list line item segments. (This set of permissions allows the user to add, modify, and delete selection list line item segments for the branches at which this permission was granted.)	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection List Line Item Segments: Create, modify, delete	Branch - Acquisitions
Bulk add titles to selection lists from record sets	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions
	Bibliographic records: Access	System, Library, Branch - Cataloging
	Access cataloging subsystem: Allow	System, Library, Branch - Cataloging
	Cataloging record sets: Access	System, Library, Branch - Cataloging
	Cataloging record sets: Create	System, Library, Branch - Cataloging
	Cataloging records sets: Modify	System, Library, Branch - Cataloging

Workflow	Required Permissions	Administration Explorer Security Location
Copy selection list line items to a selection list	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions
Copy selection list line items to a new or existing purchase order	Access acquisitions: Allow	System - Acquisitions
	Selection Lists: Access	Library - Acquisitions
	Selection Lists: Modify	Library - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
<p>Manage Supplier Records Permissions</p> <p>(Supplier records are available from the Serials and Acquisitions menus on the Polaris Shortcut Bar, but the permissions for Suppliers are available under <b>Serials</b> in the Polaris Administration Explorer Security folder.)</p>		
Add a supplier record to Polaris	Access serials: Allow	System - Serials
	Suppliers: Create	Library - Serials
Delete supplier records	Access serials: Allow	System - Serials
	Suppliers: Access	Branch - Serials
	Suppliers: Delete	Branch - Serials
Maintain the information in existing supplier records	Access serials: Allow	System - Serials
	Suppliers: Access	Branch - Serials
	Suppliers: Modify	Branch - Serials
	Suppliers: Modify postal address fields	System - Serials
Maintain Link to Supplier Databases Table Permissions		
Add and remove suppliers	Access administration:	System - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
from the Link to Supplier Databases table	Allow	
	Modify links to supplier databases table: Allow	System - Acquisitions
<b>Order Materials Permissions</b>		
Create new purchase orders and add titles to existing purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Create	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Funds: Access	Branch - Acquisitions
Add line items to a purchase order. Add a title without a bib in the database by doing a Z39.50 search.	Suppliers: Access	Branch - Acquisitions
	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Bibliographic records: Access	System, Library, Branch - Cataloging
	Bibliographic records: Create	System, Library, Branch - Cataloging
	Create a bib record from acquisitions and serials: Allow	System - Acquisitions
	Modify a bib record from acquisitions and serials: Allow	System - Acquisitions
	Selection Lists: Access	Branch - Acquisitions
Funds: Access	Branch - Acquisitions	



Workflow	Required Permissions	Administration Explorer Security Location
Bulk add titles to purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Access Cataloging subsystem: Allow	System - Cataloging
	Cataloging record sets: Access	System, Library, Branch - Cataloging
	Use 'own' cataloging record sets: Allow	System, Library, Branch - Cataloging
	Purchase orders: Modify	Branch
	Bibliographic records: Access	System, Library, Branch - Cataloging
	Funds: Access	Branch - Acquisitions
	Express importing: Allow	System, Library, Branch - Cataloging
Remove unused purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Delete	Branch - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Release purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Purchase orders: Release, receive, cancel, close PO	Branch - Acquisitions
	Purchase orders: Release order exceeding fund encumbrance limits	Branch - Acquisitions
	Purchase orders: Release order resulting in negative fund free balance	Branch - Acquisitions
	Modify a bib record from acquisitions and serials: Allow (This permission allows user to change only the <b>Display in PAC</b> setting in bibliographic records.)	System - Acquisitions
Create item records when material is ordered	Access acquisitions: Allow	System - Acquisitions
	Create and delete item records from acquisitions and serials: Allow	System - Acquisitions
Print purchase orders to mail or fax to supplier	Access acquisitions: Allow	System - Acquisitions
	Print purchase orders: Allow	Branch - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Send purchase orders electronically via EDI	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Send electronic purchase orders	Branch - Acquisitions
Receive Materials Permissions		

Workflow	Required Permissions	Administration Explorer Security Location
<p>Receive purchase orders and create invoices. Receive from an invoice.</p>	Access acquisitions: Allow	System - Acquisitions
	Invoices: Access	Branch - Acquisitions
	Invoices: Create	Branch - Acquisitions
	Invoices: Modify	Branch - Acquisitions
	Bibliographic records: Access	System, Library, Branch - Cataloging
	Purchase orders: Access	Branch - Acquisitions
	Suppliers: Access	Branch - Acquisitions
	Purchase orders: Print workslips	Branch - Acquisitions
	Funds: Access	Branch - Acquisitions
	Purchase orders: Release, receive, cancel, close PO	Branch - Acquisitions
	Purchase orders: Undo receipt	Branch - Acquisitions
	Access cataloging subsystem: Allow	System - Cataloging
<p>Check in shelf-ready items and receive purchase order line items using the Check In Shelf-Ready Materials workform.</p>	<p>Check in shelf-ready materials: Allow (Only this permission and <b>Access acquisitions: Allow</b> are required to use the Check In Shelf-ready Materials workform.)</p>	System - Acquisitions
<p>Receive cartons of materials by scanning (or entering) the barcode on</p>	<p>Receive ASN Shipments: Allow</p>	System - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
the outside of the box.		
Claim Ordered Items Permissions		
Claim items when shipments are processed and materials did not arrive as expected	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Claim record: Create	Branch - Acquisitions
Claim from the Claim Alert List	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Claim record: Access	Branch - Acquisitions
	Claim record: Create	Branch - Acquisitions
	Claim alert list: Access	System - Acquisitions
Maintain claim records	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Claim record: Access	Branch - Acquisitions
	Claim record: Create	Branch - Acquisitions
	Claim record: Modify	Branch - Acquisitions
	Claim record: Delete	Branch - Acquisitions
Print from Claim Alert List	Access acquisitions: Allow	System - Acquisitions
	Claim alert list: Access	System - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Cancel Ordered Items Permissions		
Cancel purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Purchase orders: Release, receive, cancel, close PO	Branch - Acquisitions
	Claim record: Access	Branch - Acquisitions
	Claim record: Modify	Branch - Acquisitions
	Claim record: Delete	Branch - Acquisitions
	Claim alert list: Access	System - Acquisitions
Delete canceled purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Modify	Branch - Acquisitions
	Delete cancelled purchase orders: Allow	Branch - Acquisitions
Remove unused purchase orders	Access acquisitions: Allow	System - Acquisitions
	Purchase orders: Access	Branch - Acquisitions
	Purchase orders: Delete	Branch - Acquisitions
Invoice Materials Permissions		
Create invoices	Access acquisitions: Allow	System - Acquisitions
	Invoices: Access	Branch - Acquisitions
	Invoices: Create	Branch - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Pay, undo payment, credit, or adjust invoices	Access acquisitions: Allow	System - Acquisitions
	Invoices: Access	Branch - Acquisitions
	Invoices: Adjust	Branch - Acquisitions
	Invoices: Modify	Branch - Acquisitions
	Invoices: Pay, Undo payment, Credit	Branch - Acquisitions
	Invoices: Print vouchers	Branch - Acquisitions
	Invoices: Pay invoice exceeding fund expenditure limits (allows user to exceed the expenditure limits and the fund free balance)	Branch - Acquisitions
Delete invoices	Access acquisitions: Allow	System - Acquisitions
	Invoices: Access	Branch - Acquisitions
	Invoices: Modify	Branch - Acquisitions
	Invoices: Delete	Branch - Acquisitions
Link invoices	Access acquisitions: Allow	System - Acquisitions
	Invoices: Access	Branch - Acquisitions
	Invoices: Modify	Branch - Acquisitions
Generate EDI invoices for partial shipments	Process EDI Invoices: Allow	System - Acquisitions
Manage Foreign Currencies Permissions		
Add or modify a currency in the Currencies policy table	Modify currencies table: Allow (Administration permission)	System - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
	Access tables: Allow (Administration permission)	System - Acquisitions
Adjust the currency exchange rate	Adjust currency exchange rates: Allow	System, Library - Acquisitions

**Related Information**

- Permissions for administering acquisitions - Administration permissions are required to modify the donation fund database table and create links to supplier databases. See the *Polaris Administration Guide*, "Acquisitions Administration Permissions."
- Acquisitions permissions list - See Acquisitions Permissions for an alphabetical reference list.



## Serials Permissions Reference

These permissions are available under **Security** > **Serials** at the listed organizational levels on the Administration Explorer.

**Note:**

To do a serials task, both the staff member and the workstation must have the permissions.

For more information on setting permissions for specific Serials workflows, see the Serial Administration PDF Guide, Set serials security topic.

Control Record	Org Levels	Permission	Description
Access serials	System	Allow	Access the Serials menu and workforms
Route lists	System, Library, Branch	Access; Create; Modify; Delete; Modify route status	Route serial issues and other materials
Serial holdings records	Branch	Access; Create; Modify; Delete	Work with serial holdings records including publication patterns and pattern templates
Serial issues/standing order parts	Branch	Access; Create; Modify; Claim; Delete; Check-in; Uncheck-in	Work with serial issues and standing order parts
Subscription records	System, Library, Branch	Access; Create; Modify; Delete; Cancel and Renew	Maintain subscriptions
Suppliers	Branch	Access; Create;	Work with supplier

Control Record	Org Levels	Permission	Description
		Modify; Delete; Modify postal address fields	records that belong to the branch

### Serials Workflow Permissions

The following table lists serials tasks, the Polaris permissions required to do the tasks, the administrative levels at which they can be set, and the subsystems where the permissions are located. Some permissions required for Serials processing are also used in other subsystems. For example, the Acquisitions permission **Create a bib record from acquisitions and serials: Allow** is used in both subsystems.

**Tip:**

Not all permissions are specific to Serials. There are other permissions which apply to Serials, but are not configured within Serials, such as the Cataloging permission **Override invalid item barcode message: Allow** and the Acquisitions permission **Create a bib record from acquisitions and serials: Allow**.

**Note:**

To modify Polaris Administration profiles and parameters, you must have the following permissions:

**Access administration: Allow**

**Modify parameters: Allow**

**Modify profiles: Allow**

For more information, see the Polaris Administration Guide, "Setting Administration Permissions."

Workflow	Required Permissions	Administration Explorer Security Location
Manage Serial Holdings		

Workflow	Required Permissions	Administration Explorer Security Location
Maintain serial holdings records (including publication patterns)	Access serials: Allow	System - Serials
	Serial holdings records: Create	System, Branch - Serials
	Serial holdings records: Modify	System, Branch - Serials
	Serial holdings records: Access	System, Branch - Serials
	Serial holdings records: Delete	System, Branch - Serials
Control whether Polaris automatically creates issues or part records	Access serials: Allow	System - Serials
	Serial holdings records: Access	System, Branch - Serials
	Serial holdings records: Modify	System, Branch - Serials
<b>Manage Subscriptions</b>		
<div data-bbox="284 1522 522 1663" style="background-color: #e0e0e0; padding: 5px; display: inline-block;">Add a subscription icon</div>	Access serials: Allow	System - Serials
	Subscription records: Access	System, Library, Branch - Serials
	Subscription records: Create	System, Library, Branch - Serials
	Funds: Access	System, Library, Branch - Acquisitions

Workflow	Required Permissions	Administration Explorer Security Location
Maintain subscription records	<b>Access serials: Allow</b>	System - Serials
	Subscription records: Access	System, Library, Branch - Serials
	<b>Subscription records: Modify</b>	System, Library, Branch - Serials
	<b>Funds: Access</b>	System, Library, Branch - Acquisitions
Renew or cancel a subscription	<b>Access serials: Allow</b>	System - Serials
	<b>Subscription records: Cancel and Renew</b>	System, Library, Branch - Serials
Delete subscription records	<b>Access serials: Allow</b>	System - Serials
	<b>Subscription records: Access</b>	System, Library, Branch - Serials
	<b>Subscription records: Delete</b>	System, Library, Branch - Serials
Set subscription cancellation text and print parameters	<b>Access serials: Allow</b>	System - Serials
	<b>Access reports and notices: Allow</b>	System - System Administration
Manage Serial Issues/Parts		

Workflow	Required Permissions	Administration Explorer Security Location
Create, access, modify, and delete issues or parts	<b>Access serials: Allow</b>	System - Serials
	<b>Serial Issues/Standing Order Parts: Create</b>	Branch - Serials
	<b>Serial Issues/Standing Order Parts: Access</b>	Branch - Serials
	<b>Serial Issues/Standing Order Parts: Modify</b>	Branch - Serials
	<b>Serial Issues/Standing Order Parts: Delete</b>	Branch - Serials
	<b>Serial holdings records: Access</b>	Branch - Serials
Checking in serial issues/parts	<b>Access serials: Allow</b>	System - Serials
	<b>Serial Issues/Standing Order Parts: Access</b>	Branch - Serials
	<b>Serial Issues/Standing Order Parts:</b>	Branch - Serials

Workflow	Required Permissions	Administration Explorer Security Location
	<b>Delete</b>	
	<b>Serial Issues/Standing Order Parts: Check-in Serial Issues/Standing Order Parts:</b>	Branch - Serials
	<b>UnCheck-in</b>	Branch - Serials
	<b>Serial holdings records: Access</b>	Branch - Serials
	<b>Serial Issues/Standing Order Parts: Modify</b>	System, Branch
	<b>Create a bib record from acquisitions and serials: Allow (optional)</b>	System - Acquisitions
	<b>Create and delete item records from acquisitions and serials: Allow (if creating item records)</b>	System - Acquisitions
		Default shelving scheme for new item and holdings records: Allow

Workflow	Required Permissions	Administration Explorer Security Location
Delete serial items linked to issues or parts	<b>Access serials: Allow</b>	System - Serials
	<b>Serial Issues/Standing Order Parts: Create</b>	System, Branch - Serials
	<b>Serial Issues/Standing Order Parts: Access</b>	System, Branch - Serials
	<b>Serial Issues/Standing Order Parts: Modify</b>	System, Branch - Serials
	<b>Serial Issues/Standing Order Parts: Delete</b>	System, Branch - Serials
	<b>Item records: Delete/Undelete</b>	System, Branch - Serials
	<b>Create and delete item records from acquisitions and serials: Allow</b>	System, Branch - Acquisitions
Maintain Route Lists		
Create a route list	<b>Access serials: Allow</b>	System - Serials
	<b>Route lists: Create</b>	System, Library, Branch - Serials

Workflow	Required Permissions	Administration Explorer Security Location
	<b>Serial holdings records: Access</b>	System, Branch - Serials
	<b>Route lists: Access</b>	System, Library, Branch - Serials
Modify a route list	<b>Access serials: Allow</b>	System - Serials
	<b>Route lists: Access</b>	System, Library, Branch - Serials
	<b>Route lists: Modify</b>	System, Library, Branch - Serials
	<b>Route lists: Modify route status</b>	System, Library, Branch - Serials
Delete a route list	<b>Access serials: Allow</b>	System - Serials
	<b>Route lists: Access</b>	System, Library, Branch - Serials
	<b>Route lists: Delete</b>	System, Library, Branch - Serials
Set up route list defaults	<b>Access serials: Allow</b>	System - Serials
	<b>Access administration: Allow</b>	System - System Administration
	<b>Modify profiles: Allow</b>	System - System Administration
Claim Serials Issues/Parts		



Workflow	Required Permissions	Administration Explorer Security Location
Enter and change serials claiming information in supplier records	<b>Access serials: Allow</b>	System - Serials
	<b>Suppliers: Create</b>	Branch - Serials
	<b>Suppliers: Access</b>	Branch - Serials
	<b>Suppliers: Modify</b>	Branch - Serials
	<b>Suppliers: Modify postal address fields</b>	Branch - Serials
Generate serials claims	<b>Access serials: Allow</b>	System - Serials
	<b>Claim alert list: Access</b>	System - Acquisitions
	<b>Serial issues/standing order parts: Claim</b>	System, Branch - Serials
Set up claim notices in Polaris Administration	<b>Access serials: Allow</b>	System - Serials
	<b>Access administration: Allow</b>	System - System Administration
	<b>Modify parameters: Allow</b>	System - System Administration
	<b>Access reports and notices: Allow</b>	System - System Administration
	<b>Suppliers: Access</b>	Branch - Serials

<b>Workflow</b>	<b>Required Permissions</b>	<b>Administration Explorer Security Location</b>
	<b>Suppliers: Modify</b>	Branch - Serials
Generate claim notices	<b>Access serials: Allow</b>	System - Serials
	Access reports and notices: Allow	System - System Administration
	<b>Claim alert list: Access</b>	System - Acquisitions

## Glossary

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### 0

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#### **006 field**

Fixed-length Data Elements - Additional Material Characteristics: This field contains 18 character positions (00-17) that provide for coding information about special aspects of the item being cataloged that cannot be coded in field 008 (Fixed-Length Data Elements). It is used in cases when an item has multiple characteristics. It is also used to record the coded serial aspects of nontextual continuing resources. The field has a tree structure, whereby the code given in 006/00 (Form of material) determines the data elements defined for subsequent character positions. Except for code s (Serial/Integrating resource), the codes in field 006/00 correspond to those in Leader/06 (Type of record). For each occurrence of field 006, the codes defined for character positions 01-17 will be the same as those defined in the corresponding field 008, character positions 18-34. Configurations of field 006 are given in the following order: books, computer files/electronic resources, maps, music, continuing resources, visual materials, and mixed materials.

#### **007 field**

Physical Description, Fixed Field - This field contains special information about the physical characteristics in a coded form. The information may represent the whole item or parts of an item such as accompanying material. The data elements in field 007 are positionally defined and the number of character positions in field 007 depends upon the code contained in 007/00. Character position 00 contains a code that identifies the category of material. The fill character (I) is not allowed in this position. The fill character may be used in any other character position when the cataloging agency makes no attempt to code the position. The categories of material for which field 007 is applicable in bibliographic records are presented in the following order in the field description: map, electronic resource, globe, tactile material, projected graphic, microform, non-projected graphic, motion picture, kit, notated music, remote-sensing image, sound recording, text, videorecording, and unspecified.

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**008 field**

Fixed-length Data Elements - General Information This field contains 40 character positions (00-39) that provide coded information about the record as a whole and about special bibliographic aspects of the item being cataloged. These coded data elements are potentially useful for retrieval and data management purposes. The data elements are positionally defined. Character positions that are not defined contain a blank (#). All defined character positions must contain a defined code; for some field 008 positions, this may be the fill character (I). The fill character may be used (in certain character positions) when a cataloging organization makes no attempt to code the character position. The fill character is not allowed in field 008 positions 00-05 (Date entered on file). Its use is discouraged in positions 07-10 (Date 1), 15-17 (Place of publication, production, or execution), and the 008 position defined for Form of item (either position 23 or 29 depending upon the 008 configuration). Character positions 00-17 and 35-39 are defined the same across all types of material, with special consideration for position 06. The definition of character positions 18-34 was done independently for each type of material, although certain data elements are defined the same in the specifications for more than one type of material. When similar data elements are defined for inclusion in field 008 for different types of material, they occupy the same field 008 character positions.

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**A****added entry**

A secondary entry to the main entry in a MARC record.

**approval plan**

An arrangement with a publisher or vendor to send materials automatically. With an approval plan, it is not necessary for the library to order each title individually, and titles that are not considered appropriate may be returned by the library. An approval plan with a vendor is usually an agreement that the library will receive current imprints selected for the library on the basis of a detailed profile.

**ASN (Advanced Shipping Notice)**

An advance shipping notice or advance ship notice (ASN) is an electronic notification of pending shipments that is provided by a supplier after an EDI order is received and processed. If the supplier has the capability to produce ASNs (X12

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transaction set 856), the Polaris EDI Agent utility retrieves the shipment information, and loads the data into Polaris. This enables users to receive materials in Polaris by scanning the tracking barcode on the outside of the carton.

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## B

### **blanket plan**

A blanket plan (also called a blanket order) is most commonly used for ordering all materials or a specific subset of materials that are published by an organization. In contrast with approval plans, blanket plans do not generally allow return privileges with simple deductions from the invoice. With blanket plans, quality is less important than comprehensiveness of coverage. Blanket plans can be as narrow as a specific publisher's series or as broad as a request to send all material of a particular type or on a particular subject.

### **blind reference**

1) An authority link (see or see also - 4xx and 5xx respectively) which points to an authority heading that does not exist in the database. 2) An authority heading (1xx) to which no bibliographic records are linked.

---

## C

### **cataloging source**

A code stored in tag 040 \$a that tells who created the record. These codes are governed by the MARC code list for libraries.

### **chronology**

The date(s) used by the publisher on a serially-issued bibliographic unit to help identify or indicate when it was published. The chronology may reflect the dates of coverage, publication, or printing.

### **content designators**

Tags, indicators, and subfield codes in a MARC record.

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**D**

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**delimiter**

A separate character used in conjunction with a subfield code and introduces each subfield in a variable field.

**deposit account**

A deposit account is an account with a vendor that allows customers to pay all or a portion of the estimated annual billing in advance. Depending on the amount prepaid, the typical discount is from 1.5% to 4.5% more than with a regular plan, where invoices are paid after the receipt of titles.

**diacritical mark**

Any of various marks, such as a macron or cedilla, added to a letter or symbol to indicate its pronunciation or to distinguish it in some way.

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**E**

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**enumeration**

The designation reflecting the alphabetic or numeric scheme used by the publisher on an item or assigned when the holdings statement is created to identify the individual bibliographic or physical parts and to show the relationship of each unit to the unit as a whole.

**express registration**

Entering patron information during the check-out process as a service to new, unregistered patrons.

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**F**

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**first available copy requests**

Hold requests for specific issues of a serial title (such as the May 2015 issue of Horticulture Magazine ) or specific parts of a multi-part title (such as the first season of a television series on DVD).

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**form subdivision**

A division of a subject heading which brings out the form of the work. For example, in the headings: Internet (Computer network) - Periodicals Library technicians - Bibliography

**free days**

A value applied at normal and bulk check-in, renewal, and offline that allows you to omit a specified number of days from the overdue fine calculation.

**G**

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**geographic qualifier**

The name of a larger geographic entity added to a local place name. For example, in the headings: Cambridge (Mass.) Toledo (Spain)

**geographic subdivision**

A subdivision which limits a topical subject heading to a specific geographic location. For example, in the headings: Women - Peru Libraries - New York (State)

**M**

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**monographic series**

A group of monographs with a collective title in addition to their individual titles. The individual titles may or may not be numbered. The collective title is generally found on the title page or the cover of each monograph.

**R**

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**RTF**

Requests-To-Fill or RTF processing sends hold requests to designated libraries in a specified order. A library chooses to fill or deny the request. The request is routed until it is filled, it expires, or every library denies it.

**RTF routing cycle**

The request-to-fill (RTF) routing cycle includes a primary and a secondary cycle defined by the Holds Routing Tables. You can enter a number of branches as responder branches, beginning with the requestor (your) branch. The cycle tries

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to fill a hold at the same branch first, and then tries to fill the hold at the next branch listed in the primary routing table. After a preset amount of time, the branches in the secondary table try to fill the hold, each in turn.

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## S

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### **SICI**

The colloquial name for Serial Item and Contribution Identifier. The SICI is the SISAC bar code. The SICI incorporates the ISSN and is used on scholarly, technical, medical and other subscription based serials.

### **SISAC**

Serials Industry Systems Advisory Committee. This committee was instrumental in creating the supporting documentation for the NISO z39.56 standard.

### **standing order**

An order placed with a vendor or the publisher directly for all publications in a series, all volumes in a set, or all publications of a single publisher.

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## T

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### **trapped**

An item is said to be trapped for a hold when an item that fills a request is scanned at circulation and the system links the item to a specific request, either automatically or by displaying a message that prompts you for a decision.



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