### What's New in Polaris<sup>®</sup> 5.0

This document summarizes what's new and different in Polaris 5.0 build 180.

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**Sources for development** Polaris development reflects customers' enhancement requests from the following sources:

- Polaris Users Group (PUG) votes
- Tracker tickets
- Workflow analysis
- Other direct customer feedback and suggestions

Additional features are prompted by new market opportunities, partnerships with other companies that serve our customers, new industry standards, and advances in the software and hardware that support library services.

Printed in the United States of America November 05, 2014 *This document is written for Polaris 5.0 build 180.*  Contents

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# New & Modified Polaris Administration/System Settings

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The following table lists the new and modified parameters, profiles, permissions, and tables in Polaris Administration. It also lists the licenses that are available for new features and the new SQL jobs.

Administration/System	Purpose	Default	Level	More Info
Acquisitions Parameters	-	-		
Automatically close purchase orders	Automatically closes purchase order by running the Close Purchase Orders SQL job.	No	System, Library, Branch	See "Automatically Close Purchase Orders" on page 5.
Cataloging Profiles				
Bibliographic records: Automatic Display in PAC processing	Prevents titles from displaying in the PAC if the linked items cannot be circulated. It an also be set to ensure that the titles do display if any linked items can be circulated. The SQL job updates the bibliographic records according to the settings in the profile.	No check boxes selected	System	See "Automatic Display in PAC Processing for Bibs" on page 7.
Cataloging Permissions	-	-		
Carousel toolkit: Access (A carousel toolkit license is also required.)	Allows users to access the Carousel toolkit from the Utilities menu	Granted to Admin group by default	System task control	See "Carousel Toolkit" on page 11.
Patron Services Parameters	5			
Floating options	A new Floating Options dialog box now includes the existing option to limit by material type with the new options to limit by collection and optionally apply load balancing.	N/A	At System level, all options can be set. At Library and Branch level, only the Collection or Title/ Material Type option can be set.	See "Floating Collection Limits & Load Balancing" on page 23.

Administration/System	Purpose	Default	Level	More Info
Associated patron options (Modified the existing parameter.)	The Associated patron options parameter now includes the option (check box) to designate the patron to pick up held items for other patrons with whom the patron is associated.	Unchecked	System, Library, Branch	See "Associated Patrons (Family) Holds Pickup" on page 19.
Renewal: Auto-renew	Enables or disables the auto- renew process.	No - Not enabled		See "Auto-Renew" on page 38. When the parameter is set to Yes, automatic renewals are completed as part of the Notices Processing SQL job.
Lost item transition	Updates the circulation status of Lost items to Missing or Withdrawn, based on a specified time period.	Do not change status	System, Library, Branch	See "Lost/Missing/ Withdrawn Automatic Process" on page 16.
Missing item transition	Updates the circulation status of Missing items to Withdrawn, based on a specified time period.	No selection	System, Library, Branch	See "Lost/Missing/ Withdrawn Automatic Process" on page 16.
Circulation Permissions		-		
Special item check-in: Access	Users with this permission can access the Special Item Check-In dialog box.	Granted to Admin group by default	Branch	See "Missing Part Check- In" on page 28.
Special item check-in: Select missing	Users with this permission (and permission to access the dialog box) can select the Missing part: block & notify option.	Granted to Admin group by default	Branch	See "Missing Part Check- In" on page 28.
Special item check-in: Select unavailable	Users with this permission (and permission to access the dialog box) can select the Mark item Unavailable option.	Granted to Admin group by default	Branch	See "Missing Part Check- In" on page 28.
PAC Profiles				
Suppress item display (modified existing PAC profile)	The Suppress Item Display dialog box now includes the <i>Claim Missing Parts</i> circulation status so that libraries can prevent items with missing parts from displaying in the PAC.	Not suppressed	System, Library, Branch	See "Missing Part Check- In" on page 28.

Administration/System	Purpose	Default	Level	More Info
Patron access options (modified existing PAC profile)	The Patron Access Options dialog box now contains options for libraries to allow patrons to choose which e- mail reminder notices they want to receive.			See "Auto-Renew" on page 38.
Self-Check Unit Parameters	5		·	•
Check-out: Item Options	Select the circulation statuses that will not patron check-outs from the self- check units.		Branch (self- check unit workstation)	See "Check Outs via SIP for Specific Item Circulation Statuses " on page 36.
Notification Parameters	1		1	
<i>Notification options</i> (modified existing parameter)	The Reminder tab includes a <i>Missing part notice</i> selection and the <i>Almost overdue</i> label was changed to <i>Almost</i> <i>overdue/Auto-renew</i> .			See "Auto-Renew" on page 38.
Server Parameters				
Renamed the server parameter URL of the ContentXChange root to URL of the ContentXChange Carousel Toolkit root.				See "Carousel Toolkit" on page 11.
Policy Tables				
Floating Collection Limits	When Collection is selected as the Limit by option for floating collections, the Floating Collection Limits sets the maximum number of items allowed to float into specific collections at the receiving branch.			See "Floating Collection Limits & Load Balancing" on page 23.
Fee Descriptions (modified table)	A new Missing Parts system- defined reason was added to the table.			See "Missing Part Check- In" on page 28.
Database Tables	-		•	•
Circulation Statuses (modified table)	The new Claim Missing Parts status was added to the table.			See "Missing Part Check- In" on page 28.
Administration Permissions				
Modify Floating Collection Limits Table: Allow	Users with this permission (and other required permissions for modifying Administration tables) can modify the Floating Collection Limits table.			See "Floating Collection Limits & Load Balancing" on page 23.

### What's New in Polaris 5.0

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Administration/System	Purpose	Default	Level	More Info
SQL Jobs	-			
Close purchase orders	Automatically closes purchase orders	Enabled, but the Automatically close purchase orders parameter must be set to Yes to run the job.		See "Automatically Close Purchase Orders" on page 5. If the parameter is set to Yes, the job runs on a default schedule of 6:59 a.m. each morning and closes the eligible purchase orders.
Lost, Missing, Withdrawn	Identifies the items that meet the criteria set in the patron services parameters, Lost item transition and Missing item transition, and updates the items. Lost items transition to either Missing or Withdrawn and Missing items transition to Withdrawn.	If either (or both) item transition parameters have been enabled, the job updates the item records according to the settings in the parameter.		See "Lost/Missing/ Withdrawn Automatic Process" on page 16.
<i>Notices Processing</i> (modified existing job)	The Notices processing job automatically renews eligible items for which the item's assigned branch has the <i>Renewal: Auto-renew</i> parameter is set to <b>Yes</b> .			See "Auto-Renew" on page 38.
CJ Chained Jobs Launcher: • CJ PAC Availability • CJ Automatic Display in PAC processing • CJ Keyword Processing • CJ DBCC Nightly	Purpose: Run a series of overnight jobs consecutively. This will eliminate the need to guess when a safe time to schedule the job to run would be. Step1: Runs CJ PAC Availability job Step2: Runs CJ Automatic display in PAC processing job Step3: Runs CJ Keyword Processing job Step4: Runs CJ DBCC Nightly			See "Overnight Processing Jobs" on page 10. The job occupies the same window that Keyword Processing used to occupy. The individual jobs and their schedules that run within this new job have been disabled. They are still available to be run individually on demand, but they will no longer run independently.
Licensed Features	•			
Carousel Toolkit				See "Carousel Toolkit" on page 11.

## Automatically Close Purchase Orders

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Polaris 5.0.31

A new Close Purchase Orders SQL job will close purchase orders automatically if the new Polaris Administration Acquisitions parameter, Automatically close purchase orders, is set to Yes. This parameter is available at the System, Library, and Branch organization levels, and it is set to No by default.



When the job runs, purchase orders are closed if: the Automatically close purchase orders parameter is set to Yes for the purchase order's Ordered at organization; the purchase order has a type of Firm, Gift or Donation; all line items have a status of Received, Cancelled or Partly Received; and all segments have a status of Cancelled or Received.

### Note:

The Close Purchase Orders job does not affect standing order or subscription purchase orders or purchase order lines that have a status of On Order, Backordered, Exceptional Condition, Never Published, Out of Print, Return Requested, Returned, Pending Claim or Claimed.

Users can continue to manually close purchase orders when the lines are received but not yet paid (still encumbered). When a user manually closes a line item, a message informs the user that one or more lines have been received, but not yet paid and provides the option for the user to select **Yes** to continue to close the purchase order or **No** to cancel the closure. With the SQL job, any eligible purchase order will be closed automatically.

### Enable the Close Purchase Order job

To enable the job that automatically closes purchase orders:

- 1. Select Administration, Explorer, and select the system, library, or branch organization for which you want to enable the Close Purchase Orders job.
- **2.** Select **Parameters**, and select the Acquisitions/Serials tab.
- **3.** Double-click the Automatically close purchase orders parameter, and select Yes.



**4.** Select **File**, **Save** to save the parameter setting.

### **Close Purchase Orders Job**

If the Automatically close purchase orders parameter is set to Yes for the organization, the Close Purchase Orders SQL job runs on a default schedule of 6:59 a.m. each morning and closes the eligible purchase orders.

### **Transactions and Transaction Subtypes**

A new **Purchase order closed** transaction was added to the database. This will include transactions where a purchase order is closed manually as well as by the new job. The following information is recorded and available in the transaction database for a **Purchase order closed** transaction:

- Supplier ID of the closed PO (SUPPLIER\_ID)
- Purchase Order number (without suffix) (PO\_NUMBER)
- Order type (ORDER\_TYPE)
- Payment method (PAYMENT\_METHOD)
- Purchase Order ID that was deleted (PURCHASE\_ORDER\_ID)
- Purchase order's Ordered At Org (Branch)
- User ID for the user who closed the purchase order or **PolarisExec** if the purchase order was closed automatically

## Automatic Display in PAC Processing for Bibs

Polaris 5.0.47

Your library can now use a new Cataloging profile in Polaris Administration to specify criteria by which an automatic processing job will suppress or display titles in the PAC (PowerPAC and Mobile PAC). This new profile, **Bibliographic records: Automatic Display in PAC**, controls the new **CJ Automatic display in PAC processing** job, which sets the **Display in PAC** check box in bibliographic records to unchecked or checked. With this automatic processing enabled, staff members no longer need to manually check or un-check the **Display in PAC** box on the Bibliographic Record workform or bulk-change records to change the check box setting.

The new CJ Automatic Display in PAC processing job is now part of a series of jobs launched by the CJ Chained Job Launcher. See "Overnight Processing Jobs" on page 10.

Once the profile is set, the job updates bibliographic records to turn off (uncheck) or turn on (check) the **Display in PAC** setting with the exception of the following types of bibliographic records, which are excluded from automatic Display in PAC processing:

- bib records with resource entities for integrated eContent vendors (regardless of whether the vendor account is active or not)
- bib records with linked serial holdings records
- bib records that are constituent records in a bound-with group

In addition, the state of linked item records is considered only for item records with a status of final; provisional or deleted items are never considered during automatic Display-in-PAC processing.

If a bibliographic record meets the criteria for an automatic change to the Display in PAC setting, manual changes to this setting are overwritten by the overnight job, provided the underlying conditions do not change. For example, if a bibliographic record meets the criteria to have the Display in PAC setting turned off because all final items are set to not display in PAC, but a staff member manually checks the **Display in PAC** check box, the automatic process will clear the check box so that the title does not display in the PAC.

# Set up automatic Display in PAC processing for bibliographic records

To set up automatic Display in PAC processing:

- 1. In the Administration Explorer tree view, expand the System folder.
- 2. Select Profiles and select the Cataloging tab.

The cataloging profiles appear.

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File Edit Help			
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P Administration Explorer - Sy	Profiles		
Administration Explorer A	Acquisitions / Serials Patron Services Cataloging PAC PowerPAC Children's PAC Staff	Client Mobile PAC C	Community
Parameters		+	+ 0 🕾
Profiles	Profile	Value	^
- Security	P Automated MARC validation: Authority	Yes	
⊕ Policy Tables	P Automated MARC validation: Bibliographic	Yes	
⊞	P Automatically sort MARC authority records	Yes	
	Automatically sort MARC bibliographic records	No	
🖶 🥻 Library	Bibliographic records: Automatic Display in PAC processing	Setup	
🖨 🚠 Branch 🗸 🗸	P Bibliographic records: Warning for records saved with display in PAC unchecked	No	$\checkmark$
A	<		>
For Help, press F1	<u>7</u>	peer	NUM

**3.** Double-click the Bibliographic records: Automatic Display in PAC processing profile.

The profile dialog box opens. By default, no check boxes are selected.

Bibliographic records: Automatic Display in PAC processing	x		
Turn OFF the bibliographic 'Display in PAC':			
if there are no final linked item records			
if there ARE final linked item records and:			
Display in PAC' is off on all final linked item records			
the circulation status is suppressed on all final linked item records			
Turn ON the bibliographic 'Display in PAC' if the conditions above are NOT met.			
OK Cancel Help			

- To suppress the display of bibliographic records based on the state of their linked item records, select the Turn OFF the bibliographic 'Display in PAC' check box and select from the following options:
  - if there are no final linked item records When this option is selected, the job looks for bibliographic records that have the Display in PAC box checked but have no linked item records with a status of Final. If it finds such bibliographic records, it clears (un-checks) the Display in PAC check box, and those titles will not display in the PAC.
  - if there ARE final linked item records and:

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**Display in PAC is off on all final linked item records -** When this option is selected, the job looks for bibliographic records that have the **Display in PAC** box checked but all the final linked item records have the **Display in PAC** box unchecked. If it finds such bibliographic records, it clears (un-checks) the **Display in PAC** check box in the bibliographic records, and those titles will not display in the PAC.

the circulation status is suppressed on all final linked item records - When this option is selected, the job looks for bibliographic records that have the **Display in PAC** box checked but all final linked item records have circulation statuses that prevent the items from displaying in PAC. If it finds such bibliographic records, it clears (un-checks) the **Display in PAC** check box in the bibliographic records, and those titles will not display in the PAC.

### Note:

This option uses the  $\ensuremath{\textbf{Suppress}}$  item display PAC profile table for the item's assigned branch

5. To ensure that bibliographic records display in the PAC if the linked item records are in a state where they can be circulated, select Turn ON the bibliographic 'Display in PAC' if the conditions above are NOT met. When this option is selected, the job looks for any bibliographic records that do not already have the Display in PAC box checked, and whose linked items do not collectively meet the criteria selected under the Turn OFF Display in PAC setting. If it finds such bibliographic records, it checks the Display in PAC check box, and those titles will display in the PAC.

### Note:

If your library has non-integrated eContent titles that you want to display in PAC even though they do not have linked item records, do not select the following options: **Turn OFF the bibliographic 'Display in PAC'** and **if there are no final linked item records.** 

When a bibliographic record is updated by the **Automatic display in PAC processing** job, the transaction is logged and the modifier and date last modified fields reflect these changes.

### Tip:

To identify bibliographic records that were modified by the job, you can search for bibliographic records that were modified during the overnight window when the job ran.

### **Overnight Processing Jobs**

Polaris 5.0.47

A new CJ Chained Job Launcher job now runs a series of overnight jobs consecutively. The jobs in this series are prefaced with CJ (Chained Jobs), and they are run in the following order:

- **1.** CJ PAC Availability
- 2. CJ Automatic Display in PAC Processing
- 3. CJ Keyword Processing
- **4.** CJ DBCC Nightly

The CJ Chained Job Launcher job occupies the same window that the Keyword Processing job used to occupy. The individual jobs and their schedules that run within this new job have been disabled. They are still available to be run individually on demand.

### **Carousel Toolkit**

Polaris 5.0.58

With the Carousel Toolkit, libraries can copy a code "snippet" for a content carousel from the Polaris ILS and paste the code into an external web site to display the content carousel. When users visit the web site and click the content carousel, the search results page displays in PowerPAC (via a deep link). Each branch can have a content carousel that points to its own PAC configuration.

The Carousel Toolkit provides the code for content carousels from a bibliographic record set or from one of the following system-supplied automatic web parts (dashboard elements):

- Book Sense best seller lists
- New Books
- New Large Print
- New Sound Recordings
- New Videos
- Most Circulated Titles
- On Order Titles

The Carousel Toolkit is a licensed feature. It is licensed at the system level; branches that do not want to use the feature can manage access to the feature through permissions.

This development includes the following:

• New option on the Utilities menu - The Utilities menu includes a new Carousel Toolkit selection.

Polaris ILS [Comm	inity Library]	×
Polaris ILS [Comm         File       Acquisitions       Serials       Cataloging       Patron Services       Circulation       Administration         Image: Comm       Image: Cataloging       Patron Services       Circulation       Administration         Image: Comm       Image: Cataloging       Patron Services       Circulation       Administration         Image: Cataloging       Image: Cataloging       Image: Cataloging       Image: Cataloging       Image: Cataloging       Image: Cataloging         Image: Cataloging <td>Inity Library] Utilities Window Help Reports and Notices Importing Exporting Cataloging Processing Quick-circ Item Records Acquisitions Processing Label Manager Mailing Label Manager Credit Card Payments Manager URL Detective</td> <td></td>	Inity Library] Utilities Window Help Reports and Notices Importing Exporting Cataloging Processing Quick-circ Item Records Acquisitions Processing Label Manager Mailing Label Manager Credit Card Payments Manager URL Detective	
	Carousel Toolkit	

- New Cataloging permission To use the Carousel Toolkit, staff members must be assigned the Access Carousel Toolkit: Allow permission.
- Renamed server parameter in Polaris Administration URL of the ContentXChange root was changed to URL of the ContentXChange/ Carousel Toolkit root.

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P Administration Explorer - System		Parameters		
QA-QUANTUM     QA-QUANTUM     Control of the second s	^	PAC		]
	U	Parameter	Value	
		Network name of application server (MTS)	QA-QUANTUM	
	1	INT domain that application server resides in	GIS	
		INT password used with SVRAPPLICATIONNTACCOUNT	guest	
E.		NT user account for access to MTS	guest	
Ē.		PAC default organization for session	QA-Quantum 5.0	
Ē		Server IP of application server (MTS)	QA-QUANTUM	
		SSL: Enable: Mobile PAC	Yes	
E		SSL: Enable: PowerPAC	Yes	
E E		URL of the ContentXChange/Carousel Toolkit root	http://QA-QUANTUM.polarislibrary.com/ContentXChange/	
Ē.		URL of the Mobile PAC's root	https://QA-QUANTUM.polarislibrary.com/mobile/	
<pre></pre>	*	URL of the PowerPAC's root (Example: http://127.127.127	http://QA-QUANTUM.polarislibrary.com/polaris/	
For Help, press F1			다. peer NUM	

When carousel code snippets are pasted into external web sites, the content carousel is displayed on the web site. Users can click on a title in the carousel to go to the search results page at the branch (or system) connection specified in the Carousel Toolkit dialog box.

To display cover images in content carousels, enriched data must be set up in Polaris Administration. If cover images are not enabled in Administration, the carousels display the format icons and bibliographic information, but no cover images.

## Generate and copy the code for a record set or dashboard element

The Carousel Toolkit license must be enabled, and the user must have the Access Carousel Toolkit: Allow permission.

To generate and copy the content carousel code for a record set or dashboard element.

1. Select Utilities, Carousel Toolkit.



The Carousel Toolkit dialog box opens.

	Carousel Toolkit	
arousel Options		
O Create from record set	Create from Dashboard element	
Children's Illustrated		
Children's Interest		
Hardcover Fiction		
Hardcover Non-Fiction		
Mass Market		
Most Circulated Titles	×	
Get iframe code	Get source code	
AC context		
Community Library		~
ode		
Copy to clipboard	Preview	
	Class	

### Tip:

If the record set is modified after it is selected in the carousel toolkit, it can still be selected for the carousel.

- **2.** Select one of the following options to create the content carousel:
  - **Create from record set** Click **Find**. The Find Tool opens with bibliographic record set selected. Search for and select the record set.

			Carousel Toolkit				-	
Carousel Opt	ons s from record set O Creati ind button to search a record set	e from Dashl	poard element	Find				
) General See Object: Search by: Type: Sort by: For:	Catalogin ools Options Help ttings Record Sets Name Exact match (implicitly truncated) (None)	Limit by:     Values:     Values:	I Sets - Name Find Tool: Type Bibliographic	2	Search Mode Normal Power SQL Count Only	Search Stop New Search Clear Help		~
or Help, press	; F1		(	Close on S	Select			

• **Create from Dashboard element -** Select a single dashboard element from the list.

	Carousel Toolkit	
arousel Options		
Create from record set	Create from Dashboard element	
Children's Illustrated	^	
Children's Interest		
Hardcover Fiction Hardcover Non-Fiction		
Mass Market		
Most Circulated Titles	~	
Get iframe code	Get source code	
C context		
Community Library		V
de		

**3.** If you want to change the PAC connection branch where users will go when they click on a title in the carousel, select a different branch in the PAC context drop-down list.

P.	AC context	
	Community Library	*

#### Note:

The **PAC context** box displays the branch for your user login, but you can select another branch or the system. The drop-down list contains the system PAC connection and all branches that are not suppressed in the system-level PAC profile setting **Suppress branches**.

- **4.** After selecting the record set or dashboard element, select one of these options:
  - Get iframe code The iframe code is displayed in the Code box.

Co	de	
	<pre>height="350px"&gt;</pre>	polarislibrary.com/ContentXChange/Carousel/25/47116/2" width="758px" frameborder="0"
	Copy to clipboard	Preview

• Get source code - The source code is displayed in the Code box.

Code		
html PUBLIC "-//W3C//DTD HT</td <th>ML 4.01 Transitional//EN" "http://www.w3.org/TR/html4/loose.dtd" &gt;</th> <td>A</td>	ML 4.01 Transitional//EN" "http://www.w3.org/TR/html4/loose.dtd" >	A
html xmlns="http://www.w3.org/1999/xhtml"	>	
<head></head>		
cmeta name="vs_defaultClientScript" content= cmeta http-equiv="X-UA-Compatible" content= cscript src="http://QA-QUANTUM.polarislibran cscript src="http://QA-QUANTUM.polarislibran	"JavaScript" /> "IE=Edge" />] .com/ContentXChange/scripts/Iquery-1.4.2.min js" type="text/javascript"> .com/ContentXChange/scripts/Ittlejs" type="text/javascript"> .com/ContentXChange/scripts/Ittlejs" type="text/javascript">	~
Copy to clipboard	Preview	

**5.** To see how the content carousel will look in the web page, click **Preview**. To see the preview, a browser must be installed and accessible on the workstation.

- **6.** When the source code or iframe code is displayed in the Code box, click Copy to clipboard.
- **7.** Paste the code snippet into the code for a web page.

The content carousel is displayed in the web page.



When a user selects a title in the content carousel, the title is displayed in the Polaris PowerPAC for the branch (or the system) selected in the **PAC context** box.

		Community Library	
	LIBRARY INFO V	SEARCH V COMMUNITY V MY ACCOUNT V HELP V	
Save Search Related searches	Keyword search for: Search by: Limit by:	482596 × Gol Any Field v Using: Local Polaris PAC DB v All Items - All Libraries v Select Databases	
▼ Subjects		More Search Options	
Bildungsromans.     Immigrants     New York (N Y)     Russian Americans     Young men <b>Authors</b> Shteyngart, Gary, 1972- <b>Other Searches</b> Any Field Search     Title Search     Author Search     Subject Search     General Notes Search     Genera Notes Search     Genera Search     Series Search	1-1 of 1 see reviews/add a review; 12 reviews (***)	1. The Russian debutante's handbook by Shteyngart, Gary, 1972- Publisher, Date: New York : Riverhead Books, 2002. Description: 452 p. ; 24 cm.	Page: [1] ilability Display Request

## Lost/Missing/Withdrawn Automatic Process

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Polaris 5.0.66

Libraries can now set patron services parameters to automatically update the circulation status of lost or missing items based on a specified period of time. These new patron services parameters are available at the System, Library, or Branch level in Polaris Administration. Item records are updated (or not) according to the settings for the item's assigned branch.

Acquisitions / Serials	Patron Services	Cataloging	PAC	Notification	SelfCheck Unit	Request	Credit Card Payment	NCIP		
Parameter				Valu	e					
Express patron r	egistration optio	ns		Setu	p					
Fine and loan performed and loan performed and loan performance.	eriod defaults			Setu	p					
Fine receipt opti	ons			Setu	p					
P Fine receipts: Pr	int duplicate rece	eipt		No						
Floating options	;			Setu	p					
뤒 Free days bulk				0 da	y(s)					
뤒 Free days norma	al			0 da	y(s)					
Hold slip option	s			Setu	p					
📥 Holds call slip: E	nable			Yes						
💾 Holds pickup sli	p options:			Setu	p					
Holds: Item pick	up branches			Setu	p					
Hours of operat	ion			IOM	NCLOSED, TUE10	30-2000, V	VED1030-1800, THU10	30-1800, F	FRI1030-1800, SAT 1000	)
🛗 In-transit slip op	tions			Setu	p					
Items out receip	t options			Setu	p					
P Last use patron	display			Yes						
Lost item charge	e options			Setu	p					
Lost item recove	ery			Setu	p					
Lost item transit	ion			Setu	p					
Material type gr	oups			Setu	p					
Missing item tra	nsition			Setu	p					

When the Lost item transition or Missing item transition processing has been enabled, the Lost Missing Withdrawn Processing SQL job identifies items that meet the criteria specified in the applicable parameter and updates the items as follows:

- Lost items transition to either Missing or Withdrawn
- Missing items transition to Withdrawn

### Note:

The first time the job runs, processing may take some time because all the item records that have retained a Lost status for longer than specified in the **Lost item transition** parameter, and all the items that have retained a Missing status for longer than specified in the **Missing item transition** parameter are included in the processing. When determining if a particular item should be updated automatically, the day on which the job is run is not included.

### Set up lost item transition to missing or withdrawn

#### Note:

Libraries in a consortium will need to consider whether to implement the automatic transition of Lost items because the items will be assigned the new status without regard to Lost item recovery settings for the Governing library.

To enable lost item transition processing:

- 1. Select Administration, Explorer, and select System, Library or Branch.
- **2.** Select **Parameters**, and select the **Patron Services** tab.
- **3.** Select **Lost item transition** in the list of parameters.
- **4.** The Lost item transition dialog box opens. The **Do not change status** option is selected by default.

	Lost item transition [QA-Quantum 5.0 (sys)]
s	ettings defined at: 📲 QA-Quantum 5.0 (sys)
м	love lost items to:
	○ Missing
	○ Withdrawn
	Do not change status
A	fter:
	Charge accruing overdues
	OK Cancel Help

- 5. Select Missing or Withdrawn.
- **6.** Specify the time period after which Lost items will be updated to either Missing or Withdrawn by selecting a number and Months or Years.

#### **Recommendation:** The transition period set by the Assigned Branch should be longer than any of the lost-and-paid recovery periods set within the library system. This reduces the likelihood of an item being recovered after it has received a Withdrawn status.

- **7.** If you want to charge accruing overdues to the patron's account, select **Charge accruing overdues**.
- 8. Select OK.

### Lost item transition processing

When an item transitions from Lost, the following updates are made to the item record:

- The circulation status changes from Lost to Missing or Withdrawn.
- The status reflects the date and time of the change.
- The item is removed from the Patron Status workform, Claims view.

- If the item is lost and not paid, the charge remains on the patron's account.
- If the item is lost and paid, no lost-item-recovery options, such as crediting the patron's account, are applied.
- If Charge accruing overdues is selected, the charges are added to the patron account.
- The item record history displays: Circulation status modified via Lost Item Transition processing Automatic status change.

### Set up missing item transition to withdrawn

To enable missing item transition processing:

- 1. Select Administration, Explorer, and select System, Library or Branch.
- 2. Select Parameters, and select the Patron Services tab.
- **3.** Select Missing item transition in the list of parameters.
- **4.** The Missing item transition dialog box opens.



- 5. Select Move missing items to withdrawn.
- **6.** Specify the time period after which Missing items will be updated to Withdrawn by selecting a number and Months or Years.
- 7. Select OK.

### Missing item transition processing

When an item transitions from Missing to Withdrawn, the following updates are made to the item record:

- The circulation status changes from Missing or Withdrawn.
- The status reflects the date and time of the change.
- The item record history displays: Circulation status modified via Missing Item Transition processing Automatic status change.
- Other item data, including the last borrower, remain.

# Associated Patrons (Family) Holds Pickup

Polaris 5.0.71

Libraries that use associated patron groups can now designate a member (or members) of the group who can pick up items held for other members of the group, and then check out these items using their own library cards. When the item is picked up and checked out by the designated member of the associated group, the hold is deleted from the account for the patron who placed the hold, and the holds list indicates the item was picked up by another member of the group.

A new check box, Always check 'Allow me to pick up holds for these patrons' by default, was added to the Associated Patron Options parameter in Polaris Administration so that the organization (system, library, or branch) can specify the default setting for associated patrons. Staff members with the appropriate set of permissions can modify an association to change the default setting.

A new Find Tool Limit by option, Has patron associations, is available when searching for patron records. Select Yes to find patron records with associations.

Patron Reco	rds - Patron's registered library Find Tool	- 🗆 🗙
File Edit Tools Options Help General Settings Object: Patron Records	Umit by: Has patron associations	de Search
Search by: Patron's registered library Type: Exact match (implicitly truncated)	Values: (Al)     Owrmal     Ower     Ves     No     SQL     SqL	Stop New Search
Sort by: (None) For: *	v Count on	Help
For Help, press F1	Stay on Select	

# Specify the default for picking up held items for associated patrons

To specify your library organization's default setting for allowing patrons to pick up held items for their associated patrons:

- **1.** Select Administration, Explorer, and select the system, library, or branch organization for which you want to specify the default setting.
- **2.** Select **Parameters**, and select the Patron Services tab.

The patron services parameters are listed in the details view.

**3.** Double-click the Associated patron options parameter to open the dialog box.

	Associated Patron Options [Community Library (br)]						
Retrieved from: 🛕	Retrieved from: 🛕 Community Library (br)						
Options							
Linked record limit:	Linked record limit:						
	Always check "Allow me to pick up holds for these patrons" by default						
	OK Cancel Help						

4. Select (or clear) the Always check 'Allow me to pick up holds for these patrons' by default check box.

If this box is checked, the Allow me to pick up holds for these patrons box is checked by default on the Add Associations and Edit Associations dialog boxes. Staff members with the appropriate permissions can change the setting when adding or editing a patron association.

You can add multiple patrons and apply the current setting to all the associated patrons. When you edit an association, the setting is applied to the associated patron displayed in the Edit Association dialog box.

#### Note:

When you add associated patrons to a patron record and check the **Allow me to pick up holds for these patrons** check box, only the primary patron, whose record is displayed in the Patron Status workform, is permitted to pick up held items for the associated patrons. For example, the primary patron is the mother who has a son and daughter for whom she can pick up held items. The son and daughter cannot pick up held items for their mother or for each other.

To set up associations where patrons can pick up held items for each other, do the following for each member of the group: open the Patron Status workform, add the other associated patrons, and check the Allow me to pick up holds for these patrons.

Add As	sociations
Associated Patron(s):	ind Note:
1001900123289 : Genie R Ozolins 1001900122877 : Rebekah E Palotico	
Block me if these patron records are blocked.	
Allow me to pick up holds for these patrons.	
ОК СА	ancel Help

	Edit Associati	ion 🎴
Associated Patron(s):	Find	Note:
1001900162725 : Brandon S Surento		
Block me if these patron records are block	xed.	
ОК	Cancel	Help

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The Associations view of the Patron Status workform includes a new column that displays **Yes** if the patron is allowed to pick up and check out held items for associated patrons.



The Associated Patrons linked list box also includes a new column that displays **Yes** if the patron is allowed to pick up and check out held items for associated patrons.

P	Patron Record	208972: Associated Patro	n Records		>		
File Edit Help							
Patron Record 208972: Associated Patron Records       - □ ×         ie Edit Help       ie Edit Help         ie Torn Barcode       Patron Name         Barach       Note         Block Me       Allow Me         001900122877       Rebekah E Falctico         Community Library       Yes         00190012289       Genie R Ozolins         Community Library       Yes         001900162725       Brandon S Surento         Community Library       Yes         Ves       Yes							
Patron Barcode	Patron Barcode Patron Name Branch Note Block Me 🖌						
1001900122877	Rebekah E Falotico	Community Library			Yes		
1001900123289	Genie R Ozolins	Community Library			Yes		
1001900162725	Brandon S Surento	Community Library			Yes		
or Help, press F1			3 records				

For primary patrons who are designated as allowed to pick up held items for other associated patrons, the following circulation processing occurs:

- The primary patron can use his or her own library card to check out the items held for other associated patrons.
- When the primary patron checks out an item for an associated patron, the item is checked out to the current (primary) patron, not the associated patron for whom the hold was placed.
- For offline check outs, when the primary patron checks out an item for an associated patron, the following message is included in the offline processing report: This item satisfies a hold request for associated patron [barcode, last name, first name, middle initial].
- When the primary patron checks out an item for an associated patron using Polaris Express Check (or a self-check unit that communicates via SIP or NCIP), the item is checked out to the primary patron without an additional message.
- The hold request is deleted from the associated patron's account (except in the case where the request status **Out to patron** is enabled in Polaris Administration).
- The item history shows that the item was checked out to the current patron who is authorized to pick up holds for the associated patron.

			Item Record 1	626959 - Circulat	ion History - Po	olaris		- 🗆 🗙
File Ec	dit View Linl	cs Tools Help						
$\square$	🚅 🔒	🖶 - 🗙 🕅 🛛	<b>J</b> 🗗 🖸	🖺 🕰 🏅	1 1	8 1		
P	Barcode:	0001900075258	Record status:	Final	ILL	Content	Non-circulating	✓ Display in PAC
20	Title:	Little house in the big woods				Find	Bib control number:	4567
Ŭ,	Author:	Wilder, Laura Ingalls, 1867-1	957.		Parent item:		Item control number:	1626959
Ř	Call number:	j Fict Wil			Price:	\$16.95	Issue control no.:	
E L	Owner:	Community Library (br)		~	Shelf location:	(None)		~
Ite	Assigned:	Community Library (COB)		~	Temporary location	n:		
æ	Collection:	Children's Fiction (JF)		~	Circulation status:	Out	∨ 7/14/2014	4 6:06:24 PM
3	Home bran	ch: Community Library (C	DB)		~		Do no	t float
	History							
2	Date	Assigned Bra	anch Status	Action		Locatio	on User/Wi	(S PatronID
5	7/14/2014 6:	:06:24 PM Community I	ibrary Held -> Out	Checked	out by associated pa	atron Commu	unity Library peer/Pe	er 208972
	7/14/2014 6:	:02:15 PM Community I :02:14 PM Community I	ibrary Held ibrary Out->Held	At Comn Checked	in	Commu Commu	unity Library peer/Pe unity Library peer/Pe	er 1834/6 er 344008

- The item is added to the primary patron's list of checked out items.
- All renewals, notices, overdues etc. are linked to the patron who checked out the item for the associated patron.

# Floating Collection Limits & Load Balancing

Polaris 5.0.79

Branches that participate in floating collections can now set limits on the number of items allowed to float. When a user checks in an item that is eligible to float into a receiving branch's collection, the collection limit is checked. The item will be checked in if it does not exceed the limit on the number of In items (with a record status of Final) in that collection.

To apply floating limits by collection, open the new Patron Services Floating options parameter at the System level and select Collection. If Collection is selected, you can also select Load balancing. See "Collection Load Balancing" on page 24.

Floating Options [QA-Quantum (sys)]
Settings defined at: 🏯 QA-Quantum 5.0
✓ Floating enabled
Limit by
○ Title/Material type
Default collection limit:
Load balancing
Float items with no matching collection
✓ Float items with no collection
✓ Prompt for additional floating items
OK Cancel Help

At the Branch level, the Floating Options dialog displays the Limit by option selected at the System level.

Example with load balancing disabled at the System level.

Floating Options [COB (br)]
Settings defined at: 🚔 QA-Quantum 5.0
✓ Floating enabled
Limit by
Collection (load balancing is disabled)
Default collection limit:
Float items with no matching collection
✓ Float items with no collection
Prompt for additional floating items
OK Cancel Help

Example with load balancing enabled at the System level.

Floating Options [COB (br)]
Settings defined at: 🛃 QA-Quantum 5.0
✓ Floating enabled Limit by Collection (load balancing is enabled)
Default collection limit: 0
OK Cancel Help

When **Collection** is selected as the **Limit by** option for floating collections, you can specify the limits for specific collections using the new **Floating**: **Collection Limits** policy table, which is available at the system, library, or branch level in Polaris Administration. The columns display the received branch (the check-in branch), the collection, and the maximum In item limit (number of final items with a circulation status of In) for that collection.

P Administ	ration Explorer - System - QA-	Quantum 5.0 - Polaris		×
File Edit Help				
P Administration Explorer - System	Hoating: Collection Limits		~	$\overline{\ }$
Fine Codes     Fines     Fines	M a ×   + + ™	T		
Floating: Collection Limits     Material Types	Received Branch	Collection	Maximum In Item Limit	^
Floating: Material Type Limits	Community Library	Adirondack Collection	500	
	Community Library	Adult Magazines	500	
Holds Routing Sequences Primary	Community Library	Adult Nonfiction	500	
Initial Articles	Community Library	Adult Reference	500	
tem Availability Display Order	Community Library	Adult Spanish	500	
tem Statistical Class Codes	Community Library	African American	500	
Link to Supplier Databases	Community Library	Art Books	500	
I Loan Period Codes	Community Library	Audiovisual	500	
MARC Language Scoping Display	💼 Community Library	Biographies	500	
Material Types	Community Library	Book Express	500	
<	Community Library	Business	500	y
For Help, press F1	, -	204 row(s)	geer NUM	

The new permission Modify Floating Collection Limits Table: Allow is required to modify this table.

### **Collection Load Balancing**

If the Limit by Collection option is selected on the Floating Options dialog box, you can also select Load balancing. Load balancing is available at the system level only, so all branches that use floating collections must agree to either enable load balancing or not.

When load balancing is enabled, and an item cannot float into the receiving branch because it would exceed that branch's collection limit, the system checks all eligible receiving branches that participate in floating collections. The item will float to the branch that has the lowest ratio of the number of items to the collection limit. If no eligible branches are found, or two or more branches' collections have the same ratio of the number of In items to the collection limit, the item is returned to its assigned branch.

The following options can be selected when either Limit by option is selected (Title/Material type or Collection), but they are not available if Load balancing is selected:

- Float items with no matching collection
- Float items with no collection

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• Prompt for additional floating items

### Set floating limits by collection

To set up floating limits by collection for the library system:

### Note:

At the System level, your library can use the Floating Options parameter to define floating limits by the maximum number of In items attached to the same bibliographic record for each material type, or by the number of In items in a collection. If **Title/Material** type is selected, the limits are set for the receiving branches using the Floating: Material Type Limits policy table. If **Collection** is selected, the limits are set for the receiving branches using the Floating: Collection Limits policy table.

- 1. In the Administration Explorer, select System, Parameters, and select the Patron Services tab.
- **2.** Double-click Floating options.

P	Administration Explorer -	System - QA-Quan	tum 5.0 - Polaris			×	
File Edit Help							
🗅 • 🚅 • 日 🗡	( P 🔽						
P Administration Explorer - System	Parameters						
Administration Explorer - System	SelfCheck Unit	Request	Credit Card P	Credit Card Payment		NCIP	
Parameters	Acquisitions / Serials	Patron Services	Cataloging	PAC	Notific	ation	
Profiles				+	+ 6	P	
- 🔒 Security	Parameter		Value			^	
Policy Tables	End-of-term due date op	tions	Setup				
Notification Tables	EReceipt options	Setup					
	Express patron registratio	Setup					
🗄 🖞 Library	Fine and loan period defa	Setup	Setup Setup				
	Fine receipt options	Setup					
Workstation	P Fine receipts: Print duplic	ate receipt	No			_	
Staff Member	Floating options		Setup				
😰 Patron	💑 Free days bulk	0 day(s)					
	🔒 Free days normal		0 day(s)			~	
< >	<					>	
For Help, press F1	*			17 <mark>9</mark>	peer	N.,	

The Floating Options dialog box opens.

Floating Options [QA-Quantum (sys)]	×
Settings defined at: 🚔 QA-Quantum 5.0	
✓ Floating enabled	
Limit by	
Title/Material type     O Collection	
Default collection limit: 5	
Load balancing	
Float items with no matching collection	
Float items with no collection	
✓ Prompt for additional floating items	
OK Cancel Help	

- **3.** Select **Floating enabled** if it is not already selected.
- **4.** Select **Collection** under **Limit by**.
- **5.** Select a number to define the default limit for the number of In items that the collections can have in the **Default collection limit** box.

### Note:

A value of **0** means no items can float into the collection.

**6.** To apply load balancing, select the **Load balancing** check box.

When Load balancing is selected, the additional check box options are not displayed.

Float	ing Options [QA-Quantum (sys)]					
Settings defined at:	A QA-Quantum 5.0					
✓ Floating enabled						
Limit by						
◯ Title/Mate	rial type   Collection					
	Default collection limit: 0					
	✓ Load balancing					
	Cancel Help					

**7.** Select **OK** to save the settings and close the dialog box.

# Limit the number of floating items a branch can receive for a collection

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To set limits on the number of items that can be checked in for a floating collection:

- 1. In the Administration Explorer, select the System, Library or Branch.
- 2. Open the Policy Tables folder, and select Floating: Collection Limits.

The Floating: Collection Limits table is displayed in the details view.



- **3.** Select the collection for which you want to change the receiving branch's limits.
- 4. Click

The Modify box opens.

Modify :	Floating: Collection Limits - Community Library
Received Branch:	Community Library V
Collection:	Adult Magazines 🗸
Maximum In Item Limit:	500
	OK Cancel Help

- **5.** Change the collection limit as appropriate, and click **OK**. The Modify box closes.
- **6.** Select **File**, **Save** to save the policy table.

# **Missing Part Check-In**

Polaris now includes new options for items, such as DVD or CD sets, that are returned with missing parts. With this development, staff members can manage these items whether the missing parts are discovered before or after the item is checked in. A staff member checking in multi-part items is likely to discover the missing parts while the item still has a status of **Out**. But, if the library uses automated materials handling (AMH) units, a staff member may discover that parts are missing after the item has been checked in by the AMH and has a status of **In**.

This development includes the following:

• The Special Item Check-In dialog box, which opens when an authorized staff member selects Special Item Check-in from the Tools menu on the Check-In workform.



rcode:		Find		
Barcode	Status	Title	Material Type	Patron
) Missing part	t: block & notify			
Missing part	t: block & notify n <b>check-in note (will a</b> j	ppear on the patron noti	e and on the item rec	ord):
Missing part	t: block & notify n check-in note (will aj	ppear on the patron not	e and on the item rec	ord):

Authorized staff members can use this dialog box to scan the item's barcode or search for the item with the missing part, and then update the item record's status by selecting one of the following options:

• Missing part: block & notify - Selecting this option updates the item's status to Claim Missing Parts; blocks the item from being circulated; moves the item to the Patron Status workform, Claims view; generates a notice to the patron; and includes the special item check-in note (if entered) on the patron notice and the Item Record workform. If the item's status is still **Out**, the notice is sent to the current borrower. If the item's status is In, the notice is sent to the last borrower. (If the last borrower is not available for an In item, a message appears and the item is not added to the dialog box.)

- Mark item Unavailable Selecting this option updates the item to Unavailable, which prevents the item from being circulated.
- New Circulation permissions:
  - **Special item check-in: Access** Users with this permission can access the Special Item Check-In dialog box.
  - Special item check-in: Select missing Users with this permission can select the Missing part: block & notify option on the Special Check-In dialog box.
  - Special item check-in: Select unavailable Users with this permission can select the Mark item Unavailable option on the Special Check-In dialog box.



• A new Claim Missing Parts status was added to the Circulation Statuses database table in Polaris Administration. The status description can be modified.

Circulation Statuses							
" a × + +	<b>1</b>						
Description	Name						
👌 In	In						
뤒 Out	Out						
📥 Out-III	Out-III						
📥 Held	Held						
뤒 Transferred	Transferred						
📥 In-Transit	In-Transit						
📥 Lost	Lost						
뤒 Claim Returned	Claim Returned						
뤒 Claim Never Had	Claim Never Had						
뤒 Missing	Missing						
뤒 Withdrawn	Withdrawn						
뤒 Bindery	Bindery						
뤒 On-Order	On-Order						
뤒 In-Repair	In-Repair						
뤒 In-Process	In-Process						
뤒 Unavailable	Unavailable						
뤒 Returned-ILL	Returned-ILL						
뤒 Routed	Routed						
뤒 Shelving	Shelving						
A Non-circulating	Non-circulating						
뤒 Claim Missing Parts	Claim Missing Parts						

• The Claim Missing Parts status displays in the Item Record workform for items with missing parts.

Ξ	Item Record 3712	204 - Circulation - Polaris	5		- 🗆 🗙
File Edit View Links Tools Help					
🗋 🚅 🖥 🖶 🖉 🗙 🕅	🗗 🚺 🖸 🛄 4	🖻 <u> </u> 🧃 🚠	r 🗘		
Barcode: 0000402584064	Record status: Final	ILL B	Content No	n-circulating [	<ul> <li>Display in PAC</li> </ul>
Title: Beauty : a retelling of t	ne story of Beauty & the beast		Find Bib o	ontrol number:	2858
Author: McKinley, Robin		Parent item:	Item o	control number:	371204
Call number: YA Fict McK c.4		Price:	\$20.00 Issue	control no.:	
Owner: Rotterdam Branch - Sc	henectady County Public Libra (br)	<ul> <li>Shelf location:</li> </ul>	(None)		~
Assigned: Rotterdam Branch - Sc	henectady County Public Libra (ROT)	<ul> <li>Temporary location</li> </ul>	n:		
Collection: Young Adult Fiction (Ya	AF)	Circulation status:	Claim Missing Parts		:54:05 AM
Jue date:	Ourrent herrowers		In-transit/Trans	ferred	
	Loaning branch:		Prom:		
Check-out date:			Sent		
Renewals taken: 0 Limi	t 1		John		
	Held for patron:		To:		
Last renew date:	Held at:				
Original due date:			Received:		
Last location	Last use				
Check-in at: Rotterdam Branch - S County Public Libra	chenectady Last borrower:	31119873			
county ruble bord	Loaning branch:	Rotterdam Branch - Schenectad	У		
Date: 9/10/2014 7:54:05 A	м				
Wks/User: Phelps-W8/marycay.	bhelps Last circulated:	8/25/2014 11:16:17 AM			
For Help, press F1					NUM

• The **Claim missing parts status** can be used to find item records when searching by Circulation status.

Item Records - Circulation status Find Tool		- U ×
ile Edit Tools Options Help		
General Settings Scoping Branches Collections Databases		
Object: Item Records V Limit by: (None) V	Search Mode	Search
Search by: Circulation status Value:	Normal     OPower	Stop
Type: Exact match (implicitly truncated)	⊖ sql	New Search
Sort by: (None) 🗸	Count Only	Clear
For: Claim missing parts v		Help

When the item is updated using the Special Item Check-In dialog box, the item does not go in transit, no floating processing occurs, and the assigned branch does not change. workform. Staff can select the item with the claim type **Claim Missing Parts** and charge the patron for the missing parts if the item is salvageable, or declare the item lost if the missing part cannot be recovered and the entire set must be removed from circulation (un-salvageable):

• Missing parts will appear on the Claims view of the Patron Status

• To charge the patron for the missing part, select the Check In/

Charge button to open the Charge for missing parts dialog box. Enter the amount of the charge, select the reason, and enter any applicable notes.

					<u>5</u> 5 ⊠	
Item Barcode	Title		Claim Date	Due Date	Claim Type	Note
000402584064	Beauty : a retelling	g of the story of Beauty &	9/10/2014 7:5	9/22/2014	Claim Missing Parts	
		Charge for miss	ing parts		×	
	Amount:	\$0.00 Reason	1:	Ŷ	•	
	Associated item:	0000402584064		Find		
	Notes:					
Claims						
Total · 0	0	OK	Cancel	Help		

• To declare the item lost, select the Declare Lost button it to open the Declare lost item dialog box. Enter information for the unsalvageable item.

### Tip:

You can select an item with any

claim type and select with to declare the item lost from the Claims view.

	Declar	e lost item	
Item barcode:	0000410927685		Bille
Title:	Alien quadrilogy	[DVD]	
Due date:			
Billed date:			
Patron barcode:	122919540926		
Name:	Alexandria Lee R	emey	
Fine			
Total:	\$79.99		
	Replacement:	Processing:	Overdue:
Charge:	\$79.99	\$0.00	\$0.00
Paid:	\$0.00	\$0.00	\$0.00
Waived:	\$0.00	\$0.00	\$0.00
Amount due:	\$79.99	\$0.00	\$0.00
Amount:	\$79.99	\$0.00	\$0.00
Actions:	~	Leave as is 🛛 🗸	Leave as is

• A new Missing Parts system-defined reason was added to the Fee Descriptions policy table in Polaris Administration.

	Fee Description
4	Missing Parts
4	Check Out Charge
2	Borrow By Mail Charge
å	Patron Registration Fee
2	Polaris Fusion Purchase
4	Credit Card Processing Charge
4	Processing Charge
4	Overpayment
å	Credit Refund
2	Hold Request
4	Collection Agency
4	Replacement Cost
4	Overdue Item
å	Case / Cover
2	Copy / Print
4	Damage
2	ILL
å	Manual Fine
å	New Card
å	Phone / Fax
4	Postage
å	Rental
0	

• Claim Missing Parts was added to the Holds options dialog box on the Requests tab to prevent holds on items with missing parts.

				Manage item requests		
<ul> <li>Enabl</li> </ul>	e title-level hold requests from Powe	erPAC and Mobile PAC	2	O Do not allow item requests from PAC		
Defa	ult pickup branch:			Allow item requests from PAC		
(No	ne)	~		O Limit item requests to first available of		
✓ Enabl	e title-level hold requests from Child	ren's PAC		Allow requests on serials in PAC and Staff Client		
Defa	ult pickup branch:			Allow requests on multi-part sets i PAC and Staff Client		
(No	ne)	*		Both		
Prevent	on statuses					
-	✓ Bindery	Claim returned 🛛 🗸	]In-rep	epair 🗹 Missing 🗹 Unavailab		
In	dor 🖌 Claim power had 🗌 1	n-process	Lost	t 🗌 Routed 🗹 Withdraw		
In On-o	uer 💌 Grain riever flag					

• A system block is placed on the item record if it has a **Claim Missing Part** status. This message appears when a user tries to circulate an item with a missing part.

Item Blocks	×
Item is blocked	
A winter place	
Item block	
Item has missing parts. Patron notified.	
Do you want to continue with this operation?	
Yes No Item Record	

• The Suppress Item Display dialog box (profiles, PAC, Suppress item display) includes the Claim Missing Parts circulation status that libraries can select to prevent items with missing parts from displaying in the Polaris PowerPAC or Mobile PAC.

Suppress Item Display [QA-Qu	antum 5.0 (sys)]	×
Select the circulation statuses to be suppressed:		
Bindery		^
Claim Missing Parts		
Claim Never Had		
Claim Returned		
Held		
🗌 In		
In-Process		
🗌 In-Repair		
In-Transit		~
OK	Cancel	Help

- The existing Notification options parameter in Polaris Administration was modified as follows:
  - The Reminder tab includes a selection for Missing part notice. This option is un-selected by default. When Missing part notice is selected, the default Notification method is Patron preference, but the library can change this setting.

Send additional TXT messa Amost overdue/Auto-renew  Amost overdue/Auto-renew  Comparison  Comparison	General	Overdue & Bil	Hold Req	uest & Canc	ellation   F	ine	Reminder	Serial
Almost overdue/Auto-renew					□s	end ad	ditional TXT	messa
3      6 days between notices      Patron record expiration      Directive patron      730      days a patron has been inactive      Massing part notice      Mossing part notice      Solutions method:     Patron preference     V	✔ Alm	ost overdue/Au	uto-renew	3	days b	efore a	n item is ov	verdue
				3	days b	etweer	notices	
Inactive patron     730     days a patron has been inactive     Mossing part noice     Notification method:     Patron preference     V     Send additional TXT messa	<b>√</b> Pat	on record expi	ration 10	▲ da	iys until e	xpiratio	n	
Missing part notice Notification method: Patron preference  Gend additional TXT messa	🖌 Ina	tive patron	730	days a pa	itron has l	been in	active	
Notification method: Patron preference V Send additional TXT messa	Miss	ing part notice						
	Notifica	ition method:	Patron pre	ference	v 🗆 S	end ad	ditional TXT	messa

• On the Overdue & Bill tab, if the existing options Include claimed items and Combined patron notices are selected, the Missing Parts notice is included in the combined notice.

Notification options
General Overdue & Bill Hold Request & Cancellation Fine Reminder Serial
Overdue     Export     First overdue
Notice interval: 14 alays Include claimed items
Notification method: Patron preference V Send additional TXT message
Notification library: Lending branch V
Return address: Use notification library 🗸
Notice interval: 0 adys Notice interval: 0 adys Notification Patron preference v Send additional TXT message Send additional TXT message
Bill Notice interval: 45 days
Notification method: Patron preference v Send additional TXT message
Notification library: Lending branch V
Return address: Use notification library V
Combine patron notices
Notification method: Patron preference v Send additional TXT message
Save Cancel Apply Help

• The Missing Part notice is sent according to the settings in the Notification options parameter for the check-in branch.

#### Note:

The text and the subject of each notice can be edited in Web Admin.

- E-mail The Subject is Missing library item, and the default header text is: An item was returned to the [check-in library name] missing a part(s). Please return the part(s) to the library within 48 hours to avoid fines. If a note was entered in the Special Item Check-In dialog box, an additional Missing: field displays the note. The item details are listed: title, author, call number, barcode, format, due date, check out date, check out from. If the item has a status of In, the check-in date is displayed. If the item has a status of Out, the check-in date is blank.
- TXT The Subject is Missing library item, and the default text is: [Item Title] was returned to the library with parts missing. Please return the part(s) to the library within 48 hours to avoid fines. The note from the Special Item Check-In dialog box does not display in the text message. If there are missing claim part items in a single reporting period, a separate text message is sent for each.
- Phone The default message is: An item was returned to the [check-in library name] missing a part(s). Please return the part(s) to the library within 48 hours to avoid fines. The message does not include text from the Special Item Check-In dialog box.
- Print The default header text for the printed notice is: An item was returned to the [check-in library name] missing a part(s). Please return the part(s) to the library within 48 hours to avoid fines. If a note was entered in the Special Item Check-In dialog box, an additional Missing: field displays the note. The item details are listed: title, author, call number, barcode, format, due date, check out date, check out from. If the item has a status of In, the check-in date is displayed. If the item has a status of Out, the check-in date is blank.

If an item is in a **Claim Missing Part** status, and the missing part is recovered, you can check the item in normally if you do not want to charge the patron.

Or, if you want to charge the patron, select  $\mathbf{\mathbb{F}}$  to check the item in and generate the charge.

## Check Outs via SIP for Specific Item Circulation Statuses

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Polaris 5.0.145

Library organizations can now select the following circulation statuses that will not block patrons from checking out items using an organization's self-check unit:

- Bindery
- Claim Never Had
- Claim Returned
- In-Repair
- In-Transit
- Missing
- Unavailable
- Withdrawn

The following circulation statuses cannot be selected, and items continue to be blocked from check outs: Transferred, Lost, Returned-ILL, On-order, On-the-Fly, In-Process, or Routed. This development does not affect NCIP or check-in functions.

In Polaris Administration, a new Self-Check parameter **Check-out: Item options** was added where the library can specify the check out options for their SIP self-checkout stations. The workstation branch of the SIP selfcheck machine determines the circulation statuses that will or will not block check-outs, not the item's owning or assigned branch.

Acquisitions / Serials	Patron Services	Cataloging	PAC		Notific	atior	n
SelfCheck Unit	Request	Credit Card	Payment		NC	CIP	
			+	+	C	ń	7
Parameter		Value					,
P Checkins ok		Ver					
P Checkouts ok		Vec					
Check-out: Charge optic	ins	Setup	)				
Check-out: Item options		Setup	)				
P Check-in: Claim Never H	No						
🚠 Check-in: Claim Returned, allow checkin		Yes					
Holds ok		Yes					
👌 Offline ok		Yes					
💑 Renewals ok		Yes					
duse error correction		No					
P Status update ok (can bl	ock a patron, etc)	Yes					
P System supports the blo	ck patron message	Yes					
P System supports the che	ckin message	Yes					
P System supports the che	ckout message	Yes					,
<						>	

Double-click the parameter to open the Check-Out: Item Options dialog box. The following existing parameters were added as check box options to the new dialog:

### Tip:

These check boxes are unchecked by default unless the library has selected them prior to the upgrade. If your library has selected any of these check boxes, they are selected in the new dialog box. • Allow checkout of items with free text blocks.

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- Allow checkout of items with library-assigned blocks.
- Deny checkout if item is from another branch.

Settings defined at: 🔒 Q	A-Quantum 5.0					
Denv checkout if item is from another branch						
Deny cleatour internis iron another branch						
<ul> <li>Allow checkout of items with free text blocks</li> </ul>						
	6					
Allow checkout o	of items with library assigned blocks					
llow checkout of items with	the selected circ statuses					
Description	Name					
Description Bindery	Name Binderv					
Description Bindery Claim Never Had	Name Bindery Claim Never Had					
Description Bindery Claim Never Had Claim Returned	Name Bindery Claim Never Had Claim Returned					
Description Bindery Claim Never Had Claim Returned In-Repair	Name Bindery Claim Never Had Claim Returned In-Repair					
Description Descri	Name Bindery Claim Never Had Claim Returned In-Repair In-Transit					
Description Descri	Name Bindery Claim Never Had Claim Returned In-Repair In-Transit Missing					
Description Description Claim Never Had Claim Returned In-Repair In-Transit Missing Unavailable	Name Bindery Claim Never Had Claim Returned In Repair In-Transit Missing Unavailable					

To specify the circulation statuses for which you want to allow SIP check outs, select the statuses from the list.

#### Note:

The statuses are from the Circulation Statuses database table.

If these statuses are selected as eligible for check out from a self-check station via SIP, the items are processed as follows:

- **Bindery, In-Repair, Missing, Unavailable, Withdrawn** Check-in is bypassed, and the item is checked out.
- Claim Never Had, Claim Returned The item is checked in first, and the claim is resolved, but any outstanding bills remain for the patron who made the claim.
- In-Transit Check-in is bypassed, holds are ignored, and the In-transit to fields are cleared during check-out.

### **Auto-Renew**

Polaris 5.0.146

Items are eligible for automatic renewal, via the Notices Processing SQL job, when the item's assigned branch has set the new **Renewal: Auto-renew** patron services parameter to **Yes**. When the Notices Processing job runs, it checks the settings in the **Notification options** parameter for the patron's registered branch. If the patron has items out that are eligible for auto-renewal, the items are renewed based on the number of days selected in the **Almost overdue/Auto renew \_\_\_ days before an item is overdue** field on the Reminders tab of the Notification options dialog box. The new due date for an automatically renewed item is calculated by taking the current due date and adding the full loan period.

Automatically renewed items are included in the *Almost overdue* reminder notice. An e-mail will notify the patron that the item was renewed automatically, unless the patron has opted out of receiving this type of reminder notice. The library can set patron access options for the PAC that allow patrons to opt out of receiving reminder notices.

The conditions, such as patron blocks, that prevent manual renewals also prevent automatic renewals. In addition, automatic renewals are prevented for: hourly loans; course reserve items; e-Content; ephemeral items; items with an assigned branch that charges patrons for checkouts and renewals, or for renewals only; overdue items; or items with loan periods less than the number of days before an item is overdue.

To set up auto-renew, you use new and existing settings in Polaris Administration. The item's assigned branch determines if the item is eligible for auto-renewal, and the patron's registered branch determines when the renewal is done and whether a reminder notice (with an optional text message) is sent to the patron.

This development includes the following:

• A new **Renewal: Auto-renew** patron services parameter in Polaris Administration that enables or disables the auto-renew process.

SelfCheck Unit	Request	Credit Card Payment			NO	IP
Acquisitions / Serials	Patron Services	Cataloging	PAC	Notificatio		ation
			÷	÷	C	P
Parameter		V	'alue			^
Patron registration op	S	etup				
Patron registration: Fi	Setup					
P Quick-circ: Material ty	Book					
Reading history	S					
Registration fee option	Registration fee options					
Remove patron ID from	Remove patron ID from circ transactions					
P Renewal: Auto-renew		٢	lo			~
<						>

• Automatic renewals are completed as part of the existing Notices Processing SQL job.

• The Almost overdue label on the Reminder tab of the existing Notification options dialog box was renamed Almost overdue/Auto-renew because auto-renewed items will be added to the almost overdue reminder notice. If the patron has items out that are eligible for automatic renewal, they will be renewed based on the number of days selected in the Almost overdue/Auto renew \_\_\_\_\_ days before an item is overdue field.

		No	tification o	options		
eneral	Overdue & Bill	Hold Req	uest & Cancel	lation Fine	Reminde	Serial
				Send	d additional TX	T message
Aln	10st overdue/Au	to-renew	3	days befo days betv	ore an item is o veen notices	overdue
✔ Pa	tron record expir	ation 10	🔹 day	s until expi	ration	
<b>√</b> Ina	active patron	730	days a pat	on has bee	en inactive	
Mis	sing part notice					
Notific	ation method:	Patron pre	ference v	Seno	d additional TX	(T message

• The existing Patron Access Options PAC profile contains new options for libraries to allow patrons to choose which e-mail reminder notices they will receive: Almost overdue/Auto-renew reminder notice; Patron record expiration reminder notice; and Inactive patron reminder notice.

Patron Access Options [	QA-Quantum 5.0 (sys) ]
Self-registration Defaults Log In Contact Info	Preferences Ask us
Self-registration   Defaults   Log In   Contact Info  Patron can request address change Patron can change notification method  Confirmation e-mail to patron E-mail address Confirmation e-mail to patron E-mail address Contact an submit change request Patron can change without verification  Phone number Contact submit change request Patron can change without verification	Preferences     Aak us       Enable for patron codes:         Ø     CPH Outreach          Ø     CPH Readent          Ø     CPH Readent          Ø     CPH Readent          Ø     CPH Retired          Ø     CPH Retired          Ø     Durent Borrower          Ø     Juvenie          Ø     Juvenie          Ø     Juvenie          Ø     New Borrower          Ø     Regular          Ø     Regular          Ø     Saratoga Outreach          Ø     Saratoga Staff / Board          Ø     Saratoga Staff / Board          Ø     Self registerd
Enable phone validation (system level)	Staff / Board
Patron can opt out of these reminder notices           Image: Almost overdue/Auto-renew         Image: Patron relation	ecord expiration
E-mail to:	
Name Phelps	Branch Schenectady Branch - Central
Save	Cancel Apply Help

• New fields were added to the Patron Registration workform for library staff to indicate if a patron wants to opt out of receiving reminder notices. Changes to the patron's information in the staff client is reflected in the patron's PAC account.

21		Patr	on Registra	ation - 357715 - 0	Genera	I - Po	olaris –	□ ×
File Ed	lit View Links Tools	Help						
	差 日 🔿 🗸	< 🧐 🜄 !		¢ <table-cell></table-cell>				
🔹 🖻 🖩 🗐 🎬 Registration	Barcode: A122919: Last name: Izquierda First name: Laura Midde name: Mis. General Gender: Statistical dass: Password: Language: Former barcode: Birth date: Date of original registratio Last activity date:	4 ✓ Suffix: (Nale ● Female (None) ← ← ← English ✓ 12/ 1/1955 n: ✓ 10/12/2011 9/8/2014 3:01:06 P	: () N/A	Registe	red at: n code: Exp Te	Con Juv II iration rm: Us ID Pri	mmunity Library (COB) verile instructor	× ×
	Exclude from notices and re	minders:	Exclude	from collection agency				~
	Overdue Almost ov	erdue/auto-renew	✓ Maintain	reading list		No	ot Currently In Use	
	Hold Patron re	cord expiration	E-mail no	otices in plain text				
	Billing	atron	Do not d	lelete patron record				
For Help,	press F1							NUM

### Note:

When a patron's registered branch sends reminder notices, and the patron has not opted out of the type of reminders the branch sends out, a message is displayed if a user saves the record without a primary email address.



• The Patron Bulk Change dialog box includes options to change the **Exclude from notices and reminders** settings for multiple patrons.

Patron Record Bulk Change	×
Registration Address General UDFs Blocks/Notes Report/Record Set	
Gender:	
Language:	
Date of original registration: 9/12/2014	
eReceipt option:	
Exclude from Notices and Reminders	
Overdue notice: Almost overdue/auto-renew reminder:	
Hold notice: Patron record expiration reminder:	
Billing notice:	ļ
	1
Exclude from collection agency:	
Maintain reading list:	
E-mail notices in plain text:	
Do not delete patron record:	
OK Cancel Help	

- E-receipts will not be sent to patrons when items are renewed automatically, whether e-receipts are enabled or not in Polaris Administration.
- Automatic renewals will appear in the Item Record workform, History view.
- New fields were added to the Patron account in the PowerPAC and Mobile PAC for patrons to choose which reminder notices they will receive. (Opt-out options selected in the Patron Access Options profile for the branch apply to patrons who are registered at that branch.) Changes made in the PowerPAC or Mobile PAC are reflected in the patron's record in the staff client.

### **PowerPAC e-mail reminder notice options**

<ul> <li>Contact Information and Preferen</li> </ul>	ices
Please verify your contact information.	
Address Information Address Type Home Street one 101 E. Main Street City SYRACUSE Postal code Zip plus four	Street two State/Province NY Y
13210     County     ONONDAGA	Country USA
Contact Information           Email address           Phone 1           518-222-2222           Phone 3	Alt. E-mail Address Phone 2
Preferences: My preference for receiving library notices TXT Messaging V Phone number for TXT messages Phone 1 V Maintain reading list	Language preference English V Carrier Verizon V
Send e-mail notices in: Basic, plain text Full, HTML format	_
Send e-mail reminder notices:	25

### Mobile PAC e-mail reminder notice options

<select a="" carrier=""></select>
Phone 3 Txt to this #
<select a="" carrier=""></select>
Maintain reading list
Send e-mail notices in:
◯ Basic, plain text
Full, HTML format
Send e-mail reminder notices:
Almost overdue/auto-renewal
Patron record expiration
Inactive patron
Language preference
English

- If a patron's reminder notice settings are changed in offline mode, the changes are retained when the patron record is uploaded to Polaris.
- Almost Overdue Reminder/Auto-Renew Notice example:

#### Note:

The notice strings can be customized in WebAdmin.

Amsterdam F 28 Church S AMSTERDA 518-010-0/80	Free Library treet M, NY 12010 )					
To:						
Casey E Frai 119 Ridge R POB 397 AMSTERDA	in d M, NY 12010					
JUST A REN	INDER. The following items are	due back to t	he library on the dates indica	ted. Please ret	urn or renew	
these items a	at your convenience.					
Due Date	Title	Format	From	Renev	als remaining	2
9/22/2014	Harm's way	Book	Southern Adirondack Librar System	у	4	
9/22/2014	City of ice : a novel	Book	Amsterdam Free Library		0	
9/22/2014	First aid . cats [videorecording].	Videotape	Amsterdam Free Library		0	
We have aut <u>New Due Da</u>	iomatically renewed the following t <u>te</u> <u>Title</u>	items and the <u>Format</u>	ay are now due back on the d <u>From</u>	late indicated b <u>Re</u> <u>rer</u>	elow. newals naining	
10/20/2014	Death on the rocks	Book	Amsterdam Free L	ibrary	3	
10/20/2014	Sophie's big bed	Book	Amsterdam Free L	ibrary	1	
10/20/2014	The disputed crown	Book	Stony Creek Free I	Library	3	
Other items	checked out to you:					
Due Date	Title	Format	From	Renewals remaining	Due?	
9/25/2014	Adirondack life.	Periodical	Amsterdam Free Library	1	No	
If you do not	wish to receive this information v	ia email, plea	se reply to this message or c	ontact the libra	ry.	

• Existing Polaris standard reports that contain renewal counts will include automatic renewals along with manual renewals. However, since auto-renewals use a different check-out transaction subtype, libraries can create custom reports to differentiate between manual and automatic renewals.

In SimplyReports, patron list reports now include the following output columns for reporting on patrons who have opted out of receiving email reminder notices: Patron exclude from almost overdue; Patron exclude from patron expiration; Patron exclude from inactive patrons. In addition, the History action item record filter has a new Renewal (auto-renew) selection to limit the report output to items that have been renewed automatically.

### **Reminder Notice Opt Out**

Library staff can now specify which e-mail reminders patrons do not want to receive. In addition, you can allow patrons to select these opt-out options themselves.

#### Note:

If a patron's reminder notice settings are changed in offline mode, the changes are retained when the patron record is uploaded to Polaris.

The Patron Registration workform contains the following **Exclude from notices and reminders** check boxes:

Almost overdue/auto-renew

- Patron record expiration
- Inactive patron

Eile Ed	dit View Links	Tools Hel	Pat	ron Registr	ation - 357715 - Gen	eral	- Polaris 🗕 🗆	×
	🚅 🔒 🗧	• <b>×</b>	🧊 🌄	<b>.</b>	¢ 😰			
gistration	Barcode: Last name: First name: Middle name: Title:	A12291954 Izquierda Laura Ms. v	Suffix:		Registered Patron co	l at: ode: Expira Terr	Community Library (COB)           Javenile           Instructor           ation:           m:         0           Quint         Date:           10/12/2014         []	<ul><li>✓</li><li>✓</li></ul>
■	General Gender: Statistical class Password:	:	Male Fema (None)	le ON/A	v		User defined fields ID Number	
	Language: Former barcod	e:	English	~			Privileges / Restrictions	
1	Date of origina	l registration: ate:	<ul> <li>✓ 12/ 1/1955</li> <li>✓ 10/12/2011</li> <li>9/8/2014 3:01:06</li> </ul>	PM			Voter Registration	
	Exclude from no     Overdue	tices and remin	ders: lue/auto-renew	Exclude	e from collection agency n reading list		Not Currently In Use	*
	Hold [	Patron record	d expiration	E-mail n	notices in plain text delete patron record			
For Help,	press F1							NU

#### Note:

When a patron's registered branch sends reminder notices, and the patron has not opted out of the type of reminders the branch sends out, a message is displayed if a user saves the record without a primary email address.

Polaris	
A Reminder notices Option is e-mail. Do you want to continue?	
Yes No	

The Patron Bulk Change dialog box includes options to change the **Exclude from notices and reminders** settings for multiple patrons.

egistration Address General UDFs	s Blocks/Notes Report/Record Set
Gender:	~
Language:	$\sim$
Date of original registration:	9/12/2014
eReceipt option:	~
Exclude from Notices and Reminders	·
Overdue notice:	Almost overdue/auto-renew reminder:
Hold notice:	Patron record expiration reminder:
Billing notice:	Inactive patron reminder:
	·
Exclude from collection agency:	
Maintain reading list:	
E-mail notices in plain text:	
Do not delete patron record:	

The existing Patron Access Options PAC profile contains new options for libraries to allow patrons to choose which e-mail reminder notices they will receive: Almost overdue/Auto-renew reminder notice; Patron record expiration reminder notice; and Inactive patron reminder notice.

Self-registration Defaults Log In Contact Info	Preferences Ask us
Patron can request address change     Patron can change notification method     Confirmation e-mail to patron     E-mail address     Change allowed     Patron can submit change request     @ Patron can change without verification	CONTRACT Protocodes:     CPH Qutreach     CPH Resident     CPH Resident     CPH Refred     CPH Staff / Board     CPH Staff / Board     Delinguent Borrower     ILL Agency     Juvenile     Juvenile     New     New     New     New
Phone number  Change allowed  Patron can submit change request  Patron can change without verification  Enable phone validation (system level)	Outreach     Regular     Regular     Regular     Regular     Saratoga Outreach     Saratoga Resident     Saratoga Staff / Board     Schenectady resident     Seffregistered     Staff / Board     Staff / Board
Patron can opt out of these reminder notices  Almost overdue/Auto-renew  Patron re  F-mail to:	Add Delete
Name E Phelps S	Sranch Schenectady Branch - Central

New fields were added to the Patron account in PowerPAC and Mobile PAC for patrons to choose which reminder notices they will receive. (Optout options selected in the Patron Access Options profile for the branch apply to patrons who are registered at that branch.) Changes made in the PowerPAC or Mobile PAC are reflected in the patron's record in the staff client.

### PowerPAC e-mail reminder notice options

<ul> <li>Contact Information and Prefere</li> </ul>	nces
Please verify your contact information.	
Address information	
Address Type	
Home 🗸	
Street one	Street two
101 E. Main Street	
City	Ctate/Browinson
SYRACUSE	NY
13210	
County	Country
ONONDAGA	USA
·	
Contact information	
Email address	Alt. E-mail Address
Phone 1	Phone 2
518-222-2222	
Phone 3	
·	
Preferences:	
My preference for receiving library notices	Language preference
TXT Messaging	English V
Phone number for TXT messages	Carrier
Phone 1	Verizon
Maintain reading list	
Send e-mail notices in:	
O Basic, plain text	
Full, HTML format	
Send e-mail reminder notices:	
Almost overdue/auto-renew reminder notice	ces

### Mobile PAC e-mail reminder notice options

<select a="" carrier=""></select>	
Phone 3	Txt to this #
	$\bigcirc$
<select a="" carrier=""></select>	
Maintain reading list	
Send e-mail notices in:	
<ul> <li>Basic, plain text</li> </ul>	
Full, HTML format	
Send e-mail reminder notices:	
Almost overdue/auto-renewal	
Patron record expiration	
Inactive patron	