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Contents

About This Guide	1
Patron Services Administration Topics	1
Related Resources	3
Patron Services Administration	5
Setting Circulation Permissions	6
Overriding Permission Blocks	6
Set circulation security	7
Circulation and Patron Services Workflow Permissions	9
Setting Patron Services Parameters and Profiles	19
Review and set Patron Services parameters and profiles	19
Setting Circulation Policy and Database Tables	21
Defining Patron Account Features	22
Defining Patron Codes	23
Add a patron code	24
Filter patron codes for specific organizations	26
Mapping Patron Codes to NCIP User Privilege Types	28
Map patron codes to NCIP user privileges	29
Mapping Item Material Types to NCIP Medium Types	31
Map NCIP medium types to item material types	32
User-Defined Fields in Patron Records	35
Scanning a Driver's License for Patron Registration	36
View and convert user-defined fields for patron records	37
Set drop-menu user-defined fields for organizations	40
Setting Patron Registration Defaults and Requirements	41
Set patron record required fields and default values	41
Setting Express Registration Defaults and Requirements	46
Set express registration default values and required fields	46
Charging for Patron Registration	50
Staff Client Workflow	50
Patron Block for Registration Fee	51
Expired Registration	51
Offline Workflow	51
PAC Registration	51
Polaris ExpressCheck	52
Set patron registration fees	52
Setting Patron Duplicate Detection	53
Set optional patron duplicate detection fields	54
Setting Reading History Options	55
Enable reading histories	55
Setting Up Patron Messages	57
Patron Messages in the Staff Client	57
Patron Messages in PAC	57
Set up patron messages in Polaris Administration	58
Setting Up Patron Photos	62
System Administration Settings	62
Importing Photos from an Existing Database	63
Replace the default photo	63

Setting Options for Deleting Patron Records	64
Retaining Financial Information for Deleted Patron Records	65
Set options for deleting patron records	66
Set blocks for patron record deletion	68
Setting Patron Accounting Options	70
Waive All Option in the Patron Status Workform - Account View	71
Set patron accounting options	72
Set Polaris to waive fines at check-out or renewal	73
Setting Payment Method Options	74
Display or suppress payment methods	75
Date Sources in Patron Records	77
Removing Patron ID Information from Transaction Files	79
Circ Transactions from Which Patron IDs Are Purged	79
Remove Patron ID Report	82
Set up patron identification purging	83
Setting Up E-Commerce	85
E-Commerce with PayPal® Payflow Pro®	86
Excluding In-House Workstations from Web-Based Payments	88
Credit Card Payment Manager	88
Credit Card Reports	89
Credit Card Error Logs	89
Set up PayPal Payflow Pro credit card payments	90
Test Values for Payflow Pro Processing	102
E-Commerce with PayPal Payflow Link	104
Refunds	106
Excluding In-House Workstations from Web-Based Payments	108
Polaris Standard Reports for Payflow Link	108
Payflow Link Reports	108
Set up the PayPal Payflow Link gateway account	110
Set up Payflow Link processing in Polaris Administration	113
E-Commerce with Payments Gateway Secure Web Pay	119
Refunds	121
Excluding In-House Workstations from Web-Based Payments	123
Polaris Standard Reports for Payments Gateway	123
Payments Gateway Reports	124
Set up the Payments Gateway SWP account	125
Set up Payments Gateway processing in Polaris Administration	129
E-Commerce with Comprise™ SmartPAY™	137
Staff Client Payment Workflow	139
ExpressCheck Payment Workflow	140
PAC Payment Workflow	141
Excluding In-House Workstations from Web-Based Payments	144
Credit Card Payment Manager	144
SmartPAY Staff User Interface	145
Polaris Standard Reports - Comprise SmartPAY	146
Set up Comprise SmartPAY processing in Polaris Administration	146
Using Class Point of Sale with Polaris	156
Class POS Requirements	156
Staff Client Workflow with Class POS	156
Class POS Credit Card Transactions in PAC	157
Polaris Reports For Class POS Transactions	158
Set up Class Point of Sale credit card payments	158

Setting Up Circulation Workforms	161
Setting Up the Check Out Workform	162
Set patron data fields for the Check Out workform.	162
Set item data fields for the Check Out workform.	163
Setting Up the Check In Workform	165
Set Check In list view fields for patron and item data.	165
Setting Up Circulation Receipts	167
Setting Up Printed Receipts.	168
Set check-out receipt options	170
Set Items Out receipt options	172
Set check-in receipt options	173
Set fine receipt options	174
Set hold slip options	175
Enable hold call slips.	177
Set up hold pickup slips	178
Set in-transit slip options	182
Set receipt printer control codes	184
Set option to open the cash drawer only for cash fine receipts	187
Epson® ReStick™ Printers - Hold and In-Transit Slips	188
Setting Up eReceipts.	190
Patron Record Settings for eReceipts	190
Fine eReceipts.	191
Waive eReceipts.	192
eReceipt Options in Polaris PowerPAC and Mobile PAC.	192
Editing eReceipt Content in Polaris Language Editor (WebAdmin) ..	193
Logging eReceipts and Reporting Failures	194
Set up eReceipts	194
Item Record Circulation Settings	197
Defining Material Types	198
Add a material type entry	198
Viewing Circulation Statuses	200
Default Circulation Statuses	200
View circulation status names and edit descriptions.	202
Setting Shelving Status.	204
Set shelving status options	205
Displaying an Item's Last Borrower	208
Display a previous borrower link in item records	208
Governing Library for Circulation Transactions	209
Set the governing library for circ transactions	210
Defining Loan Periods	213
Calculating Due Dates	214
Undefined and Standard Loan Periods	214
Closed Dates and Days	215
Hourly Loans	215
Setting Up Non-Circulating Items	216
Defining Loan Period Codes	217
Add a loan period code	217
Defining Loan Period Durations	219
Add a loan period	220
Setting End-of-Term Due Dates	222
Set an end-of-term due date.	222

Defining Fines and Fees	225
Calculating Overdue Fines	226
Dates Closed	226
Days Not Fineable	227
Free Days	227
Grace Periods	228
Waiving Fines Automatically at Circulation	229
Charging Fines Automatically at Check In	229
Fines for Claimed Items	230
Setting Fine Codes	231
Add a fine code	231
Setting Fine Amounts	233
Add a fine amount	234
Defining Fee Descriptions	237
Add a fee description entry	238
Set fee descriptions for branch-level display	239
Setting Replacement Fee Defaults	241
Set the replacement charge defaults	241
Overdue Fines on Lost Items	243
Settings for Lost Item Charge Options	243
Policy Decisions for Lost Item Charge Options	244
Set lost item charge options	246
Setting Lost Item Recovery Defaults	248
Set the lost item recovery default actions	249
Charging for Checkout and Renewal	252
Set up charges for checkout and renewal	256
Managing Collection Agency Services	259
Using a Collection Agency	260
Reporting for Lost Item Charges Only	261
Reporting Minors	262
Collection Agency Reporting via FTP	263
Set up collection agency prerequisites	264
Set up collection agency processing	266
Collection Processing Reports	274
Generate the Collection Agency Synchronization	275
Setting Up Holds and ILL Request Processing	277
Holds Processing Overview	278
Setting Up Holds Routing	280
Holds Routing Sequences	282
Add a holds routing sequence entry	283
Defining Not-Supplied Reasons	287
Add a not-supplied reasons entry	287
Defining Hold Processing Options	289
Title-Level, Item-Level, and First Available Copy Requests	289
Set Holds options: Enabling, Item Status Restrictions, First Available Copy	291
Set Holds options: Charge for hold requests	295
Set Holds options: Preferred borrowers branches	296
Set Holds options: Pickup library options	297
Set Holds options: Alerts and blocks	298
Set Holds options: Expiration and Unclaim limits, Deletion options	301
Set Holds options: RTF processing	303
Set Holds options: Trapping preferences, queue settings	306
Set Holds options: Trapping preferences groups	308

Blocking Holds at Renewal	311
Restricting Holds on Specific Items	312
Restrict holds on specific items	312
Specifying Hold Status Descriptions	315
Edit hold request status descriptions	317
Setting Up ILL Requests	319
Set up interlibrary loan request processing	321
Defining Circ and Request Limit Blocks	324
Defining Item Blocks	325
Add an item block description	326
Defining Patron Block Descriptions	328
Add, select, and order patron block entries	329
Set up blocks for claims	331
Defining Loan and Request Limit Blocks	332
Patron Overdue Limits	332
Fine Limits	332
Item (Loan) Limits	333
Total Requests and Request By Material Type Limits	333
Governing Library for Loan and Request Limits	335
Setting Up Loan and Request Limit Blocks	335
List and modify loan and request limit entries	336
Calculating and Blocking for Estimated Accrued Fines	340
Displaying Estimated Fines	342
Set up estimate accrued fine calculations and blocking	346
Defining Material Type Group Limits	348
Set up check-out limits by material type groups	349
Defining Patron-Initiated Circulation Blocks	352
Set blocks on patron-initiated circulation and ebook circulation	353
Associated Patron Blocking	356
Set associated patron limit and blocking default	359
Setting Up Floating Collections	360
Floating Collections Processing Overview	361
Cooperative Considerations for Floating Collections	361
Circulation Processing for Floating Items	362
Collection Agency Processing and Floating Items	364
Item Record Updates for Floating Items	365
Designating Floating Collections	366
Designate collections as eligible to float	366
Setting Home and Receiving Branch Policies	369
Set the branches to receive floating items	370
Set the material types that cannot float	371
Limit the floating items for the same title a branch can receive	372
Setting Branch Parameters	374
Set parameters and profiles for floating collections	374
Floating Collections: Setup Examples	377
Floating Collections: Troubleshooting	379
Floating Collections Reports	380
Managing Offline Circulation	381
Setting Up Offline Circulation	382
Set up offline Polaris	383
Manually update the offline files	384
Working Offline	385

Uploading to Online Polaris (Bookmobile)	386
View and upload offline transaction files	387
Upload Report Warning Messages	389
Setting Statistical Codes for Reports	392
Defining Patron Statistical Codes	393
Add a patron statistical code	394
Defining Item Statistical Codes	396
Add an item statistical code	397
Managing Notification	399
Setting Up Notices	400
The Notification Library	400
The Notification History	401
Notice Delivery Methods	403
Exporting Notices to a Notification Service	405
Notification Language	406
Customizing Notice Text with Polaris WebAdmin (Language Editor)	406
Notification Statistical Reports	407
Set up notification methods, e-mail options, and export location	409
Overdue Notices, Bills, and Combined Notices	413
Overdue Notices	413
Bills	414
Combined Notices	415
Set up overdue notices, bills, and combined notices	416
Request Pick-Up, Second Pick-Up, & Cancelled Request Notices	421
Request Pick-Up Notices	421
Second Pick-Up Notices	422
Cancelled Request Notices	423
Notices for Integrated Ebook Requests	423
Set up request pick-up, second pick-up, & cancelled request notices	424
Fine Notices	428
Set up fine notices	429
Reminder Notices	432
Set up e-mail reminder notices	433
Printing Notices	435
Print overdue, bill, fine, or request notices	435
Print patron billing statements	439
Delivering Notices By E-mail	442
E-Mail Failure Detection	443
Automatic E-Mail Report	443
Set up e-mail notification prerequisites	444
Send e-mail special announcements	444
Delivering Notices by Text Message	445
Patron Record Settings	446
Text Message Content	448
Specify available carriers for phone and text messages	449
Setting Up SIP Self-Check Circulation	451
Setting Up SIP Self-Check	452
Add a self-check material type entry	453
Set SIP self-check parameters	456

ITG DiscXpress II™ Circulation	461
ITG DiscXpress II - Circulation Overview	462
Staff Client	462
Polaris ExpressCheck	463
Setting Up ITG DiscXpress II in Polaris	464
Enable the media dispenser	465
ITG DiscXpress II - Errors and Troubleshooting	469
Setting Up Borrow by Mail Circulation	471
Set up Borrow by Mail circulation	472
Setting Up Outreach Services	478
Setting Delivery Options	479
Set outreach delivery mode options	479
Set up outreach delivery routes	480
Setting Outreach Patrons Options	484
Set outreach patron disability selections	484
Set outreach patron equipment selections	486
Set reading history limits for outreach patrons	487
Setting Outreach Items Options	489
Set circulation statuses for outreach selection lists	489
Set branch items to include in outreach selection lists	491
Set pick list column heads	493
Prompt - update next service date at normal check out	494
Setting Up Reader Ratings	495
Packing Lists	495
Set up reader ratings	496
Set up the packing list content and print method for reader ratings ..	497
Setting Up Course Reserves	498
Setting Course Reserve Tables	499
Add courses for course reserves	500
Add course schedule information for course reserves	502
Add departments for course reserves	504
Add schools/divisions for course reserves	506
Setting Course Reserve Options	507
Set default values for reserve items	507
Circulation Permissions Reference	510
Patron Services Parameters Reference	519
Patron Services Profiles Reference	531
Notification Parameters Reference	533
Request Parameters Reference	534
Self-Check Parameters Reference	535
Credit Card Payment Parameters Reference	539
Index	540

About This Guide



This guide contains information about using Polaris® Administration to set up patron services and circulation functions. It is intended for Polaris administrators and others responsible for setting up, customizing, and maintaining Polaris.

Patron Services Administration Topics

Important:

For information about developments that may have occurred after this information was published, go to www.polaristown.com.

Patron Services Administration	Setting permissions for patron services and circulation workflows; basic procedures for setting the profiles, parameters, and tables that control patron services and circulation.
Defining Patron Account Features	Setting up patron codes and user-defined fields for patron records; NCIP mapping; setting defaults for patron registration and express registration; charging for patron registration; setting up patron messages; setting up patron photo identification and importing photos; options for duplicate detection, reading histories, deleting patron records; setting patron accounting functions; purging patron identification information from transaction logs.
Setting Up E-Commerce	Setting up credit card processing; using Active Payment Manager (Class Point of Sale) with Polaris.
Setting Up Circulation Workforms	Specifying the data fields for the check-out and check-in workforms.
Setting Up Circulation Receipts	Setting up printed check-out and check-in receipts, Items Out receipts, fine receipts, hold slips/hold call slips, and in-transit slips; setting receipt printer control codes; Epson® ReStick™ printers; setting up eReceipts (e-mail and text message receipts).
Item Record Circulation Settings	Defining the item record settings (material types and circulation statuses) that affect circulation; mapping item material types to NCIP medium types; setting a “shelving” status for display purposes; displaying an item’s last borrower.
Governing Library for Circulation Transactions	Specifying which library’s settings should control due date calculation, loan and request limits, and fine calculation.

Defining Loan Periods	Settings for calculating due dates, loan period codes, loan periods, end-of-term due dates.
Defining Fines and Fees	Fines and fees, including fine codes, fine amounts, fee descriptions, and replacement fees; setting default account actions for lost-and-recovered items; charging for checkout and renewal.
Managing Collection Agency Services	Setting up automated collection agency reporting; processing collection agency reports.
Setting Up Holds and ILL Request Processing	Setting up hold requests routing; setting up holds and interlibrary loan processing; restricting holds on specific items.
Defining Circ and Request Limit Blocks	Item and patron blocks; loan and request limit blocks; blocking for estimated accrued fines; material type group limits; blocks on patron-initiated renewals and ebook circulation; associated patron blocking.
Setting Up Floating Collections	Floating collections overview; designating floating collections; setting home and receiving branch policies; setting branch parameters; setup examples; reports.
Managing Offline Circulation	Setting up Polaris to work offline; using Polaris offline; uploading offline transactions (Bookmobile).
Setting Statistical Codes for Reports	Defining patron and item statistical codes for reporting purposes.
Managing Notification	Setting up overdue, billing, hold request, fine, combined, and routing notices (print, e-mail, text message, and phone notification); reminders and special announcements; generating print, e-mail, and text message notices.
Setting Up SIP Self-Check Circulation	Settings for SIP self-check systems.
ITG DiscXpress II™ Circulation	Overview and set-up information for ITG DiscXpress (media dispenser) circulation in the staff client and Polaris ExpressCheck.
Setting Up Borrow by Mail Circulation	Enabling and configuring Borrow by Mail request processing.
Setting Up Outreach Services	Configuring Outreach Services: setting up delivery modes and routes; disability and equipment options; selection list filters; list view column heads; reader ratings scale and packing list.
Setting Up Course Reserves	Setting up course reserve functions to manage reserving and circulating items for academic courses.
Circulation Permissions Reference	Reference list of circulation permissions as they appear in the Polaris Administration Explorer, Security view.
Patron Services Parameters Reference	Reference list of Patron Services parameters as they appear in the Polaris Administration Explorer - Parameters, Patron Services tabbed page.

Patron Services Profiles Reference	Reference list of Patron Services profiles as they appear in the Polaris Administration Explorer - Profiles, Patron Services tabbed page.
Notification Parameters Reference	Reference list of Notification parameters as they appear in the Polaris Administration Explorer - Parameters, Notification tabbed page.
Request Parameters Reference	Reference list of Request parameters as they appear in the Polaris Administration Explorer - Parameters, Request tabbed page.
Self-Check Parameters Reference	Reference list of SelfCheck Unit parameters as they appear in the Polaris Administration Explorer - Parameters, SelfCheck Unit tabbed page.
Credit Card Payment Parameters Reference	Reference list of Credit Card Payment parameters as they appear in the Polaris Administration Explorer - Parameters, Credit Card Payment tabbed page.

Related Resources

- *Polaris Installation Guide*

Contains information about installing and updating Polaris servers, staff client software, and public access software.

- *Polaris Administration Guides*

This guide is part of a Polaris Administration document set. The set also includes the following guides:

- *Polaris Administration Guide* - Contains information about using the Polaris Administration interface; setting up organizations, servers, collections, workstations, and staff members; setting permissions, parameters, and profiles; working with tables; setting search tool characteristics, barcode formats, online document location, and transaction logging.
- *Polaris Public Access Administration Guide* - Contains information about setting up and customizing Polaris® PowerPAC™, Polaris® PowerPAC™ Children's Edition, and Polaris® Mobile PAC™.
- *Polaris Telephony Administration Guide* - Contains information about setting up and customizing outbound and inbound telephony services.
- *Polaris ExpressCheck Administration Guide* - Contains information about setting up the Polaris ExpressCheck workstation, Polaris Administration settings for Polaris ExpressCheck circulation, and customizing the Polaris ExpressCheck interface.

- *Polaris Basics Guide*

Contains basic Polaris information, including procedures to start Polaris tasks and find, create, and display records. This guide also discusses how to use Polaris documentation, including online Help.

- *Polaris Online Help*

Polaris online Help is accessible from the Help menu on the Polaris Shortcut Bar or any Polaris workform, or by pressing **F1** with a Polaris window active.

- *Polaris Library Systems Web Site*

For updated user and support information, go to www.polaristown.com. You can also contact your Site Manager at: 1-877-857-1978.

Patron Services Administration



Polaris Administration settings control how Polaris data is categorized, used, and stored, and what functions are available to staff and patrons. You can make most administration settings by two methods: through the Administration Explorer, and through the appropriate workform for a specific record. For detailed information about using the Administration Explorer, finding and opening administration records, and general methods for setting permissions, parameters, profiles, and tables, see the *Polaris Administration Guide 4.1R2*.

Note:

Topics in Polaris Administration guides and online Help use the Administration Explorer method, unless you must specifically open the record workform.

Patron services administration includes specific settings for patron services and circulation functions.

See the following topics:

- [“Setting Circulation Permissions”](#) on page 6
- [“Setting Patron Services Parameters and Profiles”](#) on page 19
- [“Setting Circulation Policy and Database Tables”](#) on page 21

Setting Circulation Permissions

Before your staff can do patron registration, patron accounting, and circulation tasks in Polaris, you must set specific permissions to do the tasks. Circulation permissions define who can create, access, and work with patron records and circulation functions. Each organization can specify which groups, workstations, and staff members are allowed to work with records and control processes. For detailed information about managing Polaris permissions, see [“Granting Permissions”](#) in the *Polaris Administration Guide 4.1R2*.

Note:

Certain System Administration permissions are required to assign permissions. See [“Permissions to Set Permissions”](#) in the *Polaris Administration Guide 4.1R2*.

See the following topics:

- [“Overriding Permission Blocks”](#) on page 6
- [“Set circulation security”](#) on page 7
- [“Circulation and Patron Services Workflow Permissions”](#) on page 9

Overriding Permission Blocks

When a staff member does not have the appropriate permission to do a patron services/circulation task, a permission block message appears. You can allow certain staff members or supervisors to override the permission block so that the staff member without permission can continue the blocked task. Set the Patron Services profile **Override patron services blocks** to **Yes** at the staff member level for the staff member who should be able to override permission blocks. For more information about how to set profiles, see [“Setting Patron Services Parameters and Profiles”](#) on page 19.

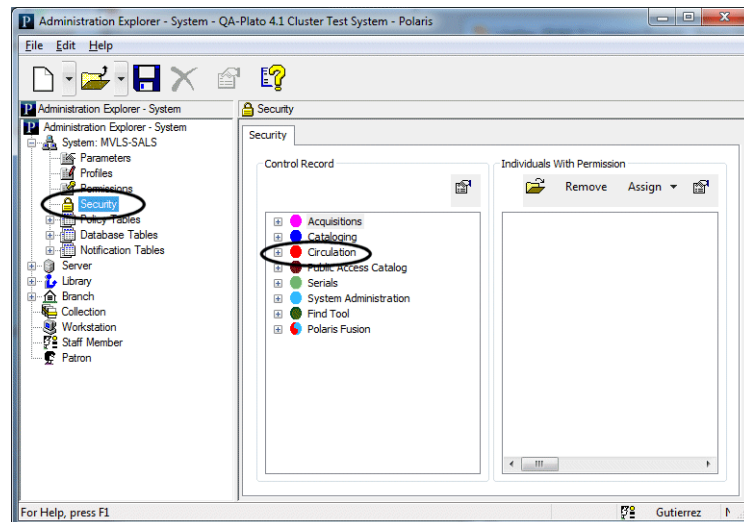
1-2-3

Set circulation security

Follow these steps to review and set circulation security.

1. In the Administration Explorer tree view, select the **Security** folder for the organization for which you want to set circulation permissions. Certain permissions related to holds, interlibrary loans, patron registration, and patron status (accounting) must be set for each branch that does these functions. Other permissions are set at the system level.

The Security view is displayed in the details pane.

**Tip:**

To display all the circulation permissions, select (highlight) **Circulation** in the Control Record list, and press **ALT+*** (on the numeric key pad).

2. Double-click **Circulation** in the **Control Record** list.

The circulation permissions list for records and functions appears.

3. Double-click the record or function for which you want to assign permissions.

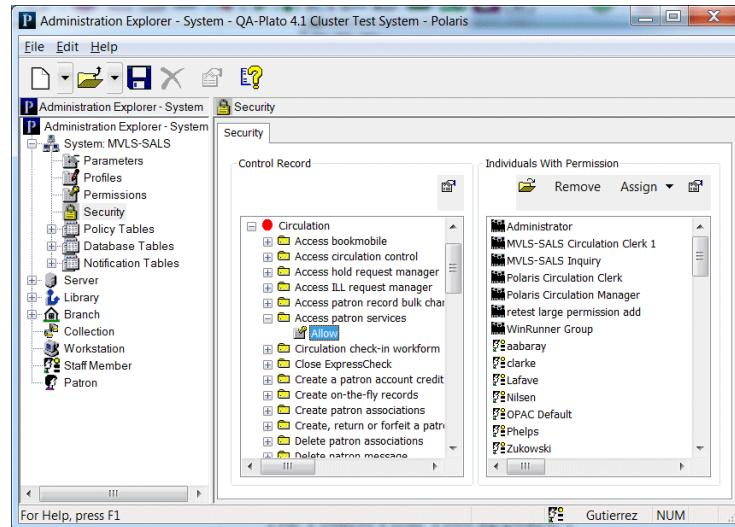
The permissions list for the selected object appears.

4. Select the permission you want to assign.

The staff members, workstations, and groups that have the permission for the organization are listed under **Individuals With Permission**.

Note:

For a list of the permissions that are required to do specific circulation and patron services tasks, see ["Circulation and Patron Services Workflow Permissions"](#) on page 9.



5. Add the resources (groups, workstations, staff members) that need the selected permission by doing the following steps:

- a) Click **Assign**, and select the resource type.

The Polaris Find Tool appears.

- b) Use the Find Tool to search for and select one or more resources.

The Administration Explorer is displayed. The selected resources are displayed in the **Individuals With Permission** list.

6. Repeat steps 3-5 as needed.
7. Select **File, Save** to save your changes.

Note:

To apply your permission changes to the staff client, exit the staff client and log back in.

Related Information

- **Circulation permissions (organized by workflow)** - See [“Circulation and Patron Services Workflow Permissions”](#) on page 9.
- **Circulation permissions (reference list)** - See [“Circulation Permissions Reference”](#) on page 510.
- **More about Polaris permissions** - See [“Granting Permissions”](#) in the *Polaris Administration Guide 4.1R2*.

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 Reference"](#) on page 510. For more information about setting permissions in Polaris, see ["Granting Permissions"](#) in the *Polaris Administration Guide 4.1R2*.

Workflow	Required Permissions	Administration Explorer Security Location
Checking Out		
Check out and renew materials - minimum	Access circulation control: Allow Patron registration: Access Renew items: Allow Item records: Access	System - Circulation Branch - Circulation System - Circulation Branch - Cataloging
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 to 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 has a free-text block	Override item free-text blocks: Allow	System - Circulation
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

<i>Workflow</i>	<i>Required Permissions</i>	<i>Administration Explorer Security Location</i>
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 the ILL request limit	Override request limits: Allow	System - Circulation
Override second-level fine block during check-out	Fines: override 2nd level fine block: Allow	System - Circulation
Override renewal blocks	Renew overdue items: Allow	System - Circulation
	Override renewal limit blocks: Allow	System - Circulation
Override block if patron's account is in collection	Override collection agency block: Allow	System - Circulation
Create or delete patron blocks during check-out	Patron status: Create/delete patron blocks	Branch - Circulation
Express-register a patron during check-out	Patron registration: Create express registration record	Branch - Circulation
Override blocks during check-out for items pending in the hold queue	Override request blocks: Allow	System - Circulation
Override blocks during check-out for items that do not circulate	Override non-circulating blocks: Allow	System - Circulation
Do express cataloging during check-out for items not found in the database	Create on-the-fly records: Allow	System - Circulation
Set special loan periods during check-out	Modify due date and time: Allow	System - Circulation
Set special loan periods for a renewal	Modify renewal period: Allow	System - Circulation
	Patron status: Access	Branch - Circulation
	Patron status: Display items checked-out	Branch - Circulation
	Patron status: Modify patron account	Branch - Circulation
Set a new due date for items already checked out	Reset due date: Allow	System - Circulation
Customize the message text on check-out receipts	Modify receipt message text: Allow	System - Circulation
Receiving Payments		
Receive payments for fines and fees	Create a patron account credit: Allow	System - Circulation
	Fines: pay fines at circ: Allow	System - Circulation
	Fines: waive fines at circ: Allow	System - Circulation
	Patron status: Access	Branch - Circulation
	Patron status: Access patron account	Branch - Circulation
	Patron status: Access patron account: transaction summary	Branch - Circulation
	Patron status: Modify patron account	Branch - Circulation

<i>Workflow</i>	<i>Required Permissions</i>	<i>Administration Explorer Security Location</i>
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
Checking In Items		
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 item (from In to In-repair, Unavailable, or Bindery) from the Check In workform	Access circulation control: Allow Manage item dialogs: Modify circulation status	System - Circulation System, Library, Branch - Circulation
Change the material type of a checked in item from the Check In workform	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 workform	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 workform	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 workform	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 workform: Access In-House mode	System - Circulation System - Circulation

<i>Workflow</i>	<i>Required Permissions</i>	<i>Administration Explorer Security Location</i>
Take an item inventory	Access circulation control: Allow Circulation check in workform: Access Inventory mode	System - Circulation System - Circulation
Receiving and checking in shelf-ready acquisitions items		
Check in new shelf-ready materials at the loading dock	Access Acquisitions: Allow Check in shelf-ready materials: Allow	System - Acquisitions System - Acquisitions
Circulating Ephemeral Items (Polaris Quick-Circ)		
Work with quick-circ item records	Quick-circ item records: Access	Branch - Cataloging
	Quick-circ item records: Create	Branch - Cataloging
	Quick-circ item records: Delete	Branch - Cataloging
	Quick-circ item records: Modify	Branch - Cataloging
Working with Patron Accounts		
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 Patron status: Display notes Patron status: Display patron blocks Patron status: Display reader services (reading histories and Outreach Services)	System - Circulation System - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation Branch - Circulation

<i>Workflow</i>	<i>Required Permissions</i>	<i>Administration Explorer Security Location</i>
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: 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.	System - Circulation System - Circulation Branch - Circulation Branch - Circulation System - Circulation Branch - Circulation Branch - Circulation Branch - Circulation

<i>Workflow</i>	<i>Required Permissions</i>	<i>Administration Explorer Security Location</i>
Maintain patron registration records	Access circulation control: Allow	System - Circulation
	Access patron record bulk change: Allow	System - Circulation
	Access patron services: Allow	System - Circulation
	Create patron associations: Allow	System - Circulation
	Delete patron associations: Allow	System - Circulation
	Merge patrons: Allow	System - Circulation
	Patron record sets: Access	System, Library, Branch - Circulation
	Patron record sets: Create	System, Library, Branch - Circulation
	Patron record sets: Delete	System, Library, Branch - Circulation
	Patron record sets: Modify	System, Library, Branch - Circulation
	Patron registration: Access	Branch - Circulation
	Patron registration: Delete	Branch - Circulation
	Patron registration: Modify (also needed to bulk-change patron records for an organization)	Branch - Circulation
	Patron status: Access	Branch - Circulation
	Patron status: Display associations	Branch - Circulation
	Patron status: Display reader services (reading histories and Outreach Services)	Branch - Circulation
	Patron status: Modify notes	Branch - Circulation
	Patron status: Modify patron account	Branch - Circulation
	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.	System, Library, Branch - Circulation
	Reading history: Remove ORS patron history entries: Allow (remove individual items from reading history) This permission is also required: Patron Status: Modify reader services.	System, Library, Branch - Circulation
	Use 'own' patron record sets: Allow	System - Circulation
	Post patron message	System - Circulation
	Delete patron message	System - Circulation
	Modify photo IDs: Allow (licensed feature)	System - Circulation
	Delete photo IDs: Allow (licensed feature)	System - Circulation
	Patron claims: Reset total claim count: Allow	System - Circulation

<i>Workflow</i>	<i>Required Permissions</i>	<i>Administration Explorer Security Location</i>
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 from the Patron Status workflow	Patron status: Access Patron status: Display hold request list Patron status: Modify patron account Bibliographic Records - Access Item Records - Access	Branch - Circulation 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 System, Library, Branch - Cataloging System, Library, Branch - Cataloging

<i>Workflow</i>	<i>Required Permissions</i>	<i>Administration Explorer Security Location</i>
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 Branch - Circulation System, Library, Branch - Cataloging System, Library, Branch - Cataloging
Course Reserve Permissions		
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

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

<i>Workflow</i>	<i>Required Permissions</i>	<i>Administration Explorer Security Location</i>
Outreach Services Permissions		
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
Collection Agency Permissions		
Remove a specific amount on a patron's account from collection agency reporting	Patron status: Access	Branch - Circulation
	Patron status: Access patron account	Branch - Circulation
	Patron status: Modify patron account	Branch - Circulation
	Remove collection agency block: Allow	System - Circulation

Setting Patron Services Parameters and Profiles

Patron Services parameters and profiles control both patron services and circulation functions. The sets of available parameters and profiles are different for each administration level (system, library, and branch). Separate sets of parameters control requests, notification, self-check operations, and credit card transaction processing.

You can view and set the Patron Services parameters and profiles from the Administration Explorer or an administration workform.

Note:

These System Administration permissions are required to modify parameters and profiles: **Access Administration: Allow; Libraries: Access; Branches: Access; Modify parameters: Allow; Modify profiles: Allow.**

See the following topic:

- [“Review and set Patron Services parameters and profiles”](#) on page 19

1-2-3

Review and set Patron Services parameters and profiles

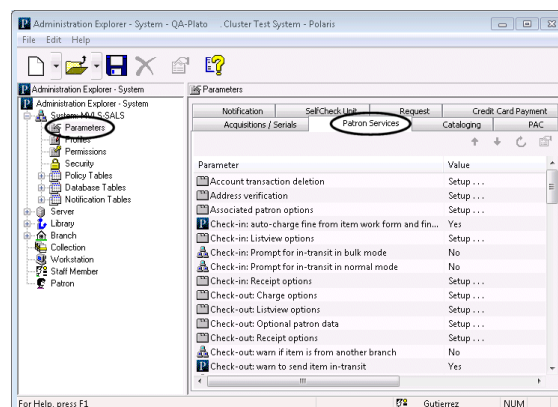
Follow these steps to review and set the Patron Services parameters and profiles.

1. In the Administration Explorer tree view, expand the organization for which you want to set parameters.
2. Select **Parameters** or **Profiles** in the list under the expanded folder.

The **Parameters** or **Profiles** tabs are displayed in the details view.

3. Select the **Patron Services** tab.

The illustration shows the system-level Patron Services parameters view on the Administration Explorer.



4. Use the scroll bar to review all the parameters or profiles in the list.

Note:

Refer to [“Patron Services Parameters Reference”](#) on page 519 and [“Patron Services Profiles Reference”](#) on page 531 for descriptions and requirements.

5. Double-click the parameter or profile you want to set.

The parameter or profile value is highlighted, ready for editing, or a dialog box appears.

Tip:

To get a setting from the next higher organizational level, right-click the parameter or profile and select **Inherit higher level values**. To give a setting to multiple lower organizations, right-click the parameter or profile and select **Transmit values to lower levels**. Not all settings can be inherited or transmitted.

6. Set the parameter or profile as follows:

- Type text.
- Use arrows to select an option.
- In a dialog box, enter the information and click **OK**.

7. Select **File, Save** to save any changes.

Note:

To see the effects of your parameter and profile changes in the staff client, exit the staff client and log back in.

Related Information

- **General information about parameters and profiles in Polaris Administration** - See [“Setting Parameters and Profiles”](#) in the *Polaris Administration Guide 4.1R2*.
- **Patron Services parameters (reference list)** - See [“Patron Services Parameters Reference”](#) on page 519.
- **Patron Services profiles (reference list)** - See [“Patron Services Profiles Reference”](#) on page 531.
- **Notification parameters** - See [“Managing Notification”](#) on page 399.
- **Request parameters** - See [“Setting Up Holds and ILL Request Processing”](#) on page 277.
- **Self-check parameters** - See [“Setting Up SIP Self-Check Circulation”](#) on page 451.
- **Credit Card Payment parameter** - See [“Setting Up E-Commerce”](#) on page 85.

Setting Circulation Policy and Database Tables

Many circulation workflows are affected by policy and database table settings. Some tables define the options available for specific fields in item and patron records, while others identify values used in circulation transactions, such as due date calculation and overdue fine calculation. The tables are typically set up during implementation, data conversion, or Polaris site installation. Many can be edited as your needs change. You can edit some tables at the branch level. Other settings must be shared by all organizations.

Note:

Specific System Administration permissions are required to work with circulation policy, database, and notification tables. For more information, see ["Circulation Administration Permissions"](#) in the *Polaris Administration Guide 4.1R2*.

- For general information about tables in Polaris, see ["Working with Tables"](#) in the *Polaris Administration Guide 4.1R2*.
- For a reference list of Polaris tables with brief descriptions and links to detailed information, see ["Administration Tables Reference"](#) in the *Polaris Administration Guide 4.1R2*.
- For links to information about specific tables that affect circulation and patron services, see the index.

Defining Patron Account Features



Patron records store patron registration and account information. In Polaris Administration, you set up default values for patron records, criteria for detecting duplicate records, and criteria for deleting them. Additional settings affect patron accounting operations such as paying and waiving charges.

Note:

For information about setting up e-commerce (credit card processing) in the staff client, PAC, and Polaris ExpressCheck, see ["Setting Up E-Commerce"](#) on page 85.

See the following topics:

- ["Defining Patron Codes"](#) on page 23
- ["Mapping Patron Codes to NCIP User Privilege Types"](#) on page 28
- ["User-Defined Fields in Patron Records"](#) on page 35
- ["Setting Patron Registration Defaults and Requirements"](#) on page 41
- ["Setting Express Registration Defaults and Requirements"](#) on page 46
- ["Charging for Patron Registration"](#) on page 50
- ["Setting Patron Duplicate Detection"](#) on page 53
- ["Setting Reading History Options"](#) on page 55
- ["Setting Up Patron Messages"](#) on page 57
- ["Setting Up Patron Photos"](#) on page 62
- ["Setting Options for Deleting Patron Records"](#) on page 64
- ["Setting Patron Accounting Options"](#) on page 70
- ["Setting Payment Method Options"](#) on page 74
- ["Date Sources in Patron Records"](#) on page 77
- ["Removing Patron ID Information from Transaction Files"](#) on page 79

Defining Patron Codes

Patron codes define available services, loan periods, fines, and limits for specific classes of patrons. They are also used for reports. An appropriate patron code is typically assigned to the patron when the patron registers.

You define patron codes in the Patron Codes policy table, which can be opened from an organization workform or with the Administration Explorer. All organizations have access to the same set of patron code names because the codes can be entered and changed from the system, library, and branch levels. Changes are immediately applied to all Polaris records that use the code, regardless of which organization owns the records.

Patron codes are available as selections in the Fines policy table, Loan Periods policy table, and the **Patron code** box on the Patron Registration workform. Each organization can filter the list of codes so that only selected codes are available for use in the **Patron code** box on the Patron Registration workform for that organization's patron records. The illustration shows the Patron Registration workform.

The screenshot shows the 'Patron Registration' window. The 'Patron code' dropdown is open, displaying a list of codes. An arrow points to this list with the text: 'Patron codes: Each organization can filter this list for its own patron records'.

Note:

These System Administration permissions are required to modify the Patron Codes policy table: **Access administration: Allow; Access tables: Allow; Modify patron codes table: Allow.**

See the following topics:

- “Add a patron code” on page 24
- “Filter patron codes for specific organizations” on page 26

1-2-3

Add a patron code

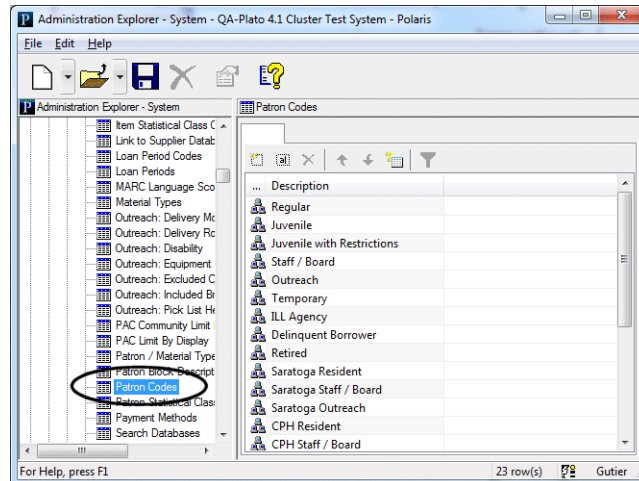
Follow these steps to add a patron code in the Patron Codes policy table.

Important:

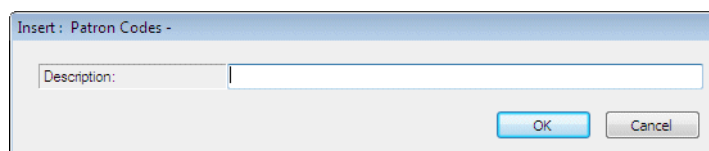
Add patron codes carefully because you cannot delete patron code entries using the Polaris Administration tools. However, the system administrator can change the Patron Codes table using SQL Server's Query Analyzer.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Patron Codes**.

The Patron Codes policy table is displayed in the details view.



2. Click  to display the Insert: Patron Codes dialog box.



3. Type text describing the new patron code in the **Description** box.
The text can be a code, mnemonic, abbreviation, or full description. Be aware that your entry will be displayed as a selection in the **Patron Code** field of all records that use this field, and will be displayed to the patron on the PAC patron account page.
4. Click **OK** on the dialog box.
The Patron Codes table appears with the new patron code description. The status bar indicates that the modification is pending.
5. Select **File, Save** to save your changes.
The status bar indicates that the record is saved.
6. Select the codes each organization wants to use. See [“Filter patron codes for specific organizations”](#) on page 26.

Related Information

- **Modify a table entry** - Select the entry and click . You should limit your changes to correcting spelling or using a different choice of words for the same patron type.

Important:

Any changes to an existing patron code are immediately applied to all records that are using the original code.

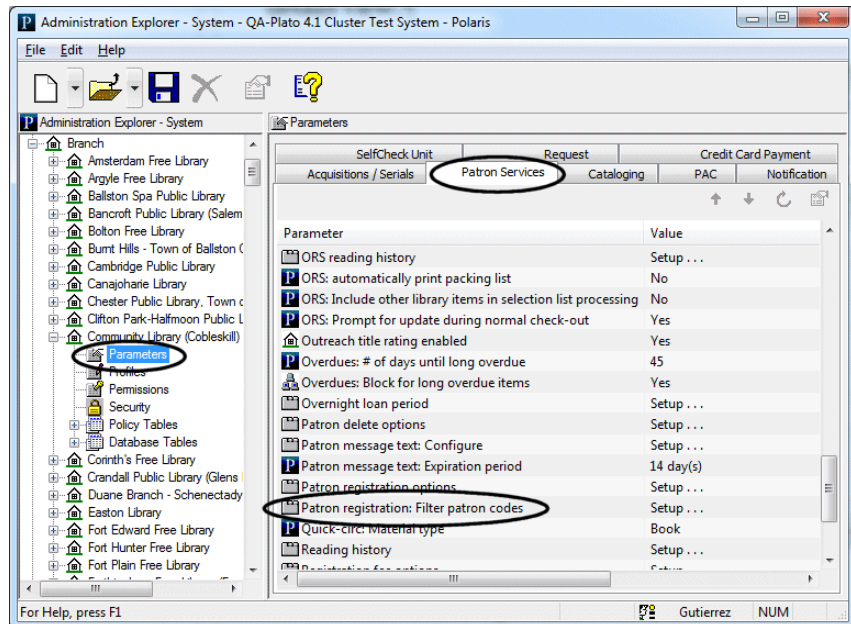
- **Loan periods** - Due dates are calculated based on specific patron code/loan period code combinations. See [“Defining Loan Period Durations”](#) on page 219.
- **Fines** - Fine amounts are calculated based on specific patron code/fine code combinations. See [“Setting Fine Amounts”](#) on page 233.
- **Loan and request limits** - Specific patron code/material type combinations determine loan and request limits. See [“Defining Loan and Request Limit Blocks”](#) on page 332.
- **Patron statistical class codes** - You can also set up patron statistical categories specifically for reporting purposes. These do not affect loan periods, fines, or loan and request limits. See [“Defining Patron Statistical Codes”](#) on page 393.
- **Patron barcode formats** - See [“Barcode Formats”](#) in the *Polaris Administration Guide 4.1R2*.

1-2-3

Filter patron codes for specific organizations

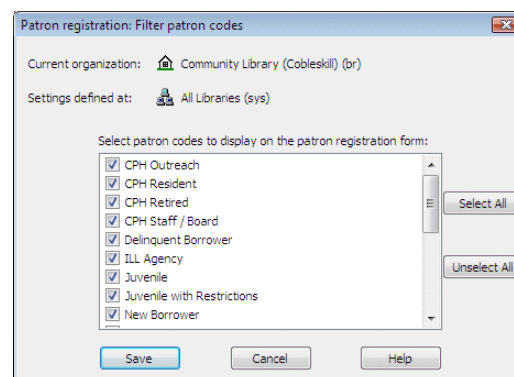
The patron codes available for use in a patron record are based on the settings for the patron's registered branch. Follow these steps to filter patron codes for use by specific organizations.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.



2. Double-click **Patron registration: Filter patron codes**.

The Patron Registration Filter dialog box opens. The list of patron codes are those defined in the Patron Codes policy table (see [“Add a patron code”](#) on page 24). When a new code is added to that table, it is added to the Filter dialog box and is selected for use by default.



Note:

The organization icons at the top of the dialog box indicate whether the settings have been inherited. Initially they are inherited from the system-level settings. Once you change settings at the branch level, they are no longer inherited from the system, even if the system settings are changed.

3. Check or uncheck the codes until the checked items reflect those you want to offer as patron code choices for this organization.
4. Click **Save**.

If you have unchecked patron codes, they are removed from the list of patron codes available on workforms for this organization. If an unchecked code is in use, a message informs you of the number of patron records that use the code at this organization and any descendant organizations. You can continue to save or cancel the operation.

Mapping Patron Codes to NCIP User Privilege Types

NCIP (NISO Circulation Interchange Protocol) is a standard suite of messages designed to allow disparate systems, such as the Polaris ILS and regional resource sharing solutions or ILL applications, to exchange data in support of lending and circulating material among members of the two systems. NCIP is also used for patron authentication alone by some third party applications. For more information about preparing for NCIP and Polaris ILS transactions, see *NCIP Lending & Borrowing with Polaris*, available at www.polaristown.com.

If your library uses NCIP, you should map Polaris patron codes to the public use privilege types and/or academic user privilege types defined by the NCIP standard. Available public user types include **Adult**, **Child**, **Senior**, **Staff**, and **Young Adult**. Available academic user types include **Faculty**, **Graduate**, **Postdoctoral**, **Staff**, and **Undergraduate**. **None** is also a valid value, and means that those Polaris patron codes are not mapped to any NCIP user privilege type, and will not be authenticated.

Use the system-level policy table **NCIP User Privilege Types** to map Polaris patron codes to NCIP user privilege types.

Note:

These System Administration permissions are required to modify the NCIP User Privilege Types policy table: **Access administration: Allow**; **Access tables: Allow**; **Modify NCIP User Privilege Types table: Allow**.

See the following topics

- [“Map patron codes to NCIP user privileges”](#) on page 29

1-2-3

Map patron codes to NCIP user privileges

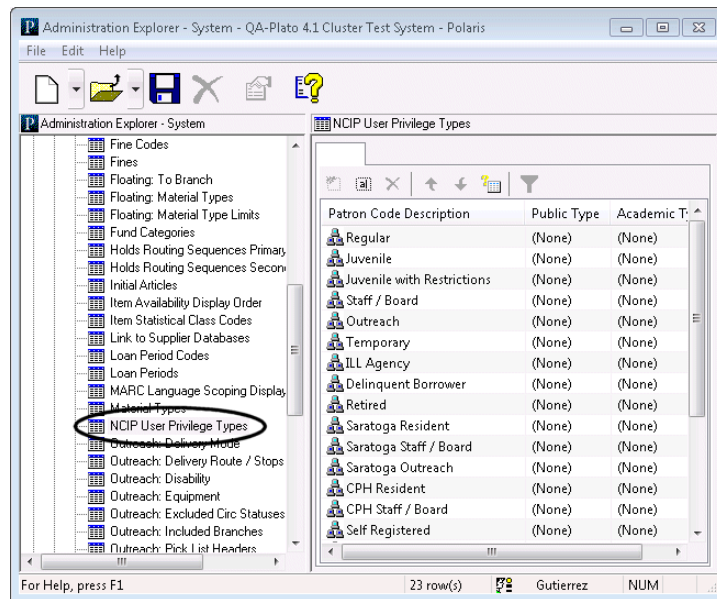
Follow these steps to map Polaris patron codes to NCIP user privilege types.

Note:

Contact your Polaris Site Manager for advice on completing this table.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the system, and select **NCIP User Privilege Types**.

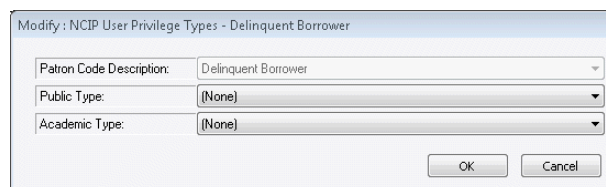
The NCIP User Privilege types policy table is displayed in the details view.



2. To modify a mapping, select the Polaris patron code and click the Modify icon  above the table.

The Modify dialog box opens.

3. Select a public user privilege, an academic user privilege, both, or **None** (no mapping).



Note:

None means that those Polaris patron codes are not mapped to any NCIP user privilege type, and will not be authenticated for ILL requests.

4. Click **OK** on the dialog box.

The NCIP User Privilege types table appears with the new mapping.
The status bar indicates that the modification is pending.

5. Select **File, Save** to save your changes.

Related Information

- **Default mapping for new patron codes** - If a new Polaris patron code is added to your system, it is automatically listed in the NCIP User Privilege Types table with a default value of **None** (no mapping) for both public and academic user privileges.
- **Polaris material types and NCIP medium types** - To support the interchange of materials, Polaris item material types must be mapped to NCIP medium types. See [“Mapping Item Material Types to NCIP Medium Types”](#) on page 31.

Mapping Item Material Types to NCIP Medium Types

NCIP (NISO Circulation Interchange Protocol) is a standard suite of messages designed to allow disparate systems, such as the Polaris ILS and regional resource sharing solutions or ILL applications, to exchange data in support of lending and circulating material among members of the two systems. For more information about preparing for NCIP and Polaris ILS transactions, see *NCIP Lending & Borrowing with Polaris*, available at www.polaristown.com.

NCIP supports a limited number of medium types, as shown in the table below.

<i>NCIP Medium Type ID</i>	<i>Description</i>
1	Audio tape
2	Blu-Ray
3	Book
4	Book with Audio Tape
5	Book with Compact Disc
6	Book with Diskette
7	Bound Journal
8	CD-Rom
9	Compact Disc (CD)
10	Diskette
11	DVD
12	Magazine
13	Microform
14	Video Tape

To support the interchange of materials, NCIP medium types must be associated with your library's item material types. Two system-level policy tables, **NCIP Medium Types: Outgoing** and **NCIP Medium Types: Incoming**, are available in Polaris Administration for this purpose. **NCIP Medium Types: Outgoing** maps the library's Polaris item material types to NCIP medium types and is used for requests where the Polaris library is the lender. **NCIP Medium Types: Incoming** maps NCIP Medium to Polaris item material types for incoming requests, and is used for requests where the Polaris library is the borrower. This table allows the library to create ILL items with different material types.

Note:

These System Administration permissions are required to modify the NCIP Medium Types policy tables: **Access administration: Allow**; **Access tables: Allow**; **Modify NCIP Medium Types: Outgoing - Allow**; **Modify NCIP Medium Types: Incoming - Allow**.

1-2-3

Map NCIP medium types to item material types

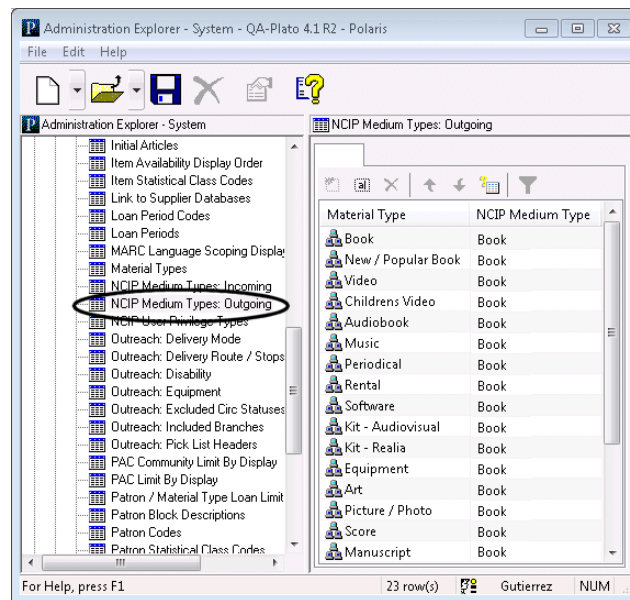
Follow these steps to map NCIP medium types to Polaris item material types.

Note:

Contact your Polaris Site Manager for advice on completing this table.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the system, and select **NCIP Medium Types: Outgoing**.

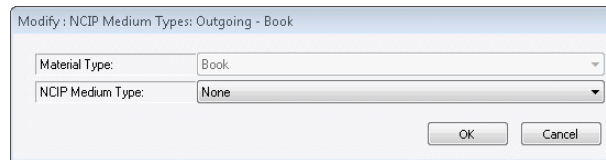
The NCIP Medium Types: Outgoing policy table is displayed in the details view.



This table maps the library's Polaris item material types to NCIP medium types and is used for requests where the Polaris library is the lender.

2. To map a Polaris item material type to an NCIP medium type, double-click the material type.

The Modify dialog box appears.

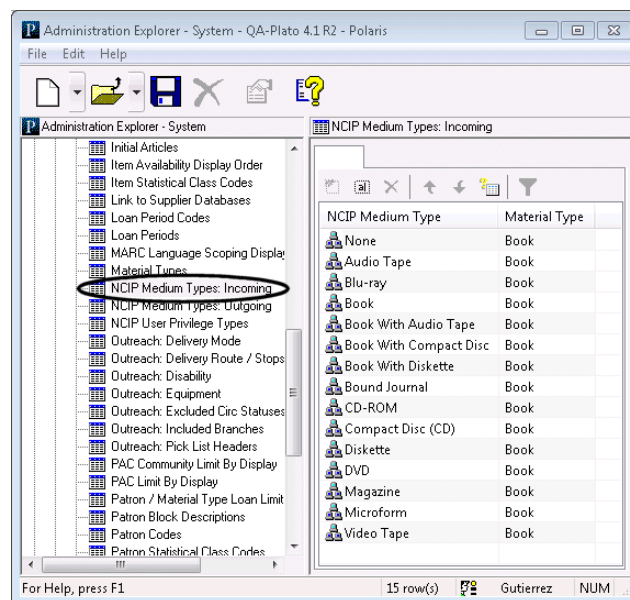


3. Select an NCIP Medium Type from the list and click **OK**.

You can assign none, one, or more than one item material type to each NCIP medium type, but an item material type can be assigned to only one NCIP medium type. The default NCIP medium type is Book. If you select **None** for the Medium Type, the item material type cannot be assigned to that medium type and will not be eligible for ILL requests.

4. Select **File, Save** to save your changes.
5. In the **Policy Tables** folder for the system, select **NCIP Medium Types: Incoming**.

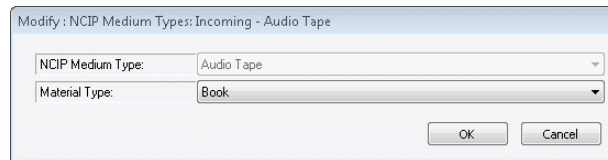
The NCIP Medium Types: Incoming policy table is displayed in the details view.



This table maps NCIP Medium types to Polaris item material types for incoming requests, and is used for requests where the Polaris library is the borrower. This table allows the library to create ILL items with different material types.

6. To map an NCIP medium type to a Polaris item material type, double-click the NCIP medium type.

The Modify dialog box appears.



7. Select a Polaris item material type from the list and click **OK**.

The default item material type is ID 01 (typically Book, but your library may assign a different material type to ID 01 in the Material Types policy table; see [“Defining Material Types”](#) on page 198).

8. Select **File, Save** to save your changes.

Related Information

- [“Mapping Patron Codes to NCIP User Privilege Types”](#) on page 28

User-Defined Fields in Patron Records

Your patron records can include up to five user-defined fields (UDFs). All five are searchable with the Polaris Find Tool. UDFs can be used for additional identification purposes and as criteria for detecting duplicate patron records.

Note:

Your library may allow users to log on to PAC using network credentials instead of the Polaris patron barcode or username and password. If so, a UDF should be defined for the patron's network username. For details, see ["Active Directory Log-On to PAC"](#) in the *Polaris Public Access Administration Guide 4.1R2*

The UDFs are set up when Polaris is implemented. At the system level, you can define UDFs as free-text fields where staff members type text, or as drop-menu options. If you define UDFs as drop-menu options, they appear in drop-menu list boxes everywhere UDFs can be selected.

The screenshot shows the 'Patron Registration - 357291 - General - Polaris' window. The 'Registration' sidebar is on the left. The main area is divided into 'General' and 'User defined fields'. The 'General' section includes fields for Barcode (987654321), Last name (Farsadi), First name (Timothy), Middle name (James), Title, Suffix, Gender (Male, Female, N/A), Statistical class (None), Password (masked), Language (English), Former barcode, Birth date (3/15/1953), Date of original registration (2/10/2010), Last activity date (7/7/2011 11:52:27 AM), and checkboxes for 'Exclude from collection agency', 'Exclude from overdue notice', 'Exclude from hold notice', 'Exclude from billing', 'Maintain reading list', 'E-mail notices in plain text', and 'Do not delete patron record'. The 'User defined fields' section is highlighted with a red box and contains a list of fields: ID Number, Privileges / Restrictions, Voter Registration, CybraryN Use Only (XXX,YYY), and Not Currently In Use.

The text of drop-menu options can be edited, and the options can be deleted provided they are not used in any patron records. Individual branches can specify which drop-menu UDF options to display, determine the order of display, and designate default values to be used during patron registration, express registration, and online registration from the PAC.

Note:

If you plan to use collection agency services, you may need a UDF to identify the guardian of a minor patron. For more information, see ["Managing Collection Agency Services"](#) on page 259.

See the following topics:

- [“Scanning a Driver’s License for Patron Registration”](#) on page 36
- [“View and convert user-defined fields for patron records”](#) on page 37
- [“Set drop-menu user-defined fields for organizations”](#) on page 40

Scanning a Driver’s License for Patron Registration

California libraries can enter information for a new patron in the patron record by scanning the “2D” barcode on a California driver’s license or ID.

Normal barcode scanners will not read data from a driver’s license. The license data is stored in a 2D (two-dimensional) format using PDF417 barcode symbology. Polaris has tested and recommends the Datalogic Gryphon™ I GD4430 USB scanner. However, most 2D PDF417 USB wedge-type scanners should work.

Note:

This “Driver’s License Scan Facility” feature is separately licensed in Polaris.

A free-text Polaris user-defined field must be designated for the driver’s license number. By default, Polaris will use UDF 1. If your library uses a different UDF for the driver’s license, contact your Polaris Site Manager to change the UDF.

Note:

The designated user-defined field must be a free text field. If it is changed to a drop-menu field in Polaris Administration, the registration data is entered appropriately when the driver’s license barcode is scanned, but the ID number is not entered in the user-defined field on the patron record.

When the driver’s license is scanned during patron registration, the following driver’s license information is entered in the appropriate fields in the patron record:

- Name (Last, First Middle)
- Street address (up to two lines)
- City
- State
- Postal code

Note:

The address information is entered in the Home address fields in the Patron Registration workflow.

- Birth date
- Gender
- License number (entered in the designated user-defined field)

For registration instructions using this method, see [“Scan driver’s license to enter patron information”](#) in the *Polaris Patron Services Guide 4.1R2*.

Technical Notes

- The Gryphon scanner must be programmed before use to add a suffix of \$ to the driver's license barcode.
- The code requires the file **DriversLicenseParser.js**. When the Polaris staff client is installed, the folder **ProgramData\Polaris\[version]\Scripts** is created. The file **DriversLicenseParser.js** must be placed in the **Scripts** folder.

Contact your Polaris Site Manager for technical assistance.

1-2-3

View and convert user-defined fields for patron records

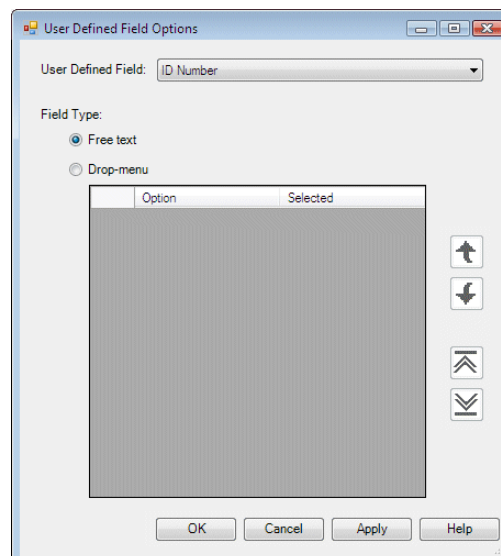
Follow these steps to view the user-defined fields (UDFs) that have been set up for your Polaris system, set up the options for drop-menu UDFs, and convert UDFs from one type to the other.

Note:

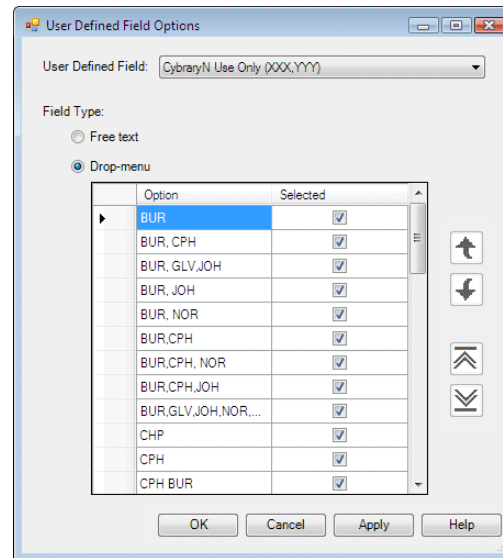
Initial values in drop-menu UDFs are derived from your existing data. You can edit them and add more values if necessary. See the following procedure. When existing text UDFs are converted to drop lists, the options will be available only at branches that have used the corresponding text value.

1. In the Administration Explorer tree view, expand the System folder.
2. Select **Profiles**, and select the **Patron Services** tab.
3. Double-click **Patron registration user defined fields**.

The User Defined Field Options dialog box opens.



The **User Defined Field** drop-down list contains the UDFs that were set up at implementation. You can select a UDF to determine if it is defined as free-text or drop-menu on the Patron Registration workform and other appropriate system workforms. Drop-menu UDFs display the possible options defined for them. (Individual branches can select options for use and set the display order. See [“Set drop-menu user-defined fields for organizations”](#) on page 40.)



4. To convert a free-text UDF to a drop-menu UDF, follow these steps:

- a) Select the free-text UDF in the **User Defined Field** list.
- b) Select **Drop-menu**.

All the free-text values currently entered in patron records for this UDF are listed as drop-menu options; by default, all are selected as eligible for use by individual organizations.

Note:

If you are converting a free-text UDF with more than 500 unique entries, a message offers you the opportunity to continue or cancel the conversion. Large numbers of values may take some time to convert.

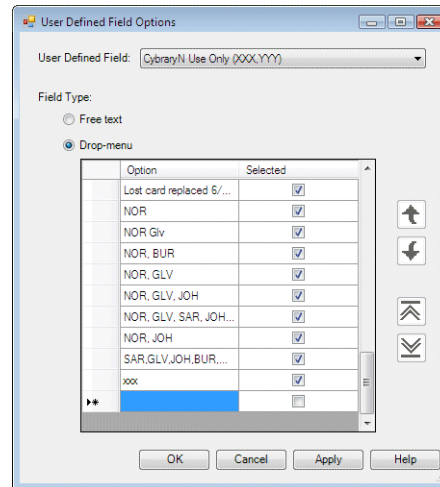
- c) Click **OK**. (You must click **OK** before you modify any of the drop-menu options.)

Note:

You can also convert a drop-menu UDF to free text. In this case, all patron records using the options for the drop-menu UDF retain the option text as free-text in the appropriate UDF field.

5. To add an option for a drop-menu UDF, follow these steps:

- a) Select the drop-menu UDF in the **User Defined Field** list.
- b) Scroll the list of options to the bottom (blank) entry in the list.



c) Double-click the blank field and type the new option in the space.

You can type up to 64 alpha-numeric characters (letters and numbers).

Note:

A drop-menu option cannot be blank except in new records where an option has not yet been chosen or when it is cleared in bulk change. To indicate that no value is selected, set up an option with the text **None**.

d) Click **Apply**.

6. To edit a drop-menu UDF option, follow these steps:

a) Select the drop-menu UDF in the **User Defined Field** list.

b) Double-click the option and type the new text over the old.

c) Click **Apply**.

All patron records and defaults using the old option will be updated with the option's new text.

Note:

You can also delete a drop-menu option as long as it is not currently being used in a patron record or as an organizational default setting for the UDF. Simply uncheck the option's **Selected** check box.

7. Click **OK** to save your changes and close the dialog box.

Important:

If you make any UDF changes, you must log out and log back in to the Polaris staff client to see the effects of your changes in Polaris workforms.

Related Information

- **Organizational drop-menu UDF options** - See [“Set drop-menu user-defined fields for organizations”](#) on page 40.
- **Organizational default values for UDFs** - See [“Set patron record required fields and default values”](#) on page 41.
- **Minor patrons and collection agency services** - Collection agency processing may require a UDF that identifies the guardian of a minor patron. See [“Reporting Minors”](#) on page 262.

1-2-3

Set drop-menu user-defined fields for organizations

After the drop-menu user-defined fields have been set up at the system level, you can set which options will appear in each organization's UDF drop menus and the order in which they should appear. Follow these steps to select drop-menu options for an organization.

1. In the Administration Explorer tree view, expand the organization's folder.
2. Select **Profiles** for the organization, and select the **Patron Services** tab.
3. Double-click **Patron registration user defined fields**.

The User Defined Field Options dialog box opens.

4. Select the drop-menu UDF in the **User Defined Field** list.

The drop-menu's options are listed.

5. Select or de-select the check boxes to choose the options you want to appear in the organization's version of the UDF drop menu.

Note:

For new UDFs, if an option is selected and saved at the system level, it is selected at all branches. If it is saved as unselected at the system level, it is unselected for all branches.

Tip:

First move the de-selected options to the bottom of the list. This may make it easier to move the selected options to the order you want.

6. To change the order in which the options will appear in the organization's UDF drop menu, highlight an option and select the up arrow  or down arrow  to move the option up or down in the list. To move an option to the top, click . To move an option to the bottom, click .

7. Click **OK**.

Important:

When you make UDF changes, you must log out and log back in to the Polaris staff client to see the effects of your changes in Polaris workflows.

Related Information

- **System-level drop-menu UDF options** - See [“View and convert user-defined fields for patron records”](#) on page 37.
- **Organizational default values for UDFs** - See [“Set patron record required fields and default values”](#) on page 41.

Setting Patron Registration Defaults and Requirements

The Patron Services parameter **Patron registration options** sets required fields and default values for patron records. When a staff member starts a new patron record, the Patron Registration workform opens with the default values, and the required fields are displayed in bold type. This parameter is available at the system, library, and branch level.

See the following topic:

- [“Set patron record required fields and default values”](#) on page 41

1-2-3

Set patron record required fields and default values

Follow these steps to set required fields and default values for patron records.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Patron registration options**.

The Patron Registration Options dialog box - General Defaults tabbed page appears. You can set default values for any or all fields on the Patron Registration Options dialog box.

The screenshot shows the 'Patron registration options' dialog box with the 'General defaults' tab selected. The dialog contains several fields for setting defaults:

- Registered at:** A dropdown menu showing 'Community Library (Co)'.
- Language:** A dropdown menu showing 'English'.
- Patron code:** A dropdown menu showing 'Regular'.
- Notification:** A dropdown menu showing 'Email Address'.
- Statistical class:** A dropdown menu.
- E-mail notices in plain text:** A checkbox that is currently unchecked.
- Expiration term:** A text box with '3' and a dropdown menu with 'years'.
- Address check term:** A text box with '1' and a dropdown menu with 'years'.
- Postal Code:** A text box with '13088' and a dropdown menu with 'USA'.
- Phone 1 Area Code:** A text box with '315'.
- eReceipts:** A section with two checkboxes: 'E-mail receipts' (unchecked) and 'TXT receipts' (unchecked).

At the bottom of the dialog are four buttons: 'Save', 'Cancel', 'Apply', and 'Help'.

3. Select a library branch in the **Registered at** box.

If no branch is selected, the patron registration workform defaults to the workstation branch.

4. Select a code in the **Patron Code** box.

Note:

Patron codes are used to define available services, loan periods, fines, and limits for specific classes of patrons. The available patron codes are set in the Patron Codes policy table. See ["Defining Patron Codes"](#) on page 23.

5. Select a class in the **Statistical Class** box.

The **Statistical Class** box lists the defined classes for the selected branch.

Note:

Statistical class codes are used for reporting purposes. The available codes are set in the Patron Statistical Class Codes policy table. See ["Defining Patron Statistical Codes"](#) on page 393.

6. Select a language in the **Language** box.

This setting controls the default selection in a new patron record. If you have purchased Polaris licenses for additional languages, you can enable multi-lingual notices and have the notice sent in the language specified in the patron record. See ["Managing Notification"](#) on page 399.

Note:

If you need additional language selections for patron records, contact your Polaris Site Manager.

7. Select a default method for notifying patrons in the **Notification** box.

This setting controls the default selection in a new patron record. When you set up notification, you can specify the notification method for each specific notice type, including patron preference. In this case, the notice is sent by the method specified in the patron record unless your library chooses to override the preference for certain types of notices. See ["Managing Notification"](#) on page 399.

8. If you plan to send e-mail notices of any kind to patrons, and want to send these as plain text by default, check **E-mail notices in plain text**.

This setting controls the default selection in a new patron record. Individual patron records can set that patron's preference for plain text or HTML e-mail notices.

9. If you plan to offer eReceipts as an option to patrons who prefer these to printed receipts, and you want to set one or both of these options by default in new patron records, check **E-mail receipts**, **TXT receipts**, or both.

If you check both options, the default patron record setting for eReceipts is **ALL**; that is, the patron would receive both e-mail and TXT receipts. For more information about eReceipts, see ["Setting Up eReceipts"](#) on page 190.

10. Type an area code (three digits) in the **Phone 1 Area Code** box.

11. Use one of the following methods to set an expiration term. This is the time that the patron's registration expires:
 - To set a precise date, select **exact date** in the second **Expiration term** box, and type a date in the first box using the format mm/dd/yyyy.
 - To set a date relative to the current date (such as two years from today), select **months** or **years** in the second **Expiration term** box, and type a number in the first box.
12. Use one of the following methods to set an address term. This is the time that the patron's address should be checked:
 - To set a precise date, select **exact date** in the second **Address check term** box, and type a date in the first box using the format mm/dd/yyyy.
 - To set a date relative to the current date (such as two years from today), select **months** or **years** in the second **Address check term** box, and type a number in the first box.
13. Select a country in the second **Postal Code** box, if necessary.
14. Type a postal code in the first **Postal Code** box.

This setting controls the default values in the **Postal Code**, **City**, **State/province**, and **County** boxes on the Add/Edit Address dialog box for patron records.

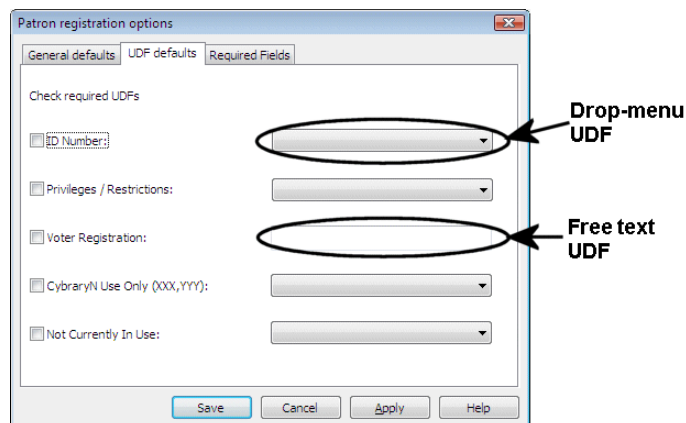
15. On the UDF Defaults tabbed page, select the check box next to each UDF that should be required for creating patron records.

User-defined fields are set up at Polaris implementation, using a Patron Services profile at the system level. See "[User-Defined Fields in Patron Records](#)" on page 35.

Note:

Required UDFs are determined by the patron's registered branch. If the registered branch is changed in an existing patron record, the required UDFs change to those of the new registered branch.

16. For free-text UDFs, type text in each UDF box for which you want to specify default text.



17. (Optional) For drop-menu UDFs, select an option in each UDF drop-menu for which you want to specify a default option.

Note:

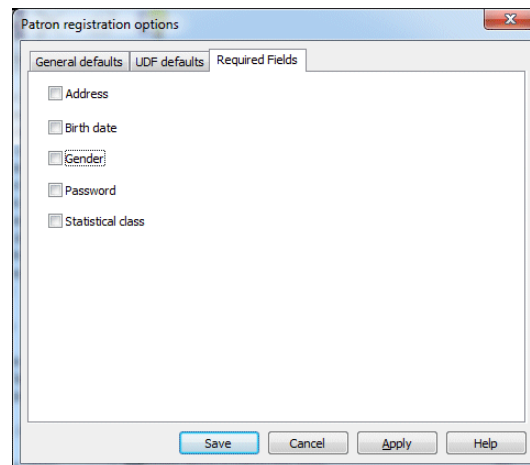
If you require a drop-menu UDF but do not specify a default option, the field is blank in a new record but the user must select an option.

18. On the Required Fields tabbed page, select the check box next to each additional field (**Address**, **Birth date**, **Gender**, **Password**, **Statistical class**) that you want to require for creating patron records. (These do not apply to offline registration, and are not checked when patron records are bulk-changed or merged.)

Note:

When the **Gender** option is checked for the patron's registration branch, the staff member must select either **M** or **F** in the **Gender** field during patron registration. If **N/A** is selected, a message is displayed when the staff member attempts to save the record. The field label appears in bold to indicate it is required.

These fields are always required in new patron records: **Barcode**; **Last name**; **First name**; **Registered at**; **Patron code**; **Expiration term/date**; **Address check term/date**; **Notification option** and corresponding notification field (for example, **Phone 1** and the telephone number).



19. Click **Save** on the Patron Registration Options dialog box.

Related Information

- **Default patron passwords** - A step in the nightly Patron Processing SQL job can assign the last four digits of the patron's primary telephone number (**Phone 1**) to the password field of the patron record if a password does not exist. The default password step is disabled at installation; if you are interested in activating this feature, contact your Polaris Site Manager. For more information about patron passwords, see "[Patron Passwords and User Names](#)" in the *Polaris Patron Services Guide 4.1R2*.

- **Express registration** - You can set separate defaults and required fields for express registration at check-out. See [“Setting Express Registration Defaults and Requirements”](#) on page 46.
- **Online registration from PAC** - You can allow patrons to register online from the PAC, and set a birth date requirement and default values for online registration. See [“Set up online patron self-registration”](#) in the *Polaris Public Access Administration Guide 4.1R2*.

Setting Express Registration Defaults and Requirements

The Patron Services parameter **Express patron registration options** controls the required fields and default values for express patron registration at check-out. These requirements and defaults can be different from those used for ordinary registrations. When a staff member express-registers a patron, the Express Registration workform opens with the default values, and required fields are displayed in bold type. The parameter is available at the system, library, and branch levels.

See the following topic:

- “[Set express registration default values and required fields](#)” on page 46

1-2-3

Set express registration default values and required fields

Follow these steps to set required fields and default values for express registration.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Express patron registration options**.

The Express Patron Registration Options dialog box, General Defaults tabbed page appears. You can set default values for any or all fields on the Express Patron Registration Options dialog box.

The screenshot shows the 'Express patron registration options' dialog box with the 'General defaults' tab selected. The dialog contains several settings for express registration. The 'Enable Express Registration' checkbox is checked. Other settings include 'Registered at' (Community Library (Co.)), 'Language' (English), 'Patron code' (Regular), 'Notification' (Email Address), 'Statistical class' (empty), 'Expiration term' (3 years), 'Address check term' (1 year), 'Postal Code' (12043 USA), and 'Phone 1 Area Code' (315). There are also checkboxes for 'Add block to verify patron', 'E-mail notices in plain text', and 'eReceipts' (E-mail receipts, TXT receipts). Buttons for 'Save', 'Cancel', 'Apply', and 'Help' are at the bottom.

3. Select the **Enable Express Registration** check box to allow staff with the appropriate permission to express-register patrons.

All boxes on the dialog box become available for editing.

4. Select the **Add block to verify patron** check box to add a Verify Patron block to each record created through express registration.

When this option is selected, an express-registered patron is blocked at the next check-out. A staff member then verifies details in the patron record and removes the block. See [“Resolve a Verify Patron block”](#) in the *Polaris Patron Services Guide 4.1R2*.

5. Select a code in the **Patron Code** box.

The available patron codes are set in the Patron Codes policy table. See [“Defining Patron Codes”](#) on page 23.

6. Select a library branch in the **Registered at** box.

If no branch is selected, the patron registration workform defaults to the workstation branch.

7. Select a class in the **Statistical Class** box.

The **Statistical Class** box lists the defined classes for the selected branch. See [“Defining Patron Statistical Codes”](#) on page 393.

8. Select a language in the **Language** box.

This setting controls the default selection in a new patron record, but another language can be selected at registration.

Note:

If you have purchased Polaris licenses for additional languages, you can enable multi-lingual notices and have the notice sent in the language specified in the patron record. See [“Managing Notification”](#) on page 399.

9. Select a method for notifying patrons in the **Notification** box.

This setting controls the default selection in a new patron record, and the default notification preference for patrons who register online (patron self-registration). However, if the value is set to **None**, the default value for PAC registration will be **Mailing Address** (print). If the value is set to **Fax**, **Telephone 2**, or **Telephone 3**, the default value for PAC registration will be set to Telephone 1 (displayed as **Telephone** in the PAC).

When you set up notification, you can specify the notification method for each specific notice type, including patron preference. In this case, the notice is sent by the method specified in the patron record. See [“Managing Notification”](#) on page 399.

10. If you plan to send e-mail notices of any kind to patrons, and want to send these as plain text by default, check **E-mail notices in plain text**.

This setting controls the default selection in a new patron record. Individual patron records can set that patron’s preference for plain text or HTML e-mail notices.

11. If you plan to offer eReceipts as an option to patrons who prefer these to printed receipts, and you want to set one or both of these options by default in new patron records, check **E-mail receipts**, **TXT receipts**, or both.

If you check both options, the default patron record setting for eReceipts is **ALL**; that is, the patron would receive both e-mail and TXT receipts. For more information about eReceipts, see [“Setting Up eReceipts”](#) on page 190.

12. Type a telephone area code (three digits) in the **Voice Phone 1 Area Code** box.
13. Use one of the following methods to set an expiration term. This is the time that the patron’s registration expires:
 - To set a precise date, select **exact date** in the second **Expiration term** box, and type a date in the first box using the format mm/dd/yyyy.
 - To set a date relative to the current date (such as two years from today), select **months** or **years** in the second **Expiration term** box, and type a number in the first box.
14. Use one of the following methods to set an address check term. This is the time that the patron’s address should be checked:
 - To set a precise date, select **exact date** in the second **Address check term** box, and type a date in the first box using the format mm/dd/yyyy.
 - To set a date relative to the current date (such as two years from today), select **months** or **years** in the second **Address check term** box, and type a number in the first box.
15. Select a country in the second **Postal Code** box, if necessary.

16. Type a postal code in the first **Postal Code** box.

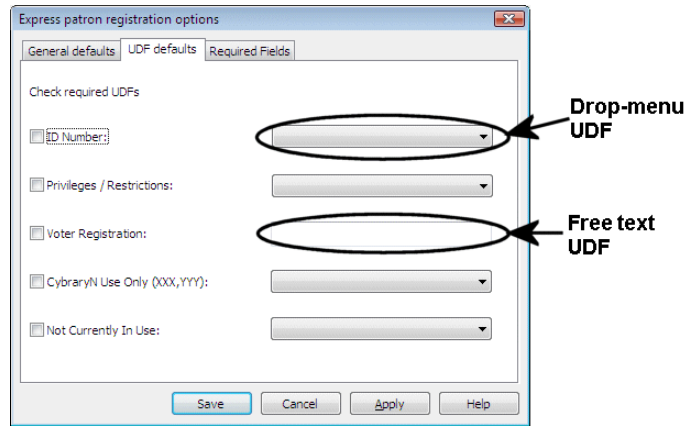
This setting controls the default values in the **Postal Code**, **City**, **State/province**, and **County** boxes on the Add/Edit Address dialog box for patron records.

17. On the UDF Defaults tabbed page, select the check box next to each UDF that should be a required field for creating patron records.

Note:

User-defined fields are set up at Polaris implementation, using a Patron Services profile at the system level. See [“User-Defined Fields in Patron Records”](#) on page 35.

18. For free-text UDFs, type text in each UDF box for which you want to specify default text.



19. (Optional) For drop-menu UDFs, select a default option.

Note:

If you require a drop-menu UDF but do not specify a default option, the field is blank in a new record but the user must select an option.

20. On the Required Fields tabbed page, select the check box next to each field (**Address**, **Birth date**, **Gender**, **Password**, **Statistical class**) that you want to require for creating patron records.
21. Click **Save** on the Express Patron Registration Options dialog box.

Related Information

Online registration from PAC - You can allow patrons to register online from the PAC, and set requirements and default values for online registration. See [“Set up online patron self-registration”](#) in the *Polaris Public Access Administration Guide 4.1R2*.

Charging for Patron Registration

If your library wants to charge registration fees to certain types of patrons, such as temporary, seasonal, or non-resident users, you can set up registration fees by patron code. The fee is applied automatically when patrons with the specified patron code register or renew their registrations, and their patron accounts are blocked until the fee is paid. Registration fees are applied according to the settings of the registration branch.

See the following topics:

- [“Staff Client Workflow”](#) on page 50
- [“Patron Block for Registration Fee”](#) on page 51
- [“Expired Registration”](#) on page 51
- [“Offline Workflow”](#) on page 51
- [“PAC Registration”](#) on page 51
- [“Polaris ExpressCheck”](#) on page 52
- [“Set patron registration fees”](#) on page 52

Staff Client Workflow

If a fee has been defined for the patron code, a Registration Fee dialog box appears when a staff member selects **Save** in the new patron record. The dialog box displays the amount of the fee and the following options:

- **Pay** - The staff member must have the permission **Fines: Pay fines at circ** to accept payment for the registration fee. The Pay dialog box opens and displays all current payment methods, including credit card payments if the organization has implemented these. Partial payments are possible. If a fee is partially paid, a block is placed on the patron account (see [“Patron Block for Registration Fee”](#) on page 51). If the option to print a receipt was selected, a receipt prints.
- **Waive** - The staff member must have the permission **Fines: Waive fines at circ**. A waive transaction is written to the patron account, and a receipt prints if the receipt option was selected.
- **Charge** - The charge is written to the patron account. The charge reason is listed as **Registration fee**.
- **Print Receipt** - This option is selected by default. Receipts are printed according to the printer and driver set up for the Check Out workflow printer. It is not necessary to check any specific receipt type on the Check-out options dialog box, but the printer and driver must be defined. The information printed on the receipt is that selected for fine receipts with the Patron Services parameter **Fine receipt options**.

Patron Block for Registration Fee

If the fee is charged to the patron account or only partially paid, a system block (**Patron registration fee**) is placed on the patron account. The block is cleared when the total charge amount is paid. As with other blocks, clicking on the block text from the Patron Blocks dialog box opens the Patron Account view. The permission **Override circ blocks** is required to override the block at check-out.

Expired Registration

If the expiration date in the patron record is reset (the registration is renewed), and the patron code requires a registration fee, the system displays the Registration fee dialog box as for a new registration. If the patron code is changed to non-chargeable at renewal, the fee dialog box is not displayed.

Note:

If a new patron record is saved with a chargeable patron code and then changed to a non-chargeable code, no action is taken on the patron account. If the fee was paid, the payment transaction will remain. If the fee was charged, the charge will remain on the patron account. The registration fee and block remain until staff pay or waive the charge.

Offline Workflow

If a new patron record is created offline and the patron code is a chargeable type, the fee is charged to the patron account and the **Patron Registration Fee** block is placed on the patron record. The offline upload file includes a note in the entry for the registration.

PAC Registration

As part of the PAC registration process, the patron selects a home branch. The home branch's default settings are used to create the new patron registration. If the default patron code set for PAC registration is a chargeable code, the program displays a message to the patron. The default message is **Your library account will be charged a [\$] registration fee. Do you want to continue?** The message text can be customized or translated with Polaris WebAdmin (Language Editor).

If the patron chooses to continue, the fee is charged to the patron account and the Patron Registration Fee block is placed on the record.

Note:

There is no option to renew an expired patron registration from PAC.

Polaris ExpressCheck

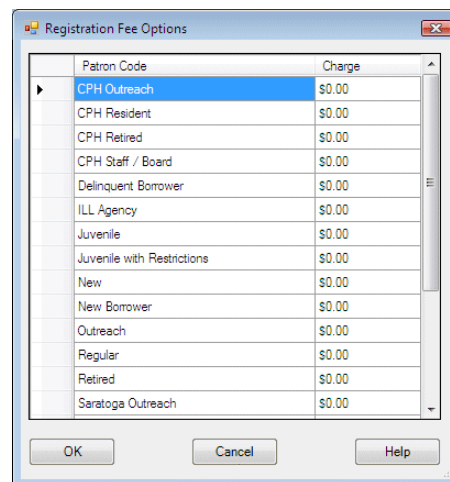
Patrons can renew an expiring registration at the Polaris ExpressCheck workstation if the option **Permit registration renewal if patron record expires** is selected in the parameter **Polaris ExpressCheck: Enable**. If the patron code is a chargeable type according to the options set for the patron's registered branch, the program displays the message for an expired patron record and does not offer an option to renew. The patron must renew the registration at the circulation desk.

1-2-3

Set patron registration fees

Follow these steps to specify which patron codes should be charged registration fees.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Registration fee options** to display the Registration Fee Options dialog box.



The dialog box lists the patron codes that have been selected for use at this organization (see [“Defining Patron Codes”](#) on page 23). The default setting for each patron code is \$0.00 (no charge).

3. Select the patron code for which you want to set a fee.
4. Click the charge for the selected patron code and type the new amount in the format shown in the dialog box.

You can set a separate fee for each patron code you select.

5. Click **OK**.

Setting Patron Duplicate Detection

When you save a patron record, Polaris automatically checks for duplicate records. Polaris always checks the patron name fields (first and last names), birthdate, and barcode for matches. You can set Polaris to check the following *additional* patron record fields for matching criteria:

- Phone 1
- E-mail address
- Any two user-defined fields (UDFs)

A match on any of these optional fields triggers a duplicate detection match. For example, if **Phone 1** is selected, a matching phone number triggers a duplicate detection match, even if the patron names do not match.

A duplicate is a character-for-character match of the complete field. However, if the field contains only one character, the system does not detect these records as duplicates. This prevents unnecessary and false duplicate detection in cases where a library has used an asterisk or another single character to flag certain records.

The system also uses the birth date to check for duplicate patron records to distinguish record that might otherwise be consider a match. For example, if there are two patrons named John Smith, a match is only detected if the birthdates are identical as well. If no birth date is supplied, duplicate checking uses only the existing criteria.

Note:

When a birth date is included in PAC self-registration, the system uses the birth date to check for duplicate patron records, in addition to the first name and last name. If no birth date is supplied, duplicate checking uses only the first and last names. Use the PAC profile **Patron Access options** to require a birth date entry for patron registration from PAC. For more information, see ["Set up online patron self-registration"](#) in the *Polaris Public Access Administration Guide 4.1R2*.

When possible duplicate records are detected, the Duplicate Patrons dialog box displays a list of the possible duplicates. To conserve system resources, the list is limited to 500 entries per duplicate detection criterion. For example, if 1,000 patrons have the same e-mail address and 30 have the same phone number, 530 possible duplicate records are listed.

Use the Patron Services parameter **Duplication detection options** to select one or more of the optional duplicate-checking fields. This parameter is available at the system, library, and branch level. The system uses the registration library's settings.

See the following topic:

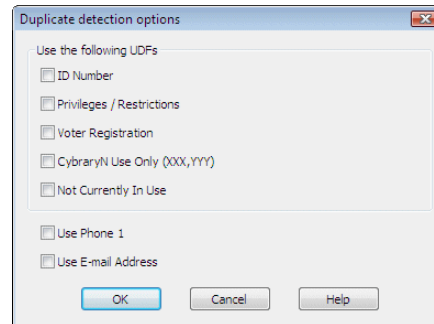
- ["Set optional patron duplicate detection fields"](#) on page 54

1-2-3

Set optional patron duplicate detection fields

Follow these steps to specify which patron record fields (in addition to the patron name, barcode, and birth date if any) are checked during duplicate detection.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Duplication detection options** to display the Duplicate Detection Options dialog box.



3. Select the check boxes for the additional patron record fields that the system should check for matching criteria.

You can select a maximum of four fields, including no more than two user-defined fields (UDFs).

4. Click **OK** on the Duplicate Detection Options dialog box.

The Administration Explorer appears.

5. Select **File, Save** to save your changes.

Setting Reading History Options

Your library can save a reading history for a patron's account. In the staff client, this list is displayed on the Patron Status workform - Reader Services view. (The Circulation permission **Patron Status: Display reader services** is required to view a patron's reading history on the Patron Status workform.) When reading histories are enabled for a patron's registered branch, patrons can also view their reading histories by accessing their patron accounts through the PAC. The reading history contains basic information for each item the patron has checked out since the reading history was started.

Use the Patron Services parameter **Reading history** to enable reading histories, set the amount of time an entry remains in the reading history, and set the maximum number of entries that can be retained in the reading history at once. The parameter is available at the system, library, and branch level. After the parameter is set, staff can start reading histories for specific patrons. See ["Working with Reading Histories"](#) in the *Polaris Patron Services Guide 4.1R2*.

Important:

If your system includes Polaris Outreach Services, reading histories are automatically enabled for outreach services patrons, regardless of the **Reading History** parameter setting. Separate settings control reading history limits for outreach services patrons. See ["Set reading history limits for outreach patrons"](#) on page 487. For more information about outreach services workflows, see ["Outreach Services Processing"](#) in the *Polaris Patron Services Guide 4.1R2*.

See the following topics:

- ["Enable reading histories"](#) on page 55

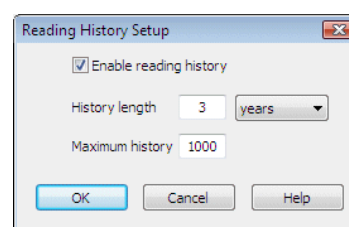
1-2-3

Enable reading histories

Follow these steps to enable and limit patron reading histories.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Reading history**.

The Reading History Setup dialog box appears.



3. Select (check) **Enable reading history** to allow Polaris to save reading histories for patrons.
4. Specify the length of time (from check-out date to current date) to retain an entry in the Reading History list:
 - a) Type the number of months or years in the first **History length** box.
 - b) Select the unit of time (months or years) in the second **History length** box.
5. In the **Maximum history** box, type the maximum number of items that can be retained at one time in the Reading History list.

Note:

An entry's creation date in the reading history is usually, but not always, the check-out date. For example, offline uploads may cause some variation. Also, Polaris does not consider the exact time of check-out. If the **Maximum history value** is exceeded, and several items were checked out on the same date, Polaris deletes the items from the reading history in an unspecified order.

6. Click **OK** on the Reading History Setup dialog box.
7. Select **File, Save** to save your changes.

Related Information

- **Reading history limits for outreach services patrons** - See [“Set reading history limits for outreach patrons”](#) on page 487.
- **Start and stop histories for specific patrons** - See [“Working with Reading Histories”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Allow patrons to start and stop reading histories from the PAC** - Set the Patron Services profile **Patron can enable/disable reading history** to **Yes**. This setting applies when reading histories are enabled for the organization and the patron is not an Outreach Services patron.
- **Stop all reading histories** - To stop recording all reading histories, clear the **Enable reading history** check box on the Reading History Setup dialog box. When the check box is cleared, new reading histories cannot be created, and existing histories are not incremented. However, existing individual histories are not cleared. If a reading history is stopped from the patron record, the patron's existing history is cleared.
- **Allow staff members to remove items from reading histories** - Staff members with the Circulation permission **Reading history: Remove non-ORS patron history entries: Allow** can remove individual items from the reading histories of non-outreach services patrons. Staff members with the Circulation permission **Reading history: Remove ORS patron history entries: Allow** can remove individual items from the reading histories of outreach services patrons. See [“Working with Reading Histories”](#) in the *Polaris Patron Services Guide 4.1R2* for details.
- **Allow patrons to remove individual items from reading histories** - Set the PAC profile **Patrons can remove reading history** to **Yes**. The setting affects both PowerPAC and Mobile PAC. The system uses the setting for the patron's registered branch. When a patron removes an item from the reading history, the item is also removed from the reading history list in the staff client (Patron Status workform - Reader Services view).

Setting Up Patron Messages

Staff members with the appropriate permissions can post predefined or free-text messages to specific patron accounts. The messages are posted from the Patron Registration workform or posted and managed from the Patron Status workform - Notes view, and patrons can read and delete them from the PAC patron account. In Polaris Administration, you set up the predefined messages, translate them into Polaris PowerPAC licensed languages if necessary, and set an automatic expiration period for patron messages.

See the following topics:

- [“Patron Messages in the Staff Client”](#) on page 57
- [“Patron Messages in PAC”](#) on page 57
- [“Set up patron messages in Polaris Administration”](#) on page 58

Patron Messages in the Staff Client

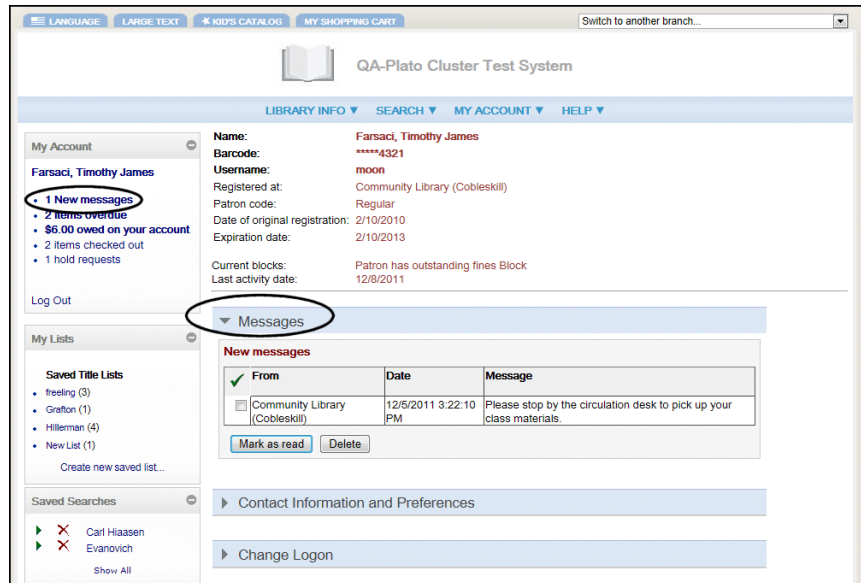
Staff members need the organizational-level Circulation permission **Post patron message: Allow** to post or modify messages in a patron account, and the system-level Circulation permission **Delete patron message: Allow** to delete messages. To post a message from the Patron Registration workform, select **Tools, Post Message**. To post a message from the Patron Status workform - Notes view, click **Add Message** in the message area of this view.

If a patron has unread messages, an alert message appears in the Patron Blocks dialog box during check-out. Staff members can continue the check-out operation or cancel it, or click the block text to open the Patron Status workform - Notes view. The alert message does not place any blocks on patron activity in the PAC.

For detailed staff client procedures, see [“Posting Patron Messages”](#) in the *Polaris Patron Services Guide 4.1R2*.

Patron Messages in PAC

The My Record page in the PAC patron account displays a Messages drawer that the user clicks to expand the Messages area. The side portion of every page of the patron account also displays counts of new and read messages that are convenient links to open the Messages area of the account. When the Messages area is expanded, the patron can check messages and mark them as read or delete them.



When a patron marks a message as read, the status is noted in the Patron Status workform - Notes view in the staff client. When a patron deletes a message, the message is also deleted from the Patron Status workform - Notes view. (Messages are also automatically removed according to the expiration period set in Polaris Administration.)

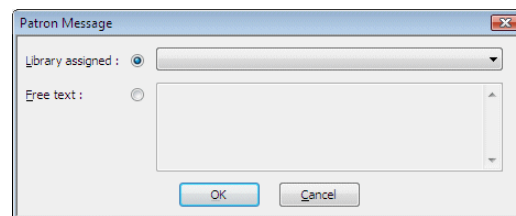
Note:

Patrons can also view their messages in the patron account on SIP self-check workstations if the SIP provider supports this feature. They may also print on the SIP checkout receipt. Messages are shortened to 250 characters if necessary, and they cannot be marked as read or deleted.

1-2-3

Set up patron messages in Polaris Administration

The messages you define in Polaris Administration are available for selection in the **Library assigned** list when a staff member posts a message to a patron account.

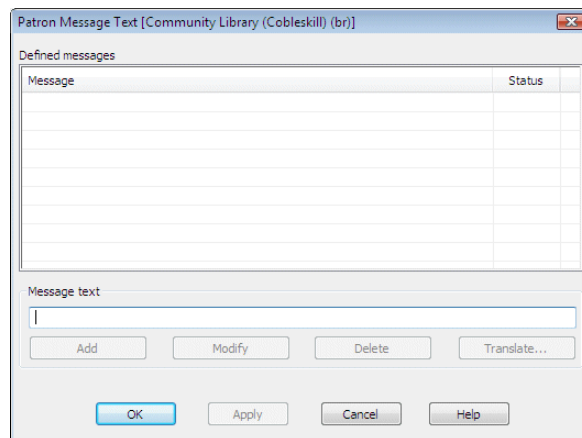


Follow these steps to set up patron messages.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.

2. Double-click **Patron message text: Configure**.

The Patron Message Text dialog box appears.



3. To add a message, follow these steps:

a) Type up to 250 characters in the **Message text** box.

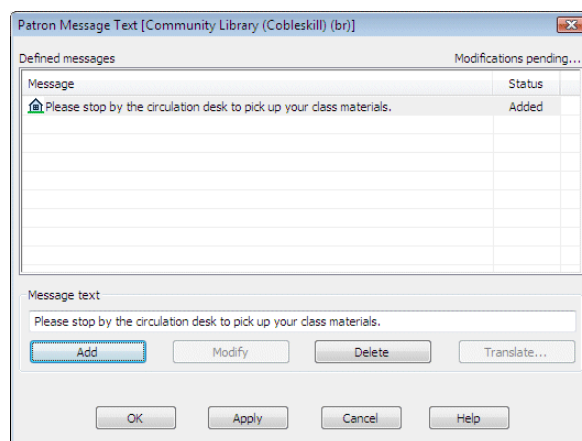
Your message can include alpha-numeric and special characters, and URLs.

b) Click **Add**.

The message is added to the list with an icon that indicates the organizational level at which it was added.

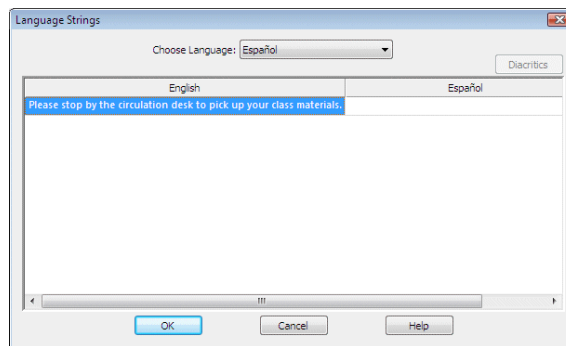
Note:

The **Message** list includes all the messages added at the system and parent library levels as well as the branch level. The appropriate organizational icon indicates the level at which the message was added. To add a message from a parent organization for use by your organization, click the message. The text appears in the **Message text** box. Then click **Add**. Only messages defined at your organizational level can be modified or translated.

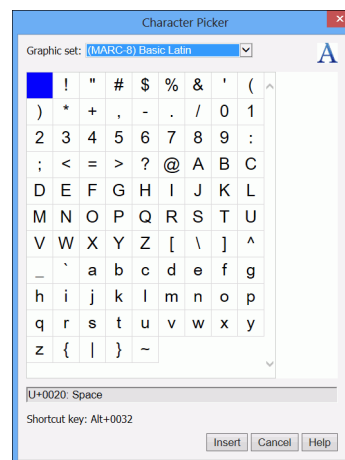


c) Click **Apply** to save your changes and continue to work with this dialog box, or click **OK** to save your changes and close the dialog box.

4. To modify an existing message, follow these steps:
 - a) Select the message in the Messages list.
The message is displayed in the **Message Text** box.
 - b) Edit the message in the **Message Text** box.
 - c) Click **Modify**.
The modified message is placed in the Messages list.
 - d) Click **Apply** to save your changes and continue to work with this dialog box, or click **OK** to save your changes and close the dialog box.
5. To translate an existing message, follow these steps:
 - a) Select the message in the Messages list and click **Translate**.
The Language Strings dialog box opens.



- b) Select a language from the **Choose language** list.
The options are the languages licensed for Polaris PowerPAC.
- c) Type your translation in the language column next to the English equivalent.
- d) To insert a diacritic character, click **Diacritics**.
The Character Picker dialog box opens.



Select a graphic character set, select the character, and click **Insert**. For details on choosing diacritic characters, see “[Choose characters/diacritics from a chart](#)” in the *Polaris Cataloging Guide 4.1R2*.

The Character Picker dialog box closes.

- e) Click **Apply** to save your changes and continue to work with the Patron Message Text dialog box, or click **OK** to save your changes and close the dialog box.
6. To delete a message, follow these steps:
- a) Select the message in the Messages list.
 - b) Click **Delete**.

If the message is linked to any patron record, a warning message is displayed. You can cancel the deletion or continue to delete the message. If you delete it, it is removed from any patron accounts where it is currently posted.

- c) Click **Apply** to save your changes and continue to work with the Patron Message Text dialog box, or click **OK** to save your changes and close the dialog box.
7. To set an expiration period for patron messages, follow these steps:
- a) Double-click the Patron Services parameter **Patron message text: Expiration period** for the organization.
 - b) Set the number of days (0-99) that a message should remain in a patron account (unless it is manually deleted).

After a message has been posted for the time period you set, it is automatically deleted.

Note:

The time is counted from 11:59 on the day the message is created through 11:59 or after of the final day. (The exact time depends on when the automatic deletion job runs.) For example, if the time limit is 5 days, a message created at 2:00 p.m. on Monday will expire at or after 11:59 p.m. Saturday. The period is not affected if the message text is modified. However, if the expiration period is changed, all messages are immediately affected. For example, reducing the expiration period may cause some messages to expire immediately and shorten the life of others.

- c) Select **File, Save** from the Administration Explorer menu bar.

Related Information

Staff procedures - See “[Posting Patron Messages](#)” in the *Polaris Patron Services Guide 4.1R2*.

Setting Up Patron Photos

From the Patron Photo view in the Patron Record workform, staff members can take a photo, replace an old photo with a new one, upload an existing image file, or delete the photo from the patron record. If the workstation is set to display the photo, it also appears on the Check Out workform with the other patron information. (The patron's photo does not appear in the PAC.)

Workstations used to process patron photos require a Windows-compatible webcam and associated software. Follow the installation instructions that accompany the webcam.

Note:

You cannot install webcam software on a thin client (terminal server environment) or use it via Remote Desktop, so you cannot take new patron pictures by these means. However, if the pictures are loaded from another source or captured on a conventional workstation with webcam software, they are displayed normally in terminal server and Remote Desktop environments.

For information about taking and editing patron photos, see [“Working with Patron Photos”](#) in the *Polaris Patron Services Guide 4.1R2*.

See the following topics:

- [“System Administration Settings”](#) on page 62
- [“Importing Photos from an Existing Database”](#) on page 63
- [“Replace the default photo”](#) on page 63

System Administration Settings

The Patron Services profile **Display photo ID** controls the display of patron photos in the Patron Record workform and the Check Out workform. The profile is available at the system, library, branch, and workstation levels, and is set to **Yes** by default.

The following system-level Circulation permissions control the ability to work with patron photos in the Patron Photo view of the Patron Registration workform:

- **Modify photo IDs**
- **Delete photo IDs**

The permissions are not automatically granted at installation, so you must specifically assign them or supply a supervisor override. (The permissions do not affect the photo display in the Check Out workform.)

Importing Photos from an Existing Database

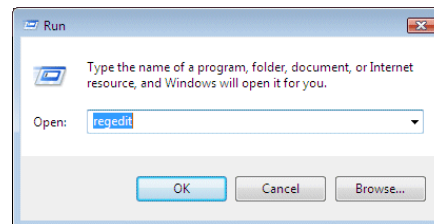
A set of existing patron photos can be imported into Polaris in a batch. Imported or uploaded images are limited to one megabyte (1 MG) each. Contact your Polaris Site Manager for more information.

1-2-3

Replace the default photo

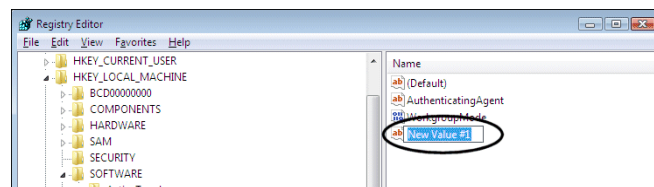
You can use a custom image as the default photo instead of the Polaris logo by editing the registry. Follow these steps.

1. From the Start menu, select **Run** and type **regedit**.

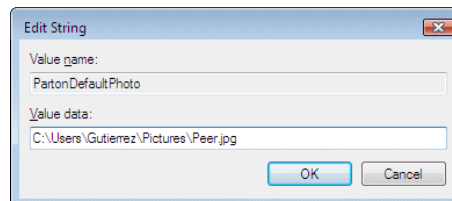


The Registry Editor opens.

2. In the Registry Editor, select **HKEY_LOCAL_MACHINE, Software, Polaris, [version], Clients**.
3. Right-click in the Clients pane (right side of the Explorer) and select **New, String Value** from the context menu.
4. Type **PatronDefaultPhoto** in the string value name box and press **ENTER**.



5. Double-click the new string value and type the complete path for your image file in the Edit String dialog box. Then click **OK**.



When you open a patron registration workform, or the Check Out workform without a photo, your custom default image is displayed instead of the Polaris logo.

Setting Options for Deleting Patron Records

When a patron record is deleted, it is permanently removed from the Polaris database. You can manually delete patron records (see [“Deleting Patron Records”](#) in the *Polaris Patron Services Guide 4.1R2*) or you can specify criteria whereby patron records are automatically deleted each night.

With either method, you can specify blocks that prevent certain records from being deleted.

Note:

Staff must have the following Circulation permissions to delete patron records and override blocks to deletion: **Patron registration: Delete**, and **Patron registration: Override blocks to delete**.

You can set Polaris to automatically delete patron records that have been inactive for a specified number of days. If you set Polaris to immediately delete unblocked records that meet this criterion, you can also choose to place any blocked records in an exceptions record set. You should regularly review this record set. If you do not want any records to be deleted immediately, set Polaris to place all the records that are candidates for deletion, both blocked and unblocked, in a record set where they can be reviewed. After review, some records may be edited and retained, while others may be manually deleted from within the record set.

Note:

Automatic deletion is accomplished through a nightly SQL job, Patron Delete. The job is not enabled by default. For details, see [“Polaris SQL Jobs Reference”](#) in the *Polaris Administration Guide 4.1R2*.

Records that are blocked from automatic deletion, whether placed in a record set or not, are deleted automatically when the circumstances that prevented deletion no longer exist. System-assigned circulation blocks prevent automatic deletion. Library-assigned or free-text circulation blocks do not prevent automatic deletion.

The Patron Services parameter **Patron delete options** sets the criteria that affect both manual and automatic deletion of patron records. The parameter is available at the system, library, and branch level.

Note:

Even when a patron record is manually deleted in the Polaris staff client, it is not immediately removed from the database. Instead, the barcode is modified and the name, address, e-mail address, and user-defined fields are made blank, and the record is not returned in Find Tool search results. The altered record is then deleted as part of the nightly Patron Processing SQL job. This process optimizes staff client performance, and does not affect the settings, procedures, and conditions for automatically and/or manually deleting patron records described here.

See the following topics:

- [“Retaining Financial Information for Deleted Patron Records”](#) on page 65
- [“Set options for deleting patron records”](#) on page 66
- [“Set blocks for patron record deletion”](#) on page 68

Retaining Financial Information for Deleted Patron Records

Certain patron account data from deleted patron records is saved in separate database tables for the period specified in the Patron Services parameter **Account transaction deletion**. If an associated item record is also deleted, the item record ID, barcode, title, author, and material type are retained. This process ensures the accuracy of the following reports even when the transacting patron records have been deleted:

- Daily Cash Balance Detail
- Daily Cash Drawer
- Daily Cash Drawer POS
- Billed Patrons
- Fines and Fees
- Fines and Fees Summary
- Non-POS Payments

Note:

The Daily Cash Balance Detail, Daily Cash Drawer, and Daily Cash Drawer POS reports can use retrospective data dating back to the beginning of the calendar year during which Polaris 4.0 was installed. The other reports listed here use only data from patron records deleted after Polaris 4.0 was installed. This is because these reports include both charge and payment transactions, and the retrospective data does not include charges.

The saved data is then purged according to the parameter setting in the nightly Patron Processing job. For example, if the setting for **Account transaction deletion** is two years, any data older than two years is purged when the job runs. For more information about setting the **Account transaction deletion** parameter, see [“Setting Patron Accounting Options”](#) on page 70. For more information about the cash reports, see [“Patron Financial Reports”](#) in the *Polaris Basics Guide 4.1R2*.

1-2-3

Set options for deleting patron records

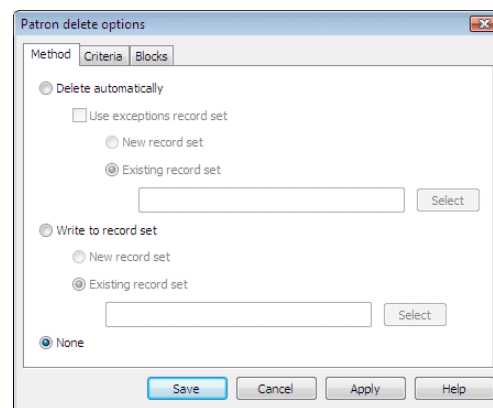
Follow these steps to set up automatic patron record deletion.

Important:

If you plan to place deleted records in a record set for later review, you must set up the record set before you do this procedure. See ["Creating and Using Record Sets"](#) in the *Polaris Basics Guide 4.1R2*.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Patron delete options**.

The Patron Delete Options dialog box appears with the Method tabbed page displayed.



3. To turn off automatic deletion completely, so that patron records are not deleted automatically under any circumstances, click **None** and go to step 10.
4. If you want Polaris to delete all patron records that are not blocked from deletion, click **Delete automatically**.

The **Use exceptions record set** check box is available. If you want Polaris to place blocked records in a record set, do the following steps:

- a) Select the **Use exceptions record set** check box.

The **Existing record set** option is selected, indicating that blocked records are placed in an existing record set. (The **New record set** option is not currently functional.)

- b) Click **Select** to search for and select the existing record set in which records are placed.

5. If you want Polaris to place *all* patron records (blocked and unblocked) in a record set for review and manual deletion, click **Write to record set**.

The **Existing record set** option is selected, indicating that all records are placed in an existing record set. (The **New record set** option is not currently functional.)

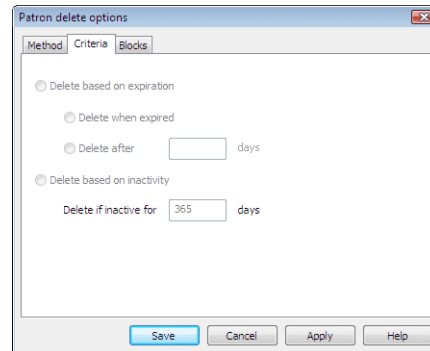
Note:

If you click **None**, Polaris does not run automatic processing for patron record deletion.

6. If you clicked **Write to record set**, click **Select** to search for and select the existing record set in which records will be placed.
7. If you selected **Delete automatically** or **Write to record set**, click **Criteria** to display the Criteria tabbed page.

Note:

The **Delete based on expiration** option is not currently functional.



8. In the **Delete if inactive for days** box, type the number of days for which a patron record must be inactive to be automatically deleted.

Note:

The **Last Activity Date** field in the patron record tracks patron activity. It is updated in the following circumstances. *Staff client*: item check-out; renewal; quick-circ item check-out; when a claim is made on an item, when a charge is paid. *PAC*: log-in to patron account; placing and modifying hold and ILL requests; online renewal; patron information updates; payments; access to remote databases that require log-in. *Polaris ExpressCheck*, *SIP self-check units*: check-out and renewal; patron account access; payments. *Time and print management applications*: log-in. *Inbound telephony*: Access account information and renew items. It is also updated when payments are made on the patron's account.

9. Click **Save** on the Patron Delete Options dialog box.

Related Information

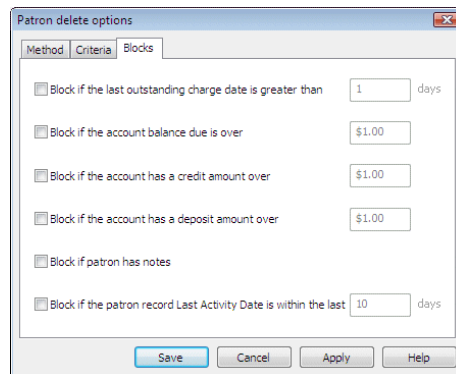
- **Working with patron record sets** - See [“Creating and Using Record Sets”](#) in the *Polaris Basics Guide 4.1R2* and [“Bulk-Changing Patron Records”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Preventing record deletion** - See [“Set blocks for patron record deletion”](#) on page 68.
- **Purging patron ID information from transactions** - [“Removing Patron ID Information from Transaction Files”](#) on page 79.

1-2-3

Set blocks for patron record deletion

Follow these steps to specify when Polaris blocks patron records from automatic or manual deletion.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Patron delete options** to display the Patron Delete Options dialog box, Method tabbed page.
3. Click the **Blocks** tab to display the Blocks tabbed page.



4. Specify the situations that should prevent a record from being deleted:
 - **Outstanding charge** - Select the **Block if the last outstanding charge date is greater than days** check box, and type the number of days.
 - **Account balance** - Select the **Block if the account balance due is over** check box, and type the amount.
 - **Credit balance** - Select the **Block if the account has a credit amount over** check box, and type the amount.
 - **Deposit balance** - Select the **Block if the account has a deposit amount over** check box, and type the amount.
 - **Notes in patron record** - Select the **Block if patron has notes** check box. This setting applies to both non-blocking and blocking notes.
 - **Last activity date** - Select the **Block if the patron record Last Activity Date is within the last . . . days** check box, and type the number of days. This option blocks manual deletion if the last activity date is within the specified period. It does not apply to automatic deletion.

Note:

The **Last Activity Date** field in the patron record tracks patron activity. It is updated in the following circumstances:

- Staff client*: item check-out; renewal; quick-circ item check-out; when a claim is made on an item, when a charge is paid.
- PAC*: log-in to patron account; placing and modifying hold and ILL requests; online renewal; patron information updates; payments; access to remote databases that require log-in.
- Polaris ExpressCheck, SIP self-check units*: check-out and renewal; patron account access; payments.
- Time and print management applications*: log-in.
- Inbound telephony*: Access account information and renew items.

5. Click **Save** on the Patron Delete Options dialog box.

Setting Patron Accounting Options

Certain Patron Services parameters control what options are available for handling financial transactions in patron accounts:

- **Credit for overpayment** - Controls whether staff members can accept an overpayment on charges and place a credit on the patron's account. The charges are paid, and the credit can then be carried on the account or refunded to the patron.
- **Distributed waives** - Controls whether a specified waived amount can be deducted from every charge on the patron's account. If a particular charge is greater than or equal to the waived amount, the specified waived amount is deducted from the charge. If a charge is less than the specified waived amount, no action is taken.
- **Account transaction deletion** - Controls how long finished transactions are listed in the patron's transaction summary. A deposit or charge transaction is considered finished when the outstanding amount is 0. Your settings for this parameter apply to all patrons registered at the branch. This setting also determines how long some patron account data from deleted patron records is saved for certain financial reports. See [“Retaining Financial Information for Deleted Patron Records”](#) on page 65.

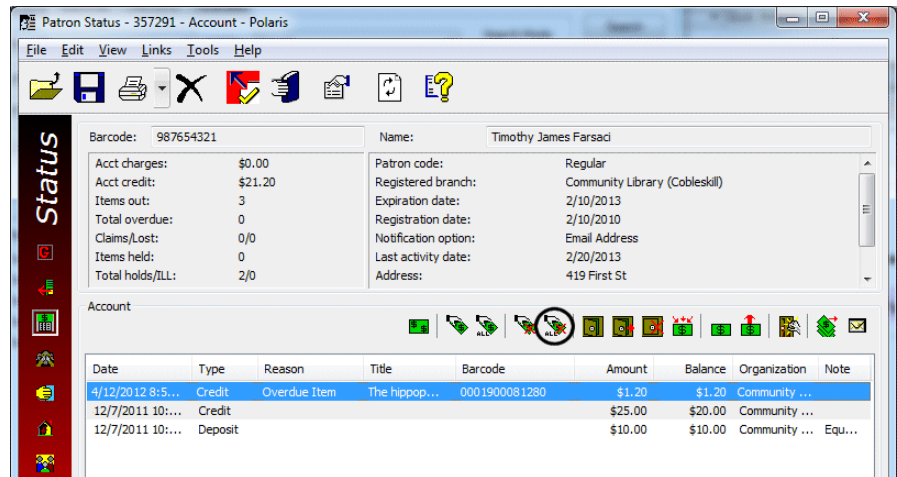
These parameters can be set at the system, library, or branch level. At the system level, you can also set Polaris to waive fines automatically at check-out or renewal. You may want to waive fines automatically at check-out for items that are overdue on one patron's account, but “recovered” when the item is being checked out to another patron. At renewal, you can set Polaris to waive the fine on an overdue item if the same patron is renewing the item. See [“Set Polaris to waive fines at check-out or renewal”](#) on page 73.

See the following topics:

- [“Waive All Option in the Patron Status Workform - Account View”](#) on page 71
- [“Set patron accounting options”](#) on page 72
- [“Set Polaris to waive fines at check-out or renewal”](#) on page 73

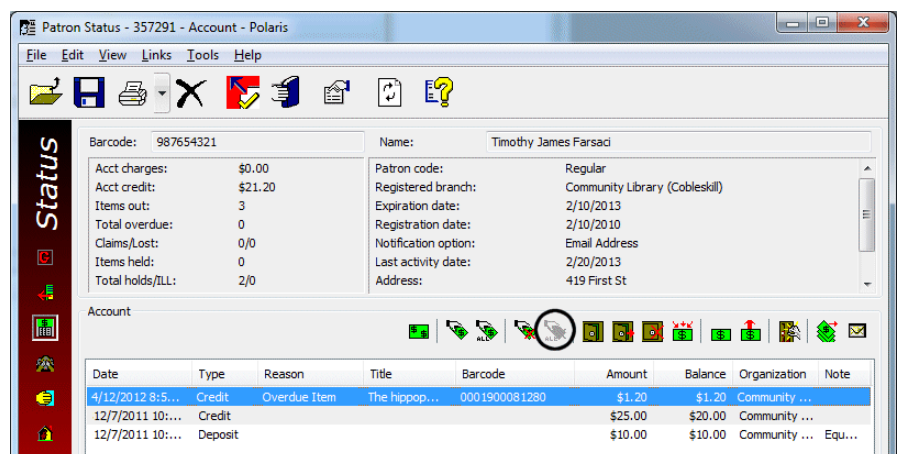
Waive All Option in the Patron Status Workform - Account View

By default, the Waive All icon and shortcut key are available for use in the Patron Status workform - Account view. When the permitted staff member clicks the icon, all of the patron's fines are waived.



You can choose to make the Waive All icon and shortcut key unavailable for use. In Polaris Administration, set the Patron Services parameter **Waive All displays** to **No**. The parameter is available at the system, library, and branch levels. The system uses the setting of the workstation's logged-on branch.

This setting makes the icon and shortcut key unavailable and prevents staff members from accidentally waiving all fines with a single click.



Note:

The **Waive All displays** parameter setting affects only the Waive All icon display and shortcut key function. It does not affect a staff member's permission to waive fines.

1-2-3

Set patron accounting options

Follow these steps to set Polaris to accept patron overpayments as credits, distribute waivers, automatically waive fines at check-out or renewal, and limit the transactions listed in the patron's transaction summary.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.

2. To allow credit for overpayment to be carried on patron accounts, double-click **Credit for overpayment**, and select **Yes**.

If this parameter is set to **No**, when an overpayment is accepted, the charge is paid and a message prompts the staff member to refund the difference.

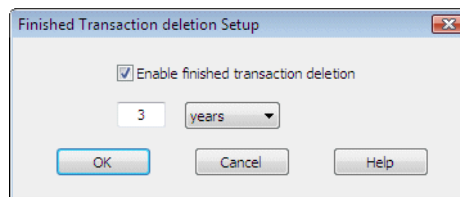
3. To allow a specified amount to be waived from multiple charges, double-click **Distributed waivers**, and select **Yes**.

If this parameter is set to **No**, the **Distributed waive** option is not available on the Waive dialog box when a charge is being waived.

4. To limit how long transactions are listed in a patron's transaction summary, follow these steps:

- a) Double-click **Account transaction deletion**.

The Finished Transaction deletion setup dialog box appears.



- b) Select (check) **Enable finished transaction deletion**.

- c) Select **years** or **months**, and type the number of years or months that transactions should be retained.

Most finished deposit or charge transactions older than the period you specify will be deleted from patron transaction summaries, including charges for lost/billed items. However, the following transactions remain in the transaction summary, regardless of your setting: payments that have been refunded or credited, including lost-and-paid transactions that were refunded or credited; deposits that have been credited; any transaction associated with a credit; any transactions that occur for patron accounts currently in collection.

Important:

After the cut-off date, all completed transactions are removed from the system, *including lost-and-paid transactions*. Set this parameter to a minimum of one year, for example, if you reimburse patrons for lost-and-paid material when the material is found within a year.

Note:

This setting also determines how long some patron account data from deleted patron records is saved for certain financial reports. See [“Retaining Financial Information for Deleted Patron Records”](#) on page 65.

5. Click **OK** on the dialog box.
6. Select **File, Save**.

Related Information

- **Permission to create a credit manually** - Staff members must have the permission **Create a patron account credit: Allow** to create a credit manually for a patron account. For more information, see [“Setting Circulation Permissions”](#) on page 6.
- **Permission to distribute a waived amount** - If you allow distributed waivers, staff members who set up the waived amount need the permission **Fines: waive fines at circ: Allow**. For more information, see [“Setting Circulation Permissions”](#) on page 6.

1-2-3

Set Polaris to waive fines at check-out or renewal

Follow these steps to waive fines automatically when an overdue item is recovered at check-out to another patron, or when a patron renews an overdue item.

1. In the Administration Explorer tree view, open the **Parameters** folder for the *system*, and select the **Patron Services** tabbed page in the details view.
2. To have Polaris automatically waive fines on items recovered at check-out, double-click **Overdues: Clear fine if recovered at check-out**, and select **Yes**.

If this parameter is set to **No**, the fine remains in the account of the patron who incurred the overdue charge and the item is checked out to the new patron.

3. To have Polaris automatically waive fines on items being renewed, double-click **Overdues: Clear fine if recovered at renewal**, and select **Yes**.

If this parameter is set to **No**, the fine remains in the patron's account when the patron renews the item.

4. Select **File, Save**.

Setting Payment Method Options

When a staff member accepts a payment from a patron, the staff member selects a payment method such as **Cash** or **Check** to describe the payment. Use the Payment Methods policy table to display or suppress the following payment method options for use in the staff client:

- **Cash**
- **Check**
- **Collection agency**
- **Credit card**
- **Credit card - Manual**
- **Debit card**
- **Smart card**
- **Voucher**

For example, if you do not use a collection agency, you can suppress this option from display. Additionally, if your library does not have an integrated solution but offers a non-integrated payment option, you can select **Credit card - Manual** to make this option available in the staff client when taking payments. Libraries that already have an integrated solution will leave the **Credit card - Manual** option unselected in the Payment Methods table. You can also set the order in which the options are displayed in the payment dialog boxes.

Note:

The **Credit card - Manual** option does not make credit card payments possible from PAC or MPAC.

The payment options you select in the policy table appear in the following situations:

- **Pay dialog box** - Paying charges from the Patron Status workform - Patron Account view (if the patron account has a credit, **Pay from credit** is an automatic option); paying overdue charges when renewing an item from the Patron Status workform - Items Out view; paying charges when checking in an item; paying overdue charges when renewing an item from the Check Out workform
- **Declare lost item dialog box** - Paying charges when declaring an item lost from the Patron Status workform - Items Out view
- **Create credit dialog box** - Creating a credit from the Patron Status workform - Patron Account view (**Collection agency** option does not apply to this situation)
- **Create deposit dialog box** - Creating a deposit from the Patron Status workform - Patron Account view (**Collection agency** option does not apply to this situation)

Payment methods can be set from the system, library, and branch organization levels in the Administration Explorer. However, you specify the options for each branch. When you open the table at the system level,

you can view and change entries for any branch. At the library level, you can view and change entries for the branches associated with the library. At the branch level, you can view and change entries for the selected branch.

Note:

These System Administration permissions are required to modify this table:

Access administration: Allow, Access tables: Allow, Modify payment methods table: Allow.

See the following topic:

[“Display or suppress payment methods” on page 75](#)

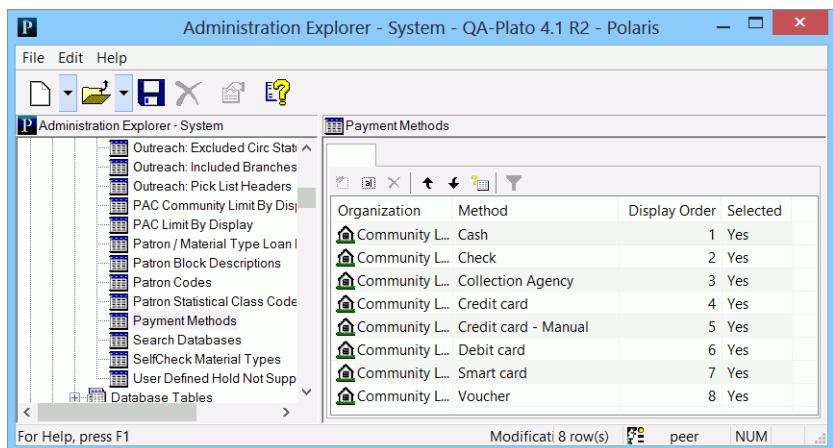
1-2-3

Display or suppress payment methods

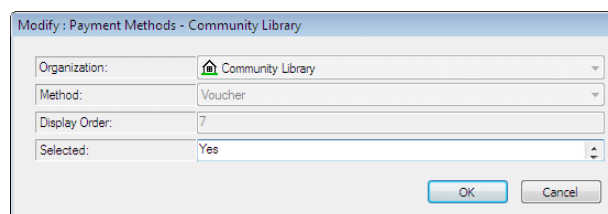
Follow these steps to display or suppress payment methods, and set the order in which they are displayed for staff selection.

1. In the Administration Explorer, open the **Policy Tables** folder for the organization, and select **Payment Methods**.

The Payment Methods table is displayed in the details view. By default, all payment methods are set to be displayed. The default display order is alphabetical.



2. Select the branch/method combination to display or suppress.
3. Click  to display the Modify Payment Methods dialog box.



4. In the **Selected** box, select **Yes** to display the method as an option, or select **No** to suppress the method from display.

Note:

Polaris does not currently support debit card payments, and you should suppress this option for all branches. If you accept credit card payments, and your provider processes debit cards as credit cards, staff members should select **Credit card** or **Credit card - Manual** as the method for a debit card payment.

5. Click **OK** on the dialog box.
6. To set the display order of the payment methods, select a branch/ payment method and click the up arrow  to move the option higher in the list, or click the down arrow  to move it lower in the list.

Your changes affect all the dialog boxes that display the payment methods for that branch.

7. Select **File, Save** to save your changes.

Related Information

- **Set fine amounts** - See [“Setting Fine Amounts”](#) on page 233.
- **Credit card transactions** - See [“Setting Up E-Commerce”](#) on page 85.

Date Sources in Patron Records

The date sources (server or client workstation) for patron record transactions are as follows:

Note:

For more information about time and locale consistency among servers and workstations, see [“Ensuring Locale and Time Consistency”](#) in the *Polaris Administration Guide 4.1R2*.

See the following topics:

[“Creating Patron Records Online”](#) on page 77

[“Creating Patron Records Offline”](#) on page 77

[“Modifying a Patron Record from Patron Registration Workform \(Online Only\)”](#) on page 78

Creating Patron Records Online

- The registration date defaults to the server date in the Patron Registration workform. (The expiration date and address expiration date are calculated from this date.)
- The creation date in the patron record properties sheet uses the server date.
- The transaction date for a patron registration fee is the server date.
- TransactionHeaders.TranClientDate uses the server date when the creation transaction is queued.
- TransactionHeaders.TransactionDate uses the server date when the creation transaction is processed from the queue.
- In TransactionDetails, where the TransactionSubTypeID is 187 (Patron Registration Date), the value is the client workstation date.

Creating Patron Records Offline

- The registration date defaults to the offline workstation date in the Patron Registration workform. (The expiration date and address expiration date are calculated from this date.)
- The creation date in the patron record properties sheet uses the offline workstation date.
- The transaction date for a patron registration fee is the offline workstation date.
- TransactionHeaders.TranClientDate uses the offline workstation date when the creation transaction is queued.
- TransactionHeaders.TransactionDate uses the server date when the creation transaction is processed from the queue.

- In TransactionDetails, where the TransactionSubTypeID is 187 (Patron Registration Date), the value is the offline workstation date.

Modifying a Patron Record from Patron Registration Workform (Online Only)

- TransactionHeaders.TranClientDate uses the server date when the modification transaction is queued.

Deleting a Patron Record (Online Only)

- TransactionHeaders.TranClientDate uses the server date when the deletion transaction is queued.

Removing Patron ID Information from Transaction Files

Polaris records system transactions in transaction log files that are used for reporting, trouble-shooting, and system tracking purposes. Many circulation and patron accounting transactions are associated with specific patrons, and the log files that record these transactions store the specific patron IDs associated with the transactions. Using the Patron Services parameter **Remove patron ID from circ transactions**, you can purge this patron-specific information from your transaction records after a time period you specify. The same settings also purge patron IDs from item record histories. A nightly SQL job, `PurgePatronIDFromCircTransactions`, purges the patron IDs from the transactions according to your settings.

Important:

Patron IDs are not removed from transactions generated by the system unless this feature is enabled at the system level.

See the following topics:

- [“Circ Transactions from Which Patron IDs Are Purged”](#) on page 79
- [“Remove Patron ID Report”](#) on page 82
- [“Set up patron identification purging”](#) on page 83

Circ Transactions from Which Patron IDs Are Purged

The table lists the transactions from which patron IDs are purged if you choose to enable this feature.

Note:

The obsolete transaction IDs listed in the table are no longer used but may still exist in your transaction records.

<i>Transaction Type ID</i>	<i>Transaction Description</i>
2000	OBSOLETE: Dummy2
2001	Patron registration created
2002	Patron registration deleted
2003	Patron registration modified
2010	OBSOLETE: Dummy3
2011	OBSOLETE: Renewal Overdue Block
2012	OBSOLETE: Renewal Overdue Block Override
2013	OBSOLETE: Dummy4
2020	OBSOLETE: Dummy5
2030	OBSOLETE: Dummy6

<i>Transaction Type ID</i>	<i>Transaction Description</i>
2040	OBSOLETE: Dummy7
2050	OBSOLETE: Dummy8
2060	OBSOLETE: Dummy9
2070	OBSOLETE: Dummy101
2080	OBSOLETE: Charge
2081	OBSOLETE: Alter Charge
2082	OBSOLETE: Dummy11
2083	OBSOLETE: Dummy12
2084	OBSOLETE: Dummy135
2085	OBSOLETE: Dummy14
2090	OBSOLETE: Add hold request
2091	OBSOLETE: Reactivate hold request
2092	OBSOLETE: Cancel hold request
2093	OBSOLETE: Satisfy hold request
2094	OBSOLETE: Ship item for hold
2095	OBSOLETE: Receive item for hold
2096	OBSOLETE: Deny item for hold
2097	OBSOLETE: Bibliographic hold
2098	OBSOLETE: Serial issue hold
2099	OBSOLETE: Item specific hold
2111	OBSOLETE: Trap item for hold
2112	OBSOLETE: Trap hold renew cancelled
2130	OBSOLETE: New patron
2140	OBSOLETE: Patron registration updated
2150	OBSOLETE: Patron check out or renewal block
2160	OBSOLETE: Block override
2170	OBSOLETE: Barcode changed
2183	OBSOLETE: Claim block
2184	OBSOLETE: Claim block override
2185	OBSOLETE: Claim cancelled
2186	OBSOLETE: Claim block
2187	OBSOLETE: Claim block override
2200	PAC Patron Logon
3109	Polaris Fusion download file
3201	Community profile deleted
3202	Community profile created
3203	Community profile modified
6001	Check out
6002	Check in

<i>Transaction Type ID</i>	<i>Transaction Description</i>
6005	Hold request created
6006	Holds become held (item received for hold request)
6007	Holds become expired
6008	Holds become unclaimed
6009	Holds become denied
6010	Holds become pending
6011	Holds become not supplied
6012	Holds become shipped
6013	Holds become cancelled
6014	Patron accounting charge
6015	OBSOLETE: Patron accounting payment partial
6016	Patron accounting payment
6017	OBSOLETE: Patron accounting waive partial
6018	Patron accounting waive
6019	Patron accounting deposit
6020	OBSOLETE: Patron accounting return partial
6021	Patron accounting return
6022	OBSOLETE: Patron accounting credit partial
6023	Patron accounting credit
6024	OBSOLETE: Patron accounting forfeit partial
6025	Patron accounting forfeit
6026	Item claimed lost
6027	Item claimed never had
6028	Item claimed returned
6033	ILL Request created
6034	ILL Request become active
6035	ILL Request received
6036	ILL Request returned
6037	ILL Request become cancelled
6038	Patron accounting refund
6039	Hold satisfied (item checked out to patron)
6040	Patron accounting auto waive
6041	Patron accounting charge void
6042	Patron accounting payment void
6043	Patron accounting waive void
6044	Patron accounting deposit void
6045	Patron accounting return void
6046	Patron accounting credit void
6047	Patron accounting forfeit void

<i>Transaction Type ID</i>	<i>Transaction Description</i>
6048	Patron accounting refund void
6049	Patron accounting auto waive void
6050	Patron Claims: Reset total claim count
6091	Invalid checkout
6092	Invalid checkin
7000	eCommerce Payment

Remove Patron ID Report

When you enable patron ID purging, you can run a report to track the number of patron IDs purged during a time period you specify. Select **Utilities, Reports and Notices** from the Polaris Shortcut bar, select **Circulation** in the Polaris Reports dialog box, and double-click **Remove Patron ID from circ transactions process log**. For details, see [“PAC Reports”](#) in the *Polaris Basics Guide 4.1R2*.

1-2-3

Set up patron identification purging

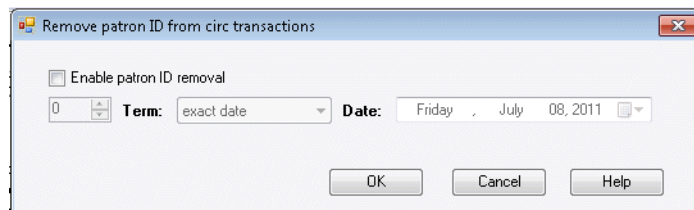
Follow these steps to enable automatic purging of patron identification information from transaction logs and item record histories after a specified time period.

Note:

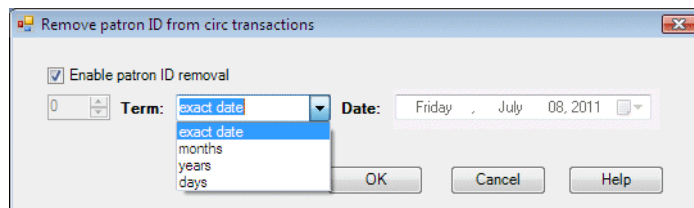
These settings are available at the system, library, and branch levels. Patron identification information is removed from transactions and item record histories according to the transacting branch's settings (not according to the settings of the patrons' registered branches). The transacting branch is identified in the transaction header **OrganizationID** field. Patron IDs are not removed from transactions generated by the system unless this feature is enabled at the system level

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Patron Services** tab in the details view.
2. Double-click **Remove patron ID from circ transactions**.

The Remove patron ID from circ transactions dialog box opens.



3. Select (check) **Enable patron ID removal**.



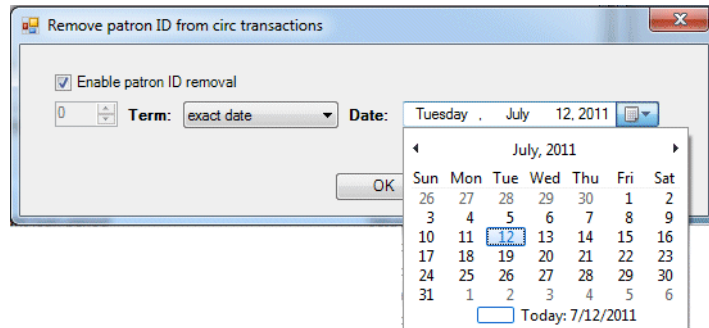
The **Term** options become available.

4. Select an interval or select a date:
 - Select **months**, **years**, or **days** in the **Term** box, and set the appropriate number. For example, if you set the term to **2 years**, patron identification information is kept for two years following the date of the transaction, then purged from the transaction database and item record histories. The program identifies transactions from which to remove patron information by counting back the number of days starting from beginning of the day it runs (12:00 midnight) through the final day (12:00 midnight).

Example:

The term is set to 30 days. When the program runs on the night of August 30, it will count back from midnight August 30 through the full day to midnight July 31. The patron ID will be removed from all transactions prior to 12:00 July 31.

- Select **exact date**, and type a date or select a date from the drop-down calendar. Information for that date will be purged. This option is most useful for testing or implementing the purge feature for a short period of time.

**Important:**

Automatic lost item recovery actions, which take action on the patron account if a lost item is recovered within a set period of time, depend on the availability of patron ID information. If your organization uses automatic lost item recovery actions, be sure to coordinate the settings so that the patron ID is available if the lost item is recovered within the time period you specify. See ["Setting Lost Item Recovery Defaults"](#) on page 248.

5. Click **OK**.

Related Information

Specifying transactions to log - See ["Logging Transactions"](#) in the *Polaris Administration Guide 4.1R2*.

Setting Up E-Commerce



Polaris provides both integrated and e-commerce gateway solutions for credit card processing in the staff client, PAC, and Polaris ExpressCheck.

See the following topics:

- [“E-Commerce with PayPal® Payflow Pro®”](#) on page 86
- [“E-Commerce with PayPal Payflow Link”](#) on page 104
- [“E-Commerce with Payments Gateway Secure Web Pay”](#) on page 119
- [“E-Commerce with Comprise™ SmartPAY™”](#) on page 137
- [“Using Class Point of Sale with Polaris”](#) on page 156

E-Commerce with PayPal® Payflow Pro®

Polaris supports integrated credit card payment processing using the credit card processing service PayPal® Payflow Pro®. You can accept credit card payments from the staff client, Polaris PowerPAC and Mobile PAC, and Polaris ExpressCheck for charges on the patron account and donations to the library (PAC only). A separate license is required for each application. You can set up credit card processing at the system, library, or branch level; you can make separate settings for the staff client, PAC, and Polaris ExpressCheck.

Note:

The e-commerce gateway Comprise™ SmartPAY™ also offers credit card processing for the staff client, PowerPAC, Mobile PAC, and Polaris ExpressCheck. Because this gateway solution handles authorization, the third party is responsible for PCI compliance. See ["E-Commerce with Comprise™ SmartPAY™"](#) on page 137. Additional gateway e-commerce solutions are available for PAC payments only. See the following topics:

- ["E-Commerce with PayPal Payflow Link"](#) on page 104
- ["E-Commerce with Payments Gateway Secure Web Pay"](#) on page 119
- If your library participates in an Active Payment Manager (Class Point of Sale) network, you can set up PAC credit card payments through Class Point of Sale. See ["Using Class Point of Sale with Polaris"](#) on page 156.

To accept credit card payments with PayPal, your library establishes an account with PayPal directly, or with an e-commerce provider such as a bank that offers PayPal Payflow Pro payment processing. For more information about preparing for e-commerce, including compliance with PCI Security Council industry standards, see the following documents on PolarisTown (<http://www.polaristown.com>):

- *E-Commerce for Polaris Libraries* - Answers questions you may have as you prepare for e-commerce.
- *Polaris E-Commerce Data Security Standard Implementation Guide* - Outlines secure data storage, network structure, and best practices for protecting cardholder data and meeting PCI-DSS standards.
- *PCI PA-DSS "Attestation of Validation"* - Records PCI compliance certification for Polaris software, which Polaris customers can use to prove compliance for their payment application software as they proceed with their own PCI compliance process.

To set up Polaris for PayPal Payflow Pro credit card processing, you will need the following information regarding the library's Payflow Pro account:

- Vendor (library) name, user name and password
- Partner code (PayPal or your e-commerce provider)
- PayPal's server name

PayPal Payflow Pro processing works with Polaris in these ways:

- **Staff client** - The staff member selects **Credit Card** as the payment method in those workflows that involve accepting payments from patrons. The staff member enters the credit card information manually or if the workstation is equipped with a credit card reader, the staff member “swipes” the card. A credit card transaction summary is printed on the fine receipt. If a staff workstation will use a credit card reader, you must select the credit card reader option when you install the Polaris staff client application on the workstation. For more information, see the *Polaris Installation Guide*.

Note:

Staff members need the system-level Circulation permissions **Fines: Allow credit card payments** and **Fines: Allow refunds** to accept credit card payments and issue refunds on credit card accounts.

- **PAC** - When PayPal credit card processing is activated in the PAC, a logged-in patron can pay fines from the Fines and Fees page of the patron account. The patron selects the charges to pay and clicks a **Pay fines** link to display the payment form. When the transaction is complete, the patron can receive an e-mail receipt that lists the charges paid. In the staff client (Patron Status workform - Account view), a transaction note indicates that payment was made through the PAC. You can also allow anyone to make a donation (minimum \$1.00) by credit card. Users do not have to log in to make a donation. You can specify separate flat processing fees for fine and donation payments. Separate settings control Polaris PowerPAC and Mobile PAC, but the available features are the same.

Note:

Credit card payments for fines and fees are allowed from PAC if both the following conditions are true:

- The patron's registered branch allows credit card payments.
- The PAC connection organization allows credit card payments.

- **Polaris ExpressCheck** - You can accept credit card payments for fines and fees. The Polaris ExpressCheck workstation must be equipped with a credit card reader, and you must select the credit card reader option when you install the Polaris ExpressCheck application on the workstation. A logged-in patron can pay fines from the Fines and Fees page of the patron account. The patron selects some or all charges to pay and selects **Pay fines now** to display the payment form, then “swipes” the credit card. Also, if a patron owes more than the organization's Money Owed block amount, a Money Owed dialog box is displayed after the patron's barcode has been initially read and the patron has selected a language. In this case, the patron can select **Pay Now** to pay all the charges on the account. In either case, when the transaction is complete, the patron can receive an e-mail receipt that lists the charges paid if there is an e-mail address in the patron record. In the staff client (Patron Status workform - Account view), a transaction note indicates that payment was made through Polaris ExpressCheck.

Note:

Credit card payments for fines and fees are allowed from Polaris ExpressCheck if both the following conditions are true:

- The patron's registered branch allows credit card payments.
- The ExpressCheck workstation's branch allows credit card payments.

See the following topics:

- [“Excluding In-House Workstations from Web-Based Payments”](#) on page 88
- [“Credit Card Payment Manager”](#) on page 88
- [“Credit Card Reports”](#) on page 89
- [“Credit Card Error Logs”](#) on page 89
- [“Set up PayPal Payflow Pro credit card payments”](#) on page 90
- [“Test Values for Payflow Pro Processing”](#) on page 102

Excluding In-House Workstations from Web-Based Payments

To prevent web-based PAC credit card payments from within the library, set the system-level Credit Card Payments parameter **Exclude local workstations from web based payments** to **Yes**. This setting supports a lower level of PCI compliance on the library’s part by preventing payments through PayPal’s Payflow Pro, or hosted gateway solutions such as Payflow Link or Payments Gateway, from within the library network. “Local workstations” are those defined in the In-House IP Addresses database table. Add the library’s wi-fi connection to the table if you also want to exclude payments from mobile devices within the library.

When you exclude local workstations from web-based payments, the **Pay** option is suppressed from the patron account Fines & Fees page, and the **Donation** link displays a message.

For more information about the In-House IP Address table, see [“Identifying In-House Computers”](#) in the *Polaris Administration Guide 4.1R2*.

Credit Card Payment Manager

Staff members can view transaction details and refund payments made with a credit card using the Credit Card Payment Manager, available from the Utilities menu on the Polaris Shortcut Bar. The system Circulation permission, **Access Credit Card Payments Manager: Allow**, is required to access the Credit Card Payment Manager.

The Credit Card Payment Manager shows only those orders and transactions where the staff client workstation’s log-on branch and the transacting branch use the same payment gateway (Payflow Pro or Comprise SmartPAY).

For more information about using the Credit Card Payment Manager, see [“Managing Credit Card Orders”](#) in the *Polaris Patron Services Guide 4.1R2*.

Credit Card Reports

These reports help you track Payflow Pro credit card payments to the library. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Patron Financial** in the Polaris Reports dialog box.

Note:

For information on generating reports, see ["Using Polaris Standard Reports"](#) in the *Polaris Basics Guide 4.1R2*.

- **Donations - Credit Card Payments** - Lists donation payments, including details such as the amount, the purpose, whether the donor wants a printed acknowledgement and, if so, the donor's address; includes credits and voided transactions. You can filter this report by a date range and by organization. The report includes subtotals by organization. The organization is the branch the donor has designated to receive the gift. Use this report to distribute donations to the appropriate organizations. Run the report at the system level to view voided transactions.

Note:

Printed acknowledgements are not automatically generated. Using the information on the report, you can create and send your own acknowledgements.

- **Fines and Fees - Credit Card Payments** - Lists payments for charges, including details such as each patron's total payment credit transaction ID, as well as individual charges and processing fees, the items associated with charges, and the patron barcode. Declined transactions, credits, and voided transactions are also listed. You can filter this report by a date range and by organization. The report includes subtotals by organization. The organization is the organization associated with individual charges on the patron's account.

Credit Card Error Logs

Credit card log files track errors, warnings, and information about credit card transactions made with Payflow Pro. These are located in the following folders:

Staff client transactions -

C:\ProgramData\Polaris\[version]\Logs\Polaris_Errors_[machine]_[date].log

Polaris PowerPAC transactions -

C:\ProgramData\Polaris\[version]\Logs\POWERPAC\
PowerPAC_Errors_[machine]_[date].log

Mobile PAC transactions -

C:\ProgramData\Polaris\[version]\Logs\MOBILEPAC\
MobilePAC_Errors_[machine]_[date].log

Polaris ExpressCheck transactions -

C:\ProgramData\Polaris\[version]\Logs\ExpressCheck_Errors_[machine]_[date].log

If you set up automatic e-mail for errors that require staff intervention (see “Set up PayPal Payflow Pro credit card payments” on page 90), note that these are also included in the log files. Check the log files regularly to be sure that credit card processing is working properly.

Note:

The e-mail receipts sent to patrons for fine and Polaris Fusion payments also include a message if an error occurred that requires the patron to contact the library. Four language strings support this feature:

PACML_PAYMENT_EMAIL_FINESRECEIPT_1063

PACML_PAYMENT_EMAIL_FINESRECEIPT_1064

PACML_PAYMENT_EMAIL_FUSIONRECEIPT_CONTACT

PACML_PAYMENT_EMAIL_FUSIONRECEIPT_SUCCESS

You can view and edit the text in these language strings with Polaris WebAdmin (Language Editor). See the WebAdmin help file for more information.

1-2-3

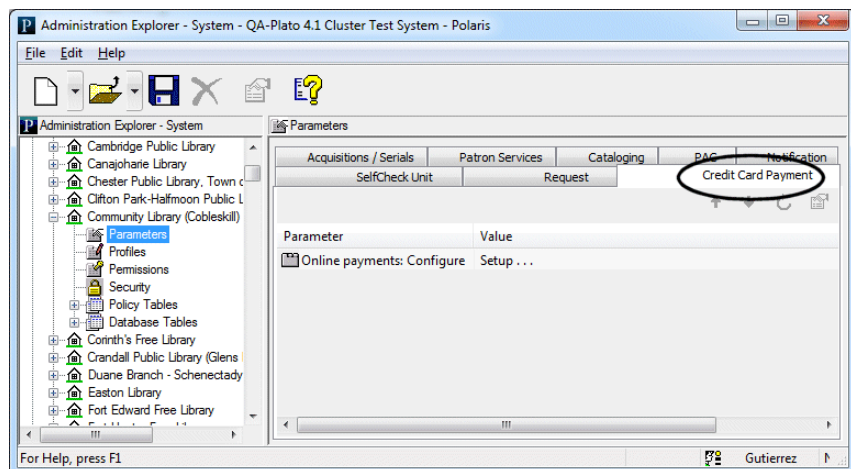
Set up PayPal Payflow Pro credit card payments

Follow these steps to set up credit card payment processing with the PayPal Payflow Pro service.

Note:

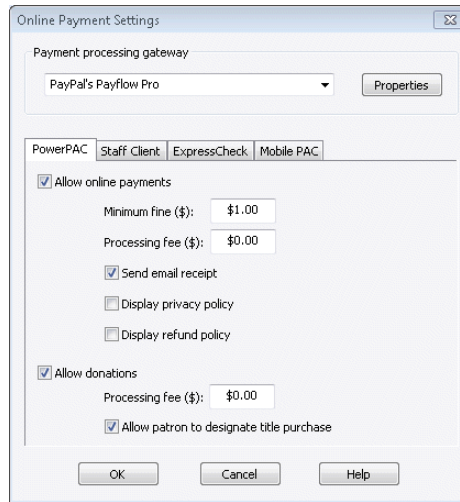
You can set up credit card processing at the system, library, or branch level for payments in the staff client and PAC.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Credit Card Payment** tab in the details view.



2. Double-click **Online Payments: Configure**.

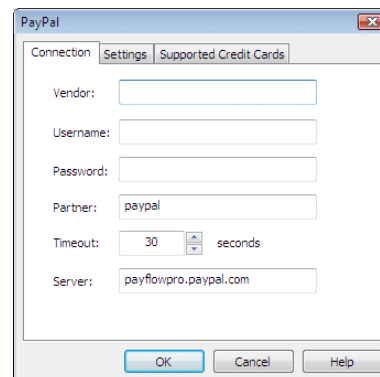
The Online Payments Settings dialog box appears.



3. Select **PayPal's Payflow Pro** in the **Payment processing gateway** list.

4. Click **Properties**.

The PayPal Properties dialog box opens to the Connection tabbed page.



5. Enter the following settings on the Connection tabbed page:

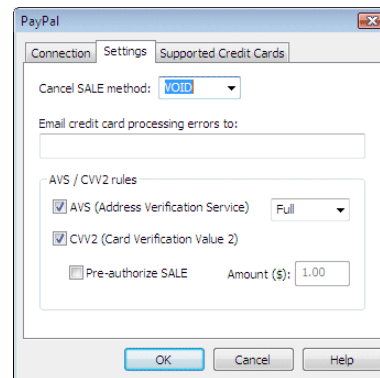
- **Vendor** - Your library's main account name. Obtain this setting from PayPal or your e-commerce partner.
- **Username** and **Password** - Obtain these settings from PayPal or your e-commerce partner. Once you have a username and password, you can set up others for the same account if you need to track manual transactions.
- **Partner** - Enter your partner's code here (**PayPal** or your e-commerce provider).
- **Timeout** - Set the number of seconds that should elapse with no action before the payment connection times out. The default is 30 seconds.

- **Server** - Type **payflowpro.paypal.com** for live transactions, or **pilot-payflowpro.paypal.com** for testing purposes. See [“Test Values for Payflow Pro Processing”](#) on page 102 for credit card values you can use for testing.

Note:

The **payflowpro.paypal.com** setting is typical, but may be different depending your bank.

6. Click the **Settings** tab, and enter the following information on the Settings tabbed page:



- **Cancel SALE method** - This setting determines the appropriate automatic action (**VOID** or **CREDIT**) to cancel a SALE transaction. A sale may be canceled when it has been approved but fails AVS (Address Verification) and/or CVV2 (Card Verification Value 2) verification, or when a Polaris database error occurs. If a processor batch-processes sales transactions at the end of the day, a VOID transaction may be used to prevent the canceled SALE from settling. The library is charged only one transaction fee. However, some processors are host-based and do not use the batch method; in this case, all SALE transactions are settled immediately and a CREDIT transaction must be used to cancel the SALE. For these processors, the library is charged two transaction fees (one for the SALE and one for the CREDIT).

Important:

You must contact your processor or PayPal e-commerce account provider to determine if the processor uses the batch method or if they are host-based. If the processor uses the batch method, you must also verify that SALE transactions can be voided. If so, you can select VOID for the Cancel SALE method and avoid paying two transaction fees. Most processors use the batch method. However, if the processor uses the host method, you must select CREDIT as the cancel sale method, and you will be charged two transaction fees when a sale is canceled. (Examples of host-based processors include PayPal and Global Payments Central.)

Tip:

Log files record errors, warnings, and information about credit card transactions. See [“Credit Card Error Logs”](#) on page 89.

- **E-Mail credit card processing errors to** - This option is highly recommended. Specify a staff e-mail address to receive automatic e-mail messages when a credit card transaction fails and staff intervention is required. The message includes details about the

failure, so the staff member can then take action on the failed transaction, either contacting the patron or adjusting the Polaris patron record manually.

Example:

A patron's credit card is charged, but due to some type of error or processing rule, the transaction needs to be canceled or a partial credit needs to be applied. (This could be due to AVS or CVV2 failures or a database update error.) If the cancel or credit transaction fails, the patron credit card account is charged, but the transaction is not reflected in the Polaris patron record. A staff member needs to adjust the patron account.

- **AVS** - Address verification, a security measure that may be provided as part of your contract with your e-commerce partner. AVS matches the street address and Zip code on the Polaris payment form with the street address and Zip code in a credit card database that PayPal accesses. Select (check) this option to use AVS. Then select a level of verification. For the following options, Y indicates the value matches, N indicates the value does not match, and X indicates that the cardholder's bank does not support the check:

—**Full** indicates that the street address must be Y and the Zip code must be Y (YY) or the transaction is declined. There can be no N values and no X values. Earlier versions of Polaris automatically used this level.

—**Medium** indicates that there can be no N values (YY, XY, YX, XX allowed).

—**Light** declines transactions only when both values equal N. All other combinations are accepted.

Note:

Occasionally AVS is faulty and a billing address, though correct, fails to be matched. In this case the user receives a message and the transaction is voided. If you find this is a problem, you may want to set the checking level to **Light** or clear (uncheck) the AVS option.

Also note that the billing address that is displayed when the payment form opens is taken from the address information in the Polaris patron record, and may be different from the patron's credit card billing address. The billing address can be changed on the payment form. Once it is changed, it is not checked against the patron's record again during the transaction.

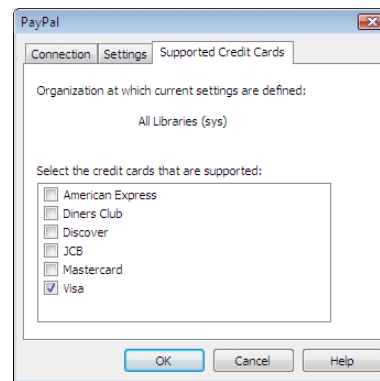
- **CVV2** - Card Validation Value 2, a security measure that may be provided as part of your PayPal contract with your e-commerce partner. This option requires the user to enter a code usually located on the back of the credit card. Select (check) this option to use CVV2.
- **Pre-authorize SALE** - Available only when you select AVS and/or CVV2 verification. Select this option to AUTHORIZE a transaction before submitting the SALE transaction. An AUTHORIZE transaction returns an approval/decline without actually charging the cardholder's account for the full "sale." Set the amount to a small dollar amount such as \$1 (the default) to process the AVS and CVV2 information. If AVS or CVV2 fails, the cardholder is warned, and the actual charge is not placed on the credit card account. This eliminates the need for VOID/CREDIT processing of

a SALE based on failed AVS or CVV2. If the AUTHORIZE transaction is approved and AVS/CVV2 passes all tests, then a SALE transaction is issued for the full amount. If a SALE is declined for the full amount, the new VOID or CREDIT option would be used to cancel the SALE transaction.

Note:

An AUTHORIZE transaction will still place a small hold (for example, \$1) on the credit cardholder's funds. Depending on the cardholder's bank, the hold may remain for 24 hours to a week. While this style of processing credit card payments can help reduce SALE issues based on AVS and CVV2 processing, it requires an additional transaction fee for every credit card payment.

7. Click the **Supported Credit Cards** tab.



8. Select (check) the types of credit cards your provider supports, and click **OK**.

The PayPal properties dialog box closes.

Note:

You can set the credit card types at the system, library, or branch level. The Supported Credit Cards tabbed page indicates the organization from which the settings have been inherited. If you make a change at the branch level, the branch name is displayed on the tabbed page. To revert to the settings of a higher level organization, clear all the check boxes and click **OK**. Then open the tabbed page again. The settings of the higher level organization are displayed, and the name of the organization is displayed on the tabbed page.

9. To set up credit card payments from Polaris PowerPAC, follow these steps:

Important:

To accept PowerPAC online payments, you must enable secure socket layer (SSL) in Polaris Administration. Set the **SSL: Enable PowerPAC** parameter for the Web server to **Yes**. See ["Setting Web Server Parameters"](#) in the *Polaris Administration Guide 4.1R2*. Patrons must have SSL protocol enabled for their Web browsers and must accept the certificate the first time they log on from outside the library.

- a) Click the **PowerPAC** tab on the Online Payments Settings dialog box, if it is not already selected.

- b)** Select (check) **Allow online payments**. The payment options become available.

Note:

Credit card payments for fines and fees are allowed from PAC if both the patron's registered branch and the PAC connection organization allow credit card payments.

Tip:

You can use this setting to prevent payments so small that they are offset by your e-commerce provider's transaction fees.

- c)** Set the minimum fine amount you want to accept by credit card payment.

The default value is the lowest possible value, \$0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in the PAC.

- d)** To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
- e)** If you want patrons to receive an automatic payment receipt, select (check) **Send email receipt**.

The e-mail receipt lists each fine covered by the transaction. The patron can specify an e-mail address on the payment form. The sender's address is that specified in the PAC profile **Email notification: Email address of sender**.

Note:

The link for paying fines is on the Fines and Fees page of the patron account. Be sure the PowerPAC profile **Navigation: Fines & fees** is set to **Yes** for the organization. See ["Enable patron account access - PowerPAC"](#) in the *Polaris Public Access Administration Guide 4.1R2*.

- f)** To display a privacy policy link on the processing fee, payment, and payment verification pages in Polaris PowerPAC, select (check) **Display privacy policy**.

When this option is checked, your privacy policy message is displayed when the patron clicks the privacy policy link. You specify your privacy policy text using Polaris WebAdmin (Language Editor). The message ID is **PACML_PAYMENT_PRIVACYPOLICY_1066**. The system uses the text specified for the patron's registered branch. For information about editing PAC language files, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

- g)** To display a refund policy link on the processing fee, payment, and payment verification pages in Polaris PowerPAC, select (check) **Display refund policy**.

When this option is checked, your refund policy message is displayed when the patron clicks the refund policy link. You specify your refund policy text using Polaris WebAdmin (Language Editor). The message ID is **PACML_PAYMENT_REFUNDPOLICY_1067**. The system uses the text specified for the patron's registered branch. For information about editing PAC language files, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

- h)** To accept credit card payments for donations, select (check) **Allow donations**.

In general, the list of “receiving” organizations in PAC is limited to those with credit card processing enabled. When a donation is made, the receiving organization’s credit card settings are applied. If the connection organization is a branch, and that branch has enabled credit card processing and donations, donations can only be made to that branch. However, if the PAC connection organization is the system and the system organization does not have donations enabled, the system checks to see if any library or branch organizations accept donations. If so, a donation can be made, and the list of receiving organizations includes those that accept donations. (The system organization does not appear in the list.) Thus systems that do not allow branch switching in PAC can still accept branch-level donations.

Important:

The donation Web part appears in the PAC dashboard when you assign it to the page. Be sure to assign the donation Web part to the pages where you want it to appear. See [“Assign Web parts to public pages”](#) in the *Polaris Public Access Administration Guide 4.1R2*.

- i)** To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is \$20.00.
- j)** To allow donors to direct a donation toward a title purchase in a specific subject area, select (check) **Allow patron to designate title purchase**.

This option places an appropriate control on the donations page, where the donor can specify a title purchase.

- 10.** To set up credit card payments from the staff client, follow these steps:

- a)** Click the **Staff Client** tab on the Online Payments Settings dialog box.

The Staff Client tabbed page is displayed.

The screenshot shows the 'Online Payment Settings' dialog box with the 'Staff Client' tab selected. The 'Payment processing gateway' is set to 'PayPal's Payflow Pro'. The 'Allow online payments' checkbox is checked. The 'Minimum fine (\$)' is set to '\$3.00' and the 'Processing fee (\$)' is set to '\$0.00'. The 'Send email receipt' and 'Allow manual credit card data entry if card reader is attached' checkboxes are also checked. The dialog box has 'OK', 'Cancel', and 'Help' buttons at the bottom.

- b) Select (check) **Allow online payments**.

The payment options become available.

- c) Set the minimum fine amount you want to accept by credit card payment.
- d) To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
- e) To provide an automatic e-mail payment receipt to patrons, select (check) **Send email receipt**.

The e-mail receipt is sent to the e-mail address in the patron record. If the patron record does not include an e-mail address, no e-mail receipt is sent. The staff member cannot specify an e-mail address during the payment process.

- f) If staff workstations have credit card readers but you also want to allow manual data entry, select (check) **Allow manual credit card data entry if card reader is attached**.

Note:

If a staff workstation will use a credit card reader, you must select the credit card reader option when you install the Polaris staff client application on the workstation. See the *Polaris Installation Guide* for more information.

11. To set up credit card payments from Polaris ExpressCheck, follow these steps:

Note:

To accept credit card payments, the Polaris ExpressCheck workstation must be equipped with a credit card reader, and you must select the credit card reader option when you install the Polaris ExpressCheck application on the workstation. See the *Polaris ExpressCheck Administration Guide* for more information.

- a) Click the **ExpressCheck** tab on the Online Payments Settings dialog box.

The ExpressCheck tabbed page is displayed.

The screenshot shows the 'Online Payment Settings' dialog box with the 'ExpressCheck' tab selected. The 'Payment processing gateway' is set to 'PayPal's Payflow Pro'. The 'ExpressCheck' tab is active, showing options for online payments. The 'Allow online payments' checkbox is checked. The 'Minimum fine (\$)' is set to '\$3.00' and the 'Processing fee (\$)' is set to '\$0.00'. The 'Send email receipt' checkbox is checked, while 'Display privacy policy' and 'Display refund policy' are unchecked. The dialog has 'OK', 'Cancel', and 'Help' buttons at the bottom.

- b)** Select (check) **Allow online payments**. The payment options become available.

Note:

Credit card payments for fines and fees are allowed from Polaris ExpressCheck if both the patron's registered branch and the ExpressCheck workstation's branch allow credit card payments.

- c)** Set the minimum fine amount you want to accept by credit card payment.
- d)** To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
- e)** To provide an automatic e-mail payment receipt to patrons, select (check) **Send email receipt**.

The e-mail receipt is sent to the e-mail address in the patron record. If the patron record does not include an e-mail address, no e-mail receipt is sent. The patron cannot specify an e-mail address during the payment process.

- f)** To display a privacy policy link on the processing fee, payment, and payment verification pages in Polaris ExpressCheck, select (check) **Display privacy policy**.

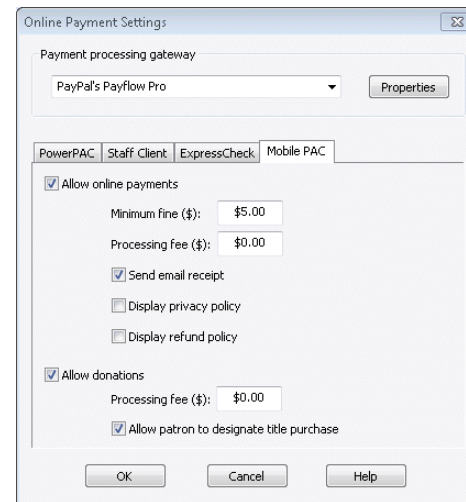
When this option is checked, your privacy policy message is displayed when the patron selects the privacy policy link. You specify your privacy policy text using Polaris WebAdmin (Language Editor). The message ID is **EC_TEXT_POLICY_PRIVACY**. For information about editing ExpressCheck language files, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online help.

- g)** To display a refund policy link on the processing fee, payment, and payment verification pages in Polaris ExpressCheck, select (check) **Display refund policy**.

When this option is checked, your refund policy message is displayed when the patron selects the refund policy link. You specify your refund policy text using Polaris WebAdmin (Language Editor). The message ID is **EC_TEXT_POLICY_REFUND**. For information about editing ExpressCheck language files, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online help.

12. To set up credit card payments from Mobile PAC, follow these steps:**Important:**

To accept Mobile PAC online payments, you must enable secure socket layer (SSL) in Polaris Administration. Set the **SSL: Enable Mobile PAC** parameter for the Web server to **Yes**. See [“Setting Web Server Parameters”](#) in the *Polaris Administration Guide 4.1R2*. Patrons must have SSL protocol enabled for their mobile device Web browsers.

a) Click the **Mobile PAC** tab on the Online Payments Settings dialog box.**b)** Select (check) **Allow online payments**. The payment options become available.**Note:**

Credit card payments for fines and fees are allowed from Mobile PAC if both the patron's registered branch and the Mobile PAC connection organization allow credit card payments.

Tip:

You can use this setting to prevent payments so small that they are offset by your e-commerce provider's transaction fees.

c) Set the minimum fine amount you want to accept by credit card payment.

The default value is the lowest possible value, \$0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in Mobile PAC.

d) To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.**e)** If you want patrons to receive an automatic payment receipt, select (check) **Send email receipt**. For fine receipts, the system uses the setting of the patron's branch. For donations (see step h below), the system uses the setting of the donation's receiving branch.

The e-mail receipt lists each fine covered by the transaction. The patron can specify an e-mail address on the payment form. The sender's address is that specified in the PAC profile **Email notification: Email address of sender**.

Note:

The link for paying fines is on the Fines and Fees page of the patron account. Be sure the Mobile PAC profile **Navigation: Fines & fees** is set to **Yes** for the organization. See ["Patron Account \(My Account\) in Mobile PAC"](#) in the *Polaris Public Access Administration Guide 4.1R2*.

- f)** To display a privacy policy link on the processing fee, payment, and payment verification pages in Mobile PAC, select (check) **Display privacy policy**.

When this option is checked, your privacy policy message is displayed when the patron clicks the privacy policy link. You specify your privacy policy text using Polaris WebAdmin (Language Editor). The message ID is **MP_CRUMBS_FINESANDFEES_PRIVACY**. The system uses the text specified for the patron's registered branch. For information about editing PAC language strings, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

- g)** To display a refund policy link on the processing fee, payment, and payment verification pages in Polaris Mobile PAC, select (check) **Display refund policy**.

When this option is checked, your refund policy message is displayed when the patron clicks the refund policy link. You specify your refund policy text using Polaris WebAdmin (Language Editor). The message ID is **MP_CRUMBS_FINESANDFEES_REFUND_POLICY**. The system uses the text specified for the patron's registered branch. For information about editing PAC language strings, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

- h)** To accept credit card payments for donations, select (check) **Allow donations**.

In general, the list of "receiving" organizations in PAC is limited to those with credit card processing enabled. When a donation is made, the receiving organization's credit card settings are applied. If the connection organization is a branch, and that branch has enabled credit card processing and donations, donations can only be made to that branch. However, if the PAC connection organization is the system and the system organization does not have donations enabled, the system checks to see if any library or branch organizations accept donations. If so, a donation can be made, and the list of receiving organizations includes those that accept donations. (The system organization does not appear in the list.) Thus systems that do not allow branch switching in PAC can still accept branch-level donations.

Important:

To display the donation link in Mobile PAC, set the Mobile PAC profile **Navigation: Donations** to **Yes**.

- i)** To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is \$20.00.

- j) To allow donors to direct a donation toward a title purchase in a specific subject area, select (check) **Allow patron to designate title purchase**.

This option places an appropriate control on the donations page, where the donor can specify a title purchase.

13. Click **OK** to save your settings.

Related Information

- **Accepting credit card payments in the staff client** - See [“Taking Credit Card Payments”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Donation branch order in PAC** - In the PAC, the patron chooses a branch from a list when making a donation. The branch display order is controlled in PAC Administration. See [“Setting Up Polaris PowerPAC”](#) in the *Polaris Public Access Administration Guide 4.1R2*.
- **Suppressing a branch from the donation branch list** - Use the system-level PAC profile **Suppress branches** to prevent a branch from appearing in the list. For Polaris PowerPAC, this profile also suppresses the selected branches from the connection branch list (**Switch to another branch**), the list of branches on the Search Options scoping page, and the list of branches on the Advanced Search scoping page. For Mobile PAC, the profile suppresses the branch from the drop-down lists on the Library Hours and Preferences pages.

Test Values for Payflow Pro Processing

Use the values in the following tables to test Payflow Pro credit card transactions.

Credit Card Numbers

Use the following credit card numbers for testing. Any other card number produces a general failure.

<i>Credit Card Type</i>	<i>Account Number</i>
American Express	378282246310005
American Express	371449635398431
Amex Corporate	378734493671000
Australian BankCard	5610591081018250
Diners Club	30569309025904
Diners Club	38520000023237
Discover	6011111111111117
Discover	6011000990139424
JCB	3530111333300000
JCB	3566002020360505
MasterCard	5555555555554444
MasterCard	5105105105105100
Visa	4111111111111111
Visa	4012888888881881
Visa	422222222222

Result Codes Resulting From Amount Submitted

<i>Amount</i>	<i>Result (RESPMSG)</i>
\$0 - \$1000	0 (Approved)
\$1001 - \$2000	Certain amounts in this range return specific result codes. These can be generated by adding \$1,000 to that result code. For example, for result 13 (Referral), submit the amount \$1013. If the amount is in this range but does not correspond to a result code supported by this testing mechanism, result 12 (Declined) is returned.
\$2001+	12 (Declined)

Testing AVS - Address (AVSADDR)

<i>Submitted Value for STREET</i>	<i>Example STREET Value</i>	<i>AVSADDR Result</i>
000-333	24285 Elm	Y
334-666	49354 Main	N
667 or higher or begins with a non-numeric character	79232 Maple	X

Testing AVS - Zip (AVSZIP)

<i>Submitted Value for ZIP</i>	<i>Example ZIP Value</i>	<i>AVSZIP Result</i>
00000-50000	00382	Y
5001-99999	94303	N
Any value (if street address is 667 or higher or begins with a non-numeric character)	STREET=79232 Maple, ZIP=20304	X

Testing CVV2MATCH

<i>CVV2 Value</i>	<i>CVV2MATCH Value</i>
000-300	Y
301-600	N
601 or higher	X

E-Commerce with PayPal Payflow Link

Polaris supports PayPal's Payflow Link payment gateway for credit card payments from Polaris PowerPAC and Mobile PAC. The Payflow Link gateway is a hosted "redirect and postback" method of providing credit card payments from Polaris PAC applications. An advantage of this method is that much of the responsibility of PCI compliance falls to the gateway, which handles authorization requirements, rather than the library. No credit card information is stored in the Polaris database when payment is made through the Payflow Link hosted payments site. For more information about the Payflow Link gateway, see

https://merchant.paypal.com/cgi-bin/marketingweb?cmd=_render-content&content_ID=merchant/payment_gateway

The logged-on PAC user selects the charges to pay and clicks **Pay Fines Now**. When the user clicks **Pay Fines Now**, the Payflow Link hosted checkout page opens. After the credit card payment transaction has been set up and finalized, the user clicks a link to return to the Fines & Fees page in the Polaris patron account. Payflow Link sends an e-mail receipt for the payment to the user's e-mail address specified on the Hosted Checkout page. Similar processing is available for donations.

The Polaris e-commerce licenses for Polaris PowerPAC and Mobile PAC (if your system includes Mobile PAC) are required to use this feature. For fine payments, both the PAC connection branch and the patron's registered branch must support credit card processing. The patron's registered branch settings determine the specific credit card processor and parameters. For donations, the selected recipient branch's settings determine the specific credit card processor and parameters.

Payments from the staff client or from Polaris ExpressCheck are not supported.

Note:

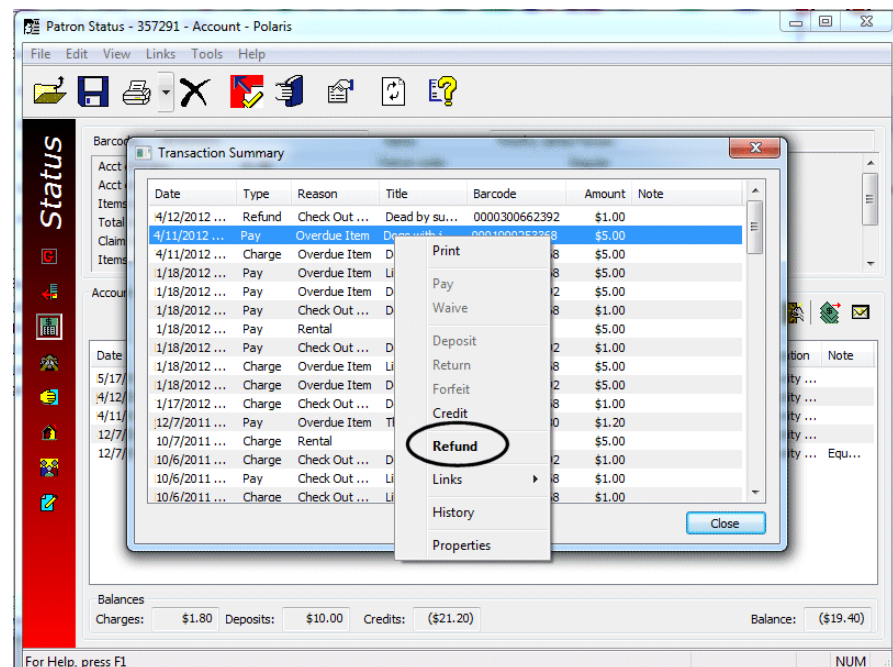
When the payment processing gateway for the staff client log-in branch is Payflow Link, the Credit Card Payments Manager is not available from the **Utilities** menu. At branches where the Credit Card Payments Manager is accessible, store orders and store transactions do not appear for Payflow Link transactions.

See the following topics:

- [“Refunds”](#) on page 106
- [“Excluding In-House Workstations from Web-Based Payments”](#) on page 108
- [“Polaris Standard Reports for Payflow Link”](#) on page 108
- [“Payflow Link Reports”](#) on page 108
- [“Set up the PayPal Payflow Link gateway account”](#) on page 110
- [“Set up Payflow Link processing in Polaris Administration”](#) on page 113

Refunds

With the Payflow Link hosted gateway solution, refund transactions are not integrated in Polaris. Credit card refunds must be handled separately, both through Payflow Link and manually from the Polaris patron account in the Polaris staff client. For example, if a replacement charge has been paid via credit card, the refund must be issued manually from the Polaris patron account transaction summary and then again from Payflow Link. Work with Payflow Link to establish the appropriate staff accounts for handling refunds, then establish the refunds workflow with your staff. Do not allow staff to issue refunds to credit card payments from the Polaris patron account as cash or credit; instead, they must select **Refund**.

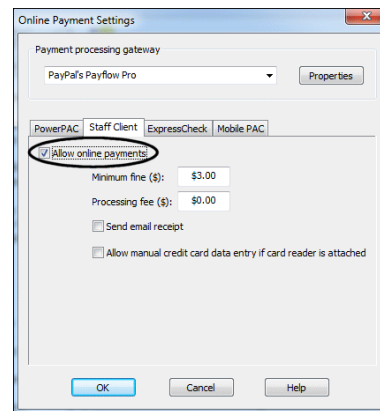


Note:

If a patron successfully pays by credit card using the Payflow Link web page and the transaction is voided because Polaris was unable to update the database, then no record of a payment is made in Polaris and the patron's credit card payment will be voided by Payflow Link. If a staff member attempts to manually void a transaction using the PayPal manager, the void transaction is not reflected in Polaris.

Polaris also supports integrated (non-hosted) credit card processing, such as PayPal's Payflow Pro (see "[E-Commerce with PayPal® Payflow Pro®](#)" on page 86), which does offer credit card refunds from within Polaris. In systems where some sites use an integrated solution and others use a hosted gateway solution such as Payflow Link, refunds can only be made in these circumstances:

- The staff client log-on branch supports integrated payments and the **Online Payments: Configure** option in Polaris Administration (Credit Card parameters) is set to allow payments from the staff client for the integrated solution.



- The original payment was made using the integrated solution and the **Online Payments: Configure** option is set to allow payments from the staff client for the integrated solution.

Otherwise, when an attempt is made to refund a credit card payment in Polaris, a message displays indicating that no refund transaction can be created. The credit card is not refunded and the patron account is left as is. This situation might occur if a consortium has implemented both integrated and hosted credit card payment solutions, or a library or consortium has changed from one solution to another and the refund is attempted after the change.

Lost Item Recovery

If a lost-and-paid item is recovered at check-in and the payment was made via credit card, and the library has set the lost-and-paid item recovery options to automatically credit the patron's account, a "dummy" refund is created instead of a credit. The refund will appear as a refund in the Polaris patron account and a refund transaction created. This transaction is available for reporting in the Refunds to Credit Card Payments report (see ["Polaris Standard Reports for Payflow Link"](#) on page 108). You can use the report to cross-check transactions logged in Payflow Link. (Note that the refund must also be made from Payflow Link.)

Instead of automatically crediting the patron's account, you may want to set the lost-and-paid item recovery options to **Leave as is**. With this setting, the payments remain in the Polaris patron account and the refund or credit can be done from Payflow Link. Or your library may choose to disable all automatic recovery actions, requiring staff to create manual refunds when a lost-and-paid item is recovered. For more information about setting lost item recovery options, see ["Setting Lost Item Recovery Defaults"](#) on page 248.

Excluding In-House Workstations from Web-Based Payments

To prevent web-based credit card payments from within the library, set the system-level Credit Card Payments parameter **Exclude local workstations from web based payments** to **Yes**. This setting supports a lower level of PCI compliance on the library's part by preventing payments through Payflow Link from within the library network. "Local workstations" are those defined in the In-House IP Addresses database table. Add the library's wi-fi connection to the table if you also want to exclude payments from mobile devices within the library.

When you exclude local workstations from web-based payments, the **Pay** option is suppressed from the patron account Fines & Fees page, and the **Donation** link displays a message.

For more information about the In-House IP Address table, "[Identifying In-House Computers](#)" in the *Polaris Administration Guide 4.1R2*.

Polaris Standard Reports for Payflow Link

These reports are available from the Polaris staff client **Utilities, Reports and Notices** menu (**Public Services, Patron Financial** folder).

Note:

The Polaris toolbar reports **Fines and Fees - Credit Card Payments** and **Donations - Credit Card Payments** record payments made through Payflow Link, but do not reflect credit or void transactions. For details about these reports, see "[E-Commerce Credit Card Reports](#)" in the *Polaris Basics Guide 4.1R2*.

- **Refunds to Credit Card Payments** - Helps you track refunds to credit card payments that have been made in the Polaris patron account (see "[Refunds](#)" on page 106). You can set a date range and select one, several, or all organizations. Use this report to reconcile refund transactions made in Polaris with transactions in Payflow Link.
- **Hosted Credit Card Payments** - Tracks credit card payments in the patron account made through the hosted gateway. You can set a date range and select one, several, or all organizations, and set a sort order by patron barcode, StoreOrder ID, or transaction date. The organization is the patron's registered branch for fines and fees payments, or the receiving branch for donations.

Note:

If your library accepts credit card payments through Payflow Link for reasons other than patron fines and fees or donations, such as gift shop purchases, those payments do not appear on the Polaris Hosted Credit Card Payments report. However, the transactions are available in Payflow Link reports.

Payflow Link Reports

Payflow Link offers transaction reports; for example:

- **Transaction Summary Report**

Transaction Summary Report

Login Name	Date	Time Zone	Settlement Status	Transaction Mode
PayPalPolarisPayFlow	Wed May 02, 2012 to Wed May 02, 2012	U.S. Pacific	All Transactions	Test

Download: 1. ASCII Text

Go

1-2 of 2 First | Prev | Next | Last

TRANSACTION TYPE	PROCESSOR	TRANSACTION COUNT	RESULT CODE	CARD TYPE	CURRENCY	MINIMUM AMOUNT	MAXIMUM AMOUNT	AVERAGE AMOUNT	TOTAL AMOUNT
Sale	FDMS Nashville	4	0	Visa	USD	8.00	15.00	11.50	46.00
Void	FDMS Nashville	2	0	Visa	USD	8.00	15.00	11.50	23.00

Download: 1. ASCII Text

Go

1-2 of 2 First | Prev | Next | Last

- **Daily Activity Transaction Report** - The transaction IDs match those stored in the ILSStoreTransactions.OrgID Polaris database table. Comment1 is the payment reason and transacting organization; Comment2 is the Polaris store order ID and the patron barcode, if any.

Daily Activity Transaction Report

Login Name	Report Type	Date	Time Zone	Transaction Mode
PayPal/PolarisQA	Full Details	Thu Jun 14, 2012	U.S. Pacific	Test

Download: 1. ASCII Text

Go

1-3 of 3 First | Prev | Next | Last

TRANSACTION ID	TRANSACTION TIME	TRANSACTION TYPE	CARD TYPE	ACCOUNT NUMBER	EXPIRATION DATE	CURRENCY	AMOUNT	RESULT	RESPONSE MESSAGE	COMMENT1	COMMENT2
V24A2ABB83FA	Jun 14, 2012 6:04:51 AM	Sale	Visa	1111	06/15	USD	2.05	0	Approved	Fine-Schenectady County Public Library - Central	702-offline102010
V25A2ABBBA23	Jun 14, 2012 6:13:13 AM	Sale	Visa	1111	05/15	USD	10.50	0	Approved	Donation-Schenectady County Public Library - Central	704-
V34A2ABB1668	Jun 14, 2012 6:08:01 AM	Sale	Visa	1111	06/15	USD	25.50	0	Approved	Donation-Schenectady County Public Library - Central	703-

Download: 1. ASCII Text

Go

1-3 of 3 First | Prev | Next | Last

1-2-3

Set up the PayPal Payflow Link gateway account

Your library can establish a merchant account with Payflow Link directly. Follow these steps to set up the account.

1. Sign up for your Payflow Link gateway account.
2. Log on to PayPal Manager.
3. Go to **Service Settings** and select **Setup**.

Set Up

Choose your settings

Here are your current Hosted Checkout Page settings. You can change them on this page to modify the checkout page.

Transaction Process Mode:

Display options on payment page

Here is how your current Hosted Checkout Page will look.

Enter Text for Cancel URL: (optional)

Enter Cancel URL:

Enter Error URL: [What is this?](#)

Cancel URL Method:

Enter Button Text: [What is this?](#)

PayPal Express Checkout

Add [PayPal Express Checkout](#) to your current hosted checkout page.

How Your Pages Look:

PayPal email address: [What is this?](#)

PayPal Sandbox email address: [What is this?](#)

Billing Information

Choose the fields your customer will be required to complete during checkout. This section does not apply to Layout C except for the CSC field.

Make these fields required: ☒ Name ☒ Address ☒ City/Suburb ☒ State/Province ☒ ZIP code/Postal code ☐ Country ☐ Phone ☐ Email address ☒ CSC

Make these fields editable: ☒ Name ☒ Address ☒ City/Suburb ☒ State/Province ☒ ZIP code/Postal code ☐ Country ☐ Phone ☐ Email address ☒ CSC

Note: Required / Editable Billing Information is not valid for Internet Checks.

Shipping Information

This section does not apply to Layout C.

Make these fields required: ☐ Name ☐ Address ☐ City/Suburb ☐ State/Province ☐ ZIP code/Postal code ☐ Country ☐ Phone ☐ Email address

Make these fields editable: ☐ Name ☐ Address ☐ City/Suburb ☐ State/Province ☐ ZIP code/Postal code ☐ Country ☐ Phone ☐ Email address

Payment Confirmation

Header and footer text do not apply to Layout C.

Show confirmation page ☐ On a PayPal hosted page [Sample](#)

4. Under **Choose your settings**, set Transaction Process Mode to **Live** when you are ready to go live with credit card payments. (For set-up purposes, set this option to **Test**.)

Note:

Settings under **Display options on payment page** are optional.

5. Under **PayPal Express Checkout**, set **Enable PayPal Express Checkout** to **Yes**.

PayPal Express Checkout

Add [PayPal Express Checkout](#) to your current hosted checkout page.

Enable PayPal Express Checkout:

How Your Pages Look:

PayPal email address: [What is this?](#)

PayPal Sandbox email address: [What is this?](#)

6. Under **Billing Information**, specify the required and editable fields for the billing information the user must supply.

7. Under **Payment Confirmation**, **Show confirmation page**, select **On a PayPal hosted page**.
8. Enter text for your return URL.
This text labels the link that returns the patron to the Polaris PowerPAC patron account Fines & Fees page, or the equivalent page in Mobile PAC if a mobile device is detected.
9. In the **Enter Return URL** box, type the URL for the interim page that redirects the user to Polaris PowerPAC or Mobile PAC, if a mobile device is detected:
<https://www.mylibrary.org/polaris/payments/payflowlinkreturn.aspx>, where www.mylibrary.org/polaris is your PAC web site.
10. Set **Return URL Method** to **Link**.

Payment Confirmation

Header and footer text do not apply to Layout C.

Show confirmation page ☒ On a PayPal hosted page [Sample](#)
☐ On my website [Tips](#)

Enter your header text: (optional)

Enter your footer text: (optional)

Enter text for Return URL:

Enter Return URL:

Return URL Method: Choose Link if you are not sure.

11. Under **Silent Post for Data Transfer**, set **Use Silent Post** to **Yes**.
12. In the **Enter Silent Post URL** field, enter the post-back URL for your site:
<https://www.mylibrary.org/polaris/Payments/PostbackPayflowLink.aspx>, where www.mylibrary.org/polaris is your PAC web site.
13. Select (check) **Void transaction when my server fails to receive data sent by the silent post**.

Silent Post for Data Transfer

Use Silent Post:

Enter Silent Post URL:

☒ **Void transaction when my server fails to receive data sent by the silent post.**

Return URL when Silent Post fails:

14. Under **Email Confirmation**, set **Do you want us to confirm payment by email** to **Yes**.

Email Confirmation

Create an email to be sent to your customers.

Do you want us to confirm payment by email? **Yes** ▼

Email "from" merchant address:

Email "to" merchant address:
(optional)

Email copy to merchant address:
(optional)

Enter your header text:
(optional)

Enter your footer text:
(optional)

15. Under Configure Security Options, set Enable Secure Token to Yes.

Security Options

Use these settings to allow or decline transactions based on AVS/CSC responses. If PayPal is your payment processor, be sure the AVS and CSC settings in your PayPal account match your settings here. These settings automatically allow or decline transactions based on AVS and CSC responses. For details, see [Help](#).

AVS: **No** ▼

CSC: **Light** ▼

Enable Secure Token: **Yes** ▼ [What is this?](#)

1-2-3

Set up Payflow Link processing in Polaris Administration

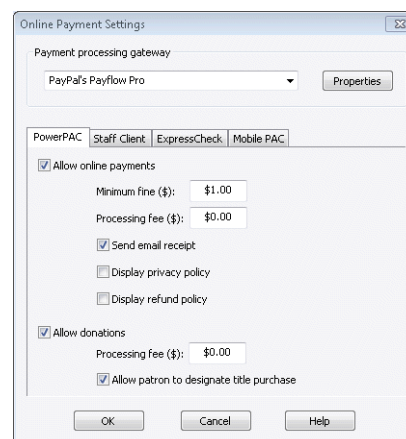
Follow these steps to set up Polaris for Payflow Link credit card processing in Polaris Administration.

Important:

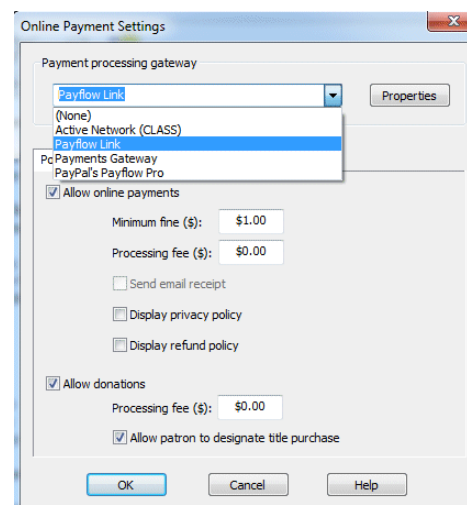
To accept PowerPAC online payments, you must enable secure socket layer (SSL) in Polaris Administration. Set the **SSL: Enable PowerPAC** parameter for the Web server to **Yes**. For Mobile PAC, set the **SSL: Enable Mobile PAC** parameter for the Web server to **Yes**. See ["Setting Web Server Parameters"](#) in the *Polaris Administration Guide 4.1R2*. Patrons must have SSL protocol enabled for their Web browsers and must accept the certificate the first time they log on from outside the library.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Credit Card Payment** tab in the details view.
2. Double-click **Online Payments: Configure**.

The Online Payments Settings dialog box opens.

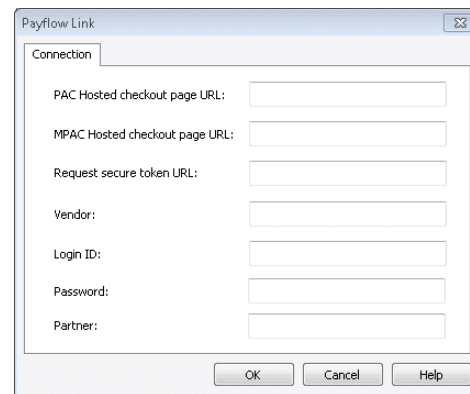


3. Select **Payflow Link** in the **Payment processing gateway** list.



4. Click Properties.

The Payflow Link Properties dialog box opens.

The image shows a screenshot of the 'Payflow Link' dialog box with the 'Connection' tab selected. The dialog box contains several text input fields for configuration: 'PAC Hosted checkout page URL:', 'MPAC Hosted checkout page URL:', 'Request secure token URL:', 'Vendor:', 'Login ID:', 'Password:', and 'Partner:'. At the bottom right, there are three buttons: 'OK', 'Cancel', and 'Help'.**5. Enter the following settings on the Connection tabbed page, then click OK:**

- **PAC Hosted checkout page URL** - From PowerPAC, the redirect page link to the Payflow Link hosted checkout page (maximum 250 characters, alphanumeric). Obtain this setting from Payflow Link. Example: <https://payflowlink.paypal.com>
- **MPAC Hosted checkout page URL** - From Mobile PAC, the redirect page link to the Payflow Link hosted checkout page (maximum 250 characters, alphanumeric). Obtain this setting from Payflow Link.
- **Request secure token URL** - The PayFlow API URL:
<https://payflowpro.paypal.com> for live operation, or
<https://pilot-payflowpro.paypal.com> for test.
- **Vendor** - Optional. Your library's main account name. Obtain this setting from Payflow Link.
- **Login ID** - Your Payflow Link login ID.
- **Password** - Your Payflow Link password.
- **Partner** - Typically PayPal. However, if you set up an account through a partner such as bank, type the partner's code. Obtain this setting from your partner; for example, **WFB** for Wells Fargo bank.

6. To set up credit card payments from Polaris PowerPAC, be sure PayFlow Link is still selected in the Online Payments Settings dialog box, and follow these steps:

- a) Click the **PowerPAC** tab on the Online Payments Settings dialog box, if it is not already selected.

Online Payment Settings

Payment processing gateway
Payflow Link Properties

PowerPAC | Staff Client | ExpressCheck | Mobile PAC

☒ Allow online payments
 Minimum fine (\$): \$1.00
 Processing fee (\$): \$0.00
☐ Send email receipt
☐ Display privacy policy
☐ Display refund policy

☒ Allow donations
 Processing fee (\$): \$0.00
☒ Allow patron to designate title purchase

OK Cancel Help

- b)** Select (check) **Allow online payments**. The payment options become available.

Note:

The link for paying fines is on the Fines and Fees page of the patron account. Be sure the PowerPAC profile **Navigation: Fines & fees** is set to **Yes** for the organization. See ["Enable patron account access - PowerPAC"](#) in the *Polaris Public Access Administration Guide 4.1R2*.

- c)** Set the minimum fine amount you want to accept by credit card payment.

The default value is the lowest possible value, \$0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in the PAC.

- d)** To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
- e)** To display a privacy policy link in Polaris PowerPAC, select (check) **Display privacy policy**.

You specify your privacy policy text using Polaris WebAdmin (Language Editor). The message ID is **PACML_PAYMENT_PRIVACYPOLICY_1066**. The system uses the text specified for the patron's registered branch. For information about editing PAC language files, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

- f)** To display a refund policy link in Polaris PowerPAC, select (check) **Display refund policy**.

You specify your refund policy text using Polaris WebAdmin (Language Editor). The message ID is **PACML_PAYMENT_REFUNDPOLICY_1067**. The system uses the text specified for the patron's registered branch. For information about editing PAC language files, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

- g)** To accept credit card payments for donations, select (check) **Allow donations**.

In general, the list of “receiving” organizations in PAC is limited to those with credit card processing enabled. When a donation is made, the receiving organization’s credit card settings are applied. If the connection organization is a branch, and that branch has enabled credit card processing and donations, donations can only be made to that branch. However, if the PAC connection organization is the system and the system organization does not have donations enabled, the system checks to see if any library or branch organizations accept donations. If so, a donation can be made, and the list of receiving organizations includes those that accept donations. (The system organization does not appear in the list.) Thus systems that do not allow branch switching in PAC can still accept branch-level donations.

Important:

The donation Web part appears in the PAC dashboard when you assign it to the page. Be sure to assign the donation Web part to the pages where you want it to appear. See [“Assign Web parts to public pages”](#) in the *Polaris Public Access Administration Guide 4.1R2*.

- h)** To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is \$20.00.
- i)** To allow donors to direct a donation toward a title purchase in a specific subject area, select (check) **Allow patron to designate title purchase**.

This option places an appropriate control on the donations page, where the donor can specify a title purchase.

- 7.** To set up credit card payments from Mobile PAC, follow these steps:

- a)** Click the **Mobile PAC** tab on the Online Payments Settings dialog box.

The screenshot shows the 'Online Payment Settings' dialog box with the 'Mobile PAC' tab selected. The 'Payment processing gateway' is set to 'Payflow Link'. Under the 'Allow online payments' section, 'Allow online payments' is checked, with 'Minimum fine (\$)' set to \$5.00 and 'Processing fee (\$)' set to \$0.00. There are checkboxes for 'Send email receipt', 'Display privacy policy', and 'Display refund policy', all of which are currently unchecked. Under the 'Allow donations' section, 'Allow donations' is checked, with 'Processing fee (\$)' set to \$0.00. The 'Allow patron to designate title purchase' checkbox is also checked. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

- b)** Select (check) **Allow online payments**. The payment options become available.

Note:

The link for paying fines is on the Fines and Fees page of the patron account. Be sure the Mobile PAC profile **Navigation: Fines & fees** is set to **Yes** for the organization. See "[Patron Account \(My Account\) in Mobile PAC](#)" in the *Polaris Public Access Administration Guide 4.1R2*.

- c) Set the minimum fine amount you want to accept by credit card payment.

The default value is the lowest possible value, \$0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in Mobile PAC.

- d) To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
- e) To display a privacy policy link in Mobile PAC, select (check) **Display privacy policy**.

You specify your privacy policy text using Polaris WebAdmin (Language Editor). The message ID is **MP_CRUMBS_FINESANDFEES_PRIVACY**. The system uses the text specified for the patron's registered branch. For information about editing PAC language strings, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

- f) To display a refund policy link in Mobile PAC, select (check) **Display refund policy**.

You specify your refund policy text using Polaris WebAdmin (Language Editor). The message ID is **MP_CRUMBS_FINESANDFEES_REFUND_POLICY**. The system uses the text specified for the patron's registered branch. For information about editing PAC language strings, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

- g) To accept credit card payments for donations, select (check) **Allow donations**.

In general, the list of "receiving" organizations in PAC is limited to those with credit card processing enabled. When a donation is made, the receiving organization's credit card settings are applied. If the connection organization is a branch, and that branch has enabled credit card processing and donations, donations can only be made to that branch. However, if the PAC connection organization is the system and the system organization does not have donations enabled, the system checks to see if any library or branch organizations accept donations. If so, a donation can be made, and the list of receiving organizations includes those that accept donations. (The system organization does not appear in the list.) Thus systems that do not allow branch switching in PAC can still accept branch-level donations.

Important:

To display the donation link in Mobile PAC, set the Mobile PAC profile **Navigation: Donations** to **Yes**.

- h) To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is \$20.00.
- i) To allow donors to direct a donation toward a title purchase in a specific subject area, select (check) **Allow patron to designate title purchase**.

This option places an appropriate control on the donations page, where the donor can specify a title purchase.

8. Click **OK** to save your settings.

Related Information

- **Donation branch order in PAC** - In the PAC, the patron chooses a branch from a list when making a donation. The branch display order is controlled in PAC Administration. See [“Setting Up Polaris PowerPAC”](#) in the *Polaris Public Access Administration Guide 4.1R2*.
- **Suppressing a branch from the donation branch list** - Use the system-level PAC profile **Suppress branches** to prevent a branch from appearing in the list. For Polaris PowerPAC, this profile also suppresses the selected branches from the connection branch list (**Switch to another branch**), the list of branches on the Search Options scoping page, and the list of branches on the Advanced Search scoping page. For Mobile PAC, the profile suppresses the branch from the drop-down lists on the Library Hours and Preferences pages.
- **More information about preparing for e-commerce** - See the following documents on the Polaris Customer Extranet (www.polaristown.com):
 - *E-Commerce for Polaris Libraries* - Answers questions you may have as you prepare for e-commerce.
 - *Polaris E-Commerce Data Security Standard Implementation Guide* - Outlines secure data storage, network structure, and best practices for protecting cardholder data and meeting PCI-DSS standards.
 - *PCI PA-DSS “Attestation of Validation”* - Records PCI compliance certification for Polaris software, which Polaris customers can use to prove compliance for their payment application software as they proceed with their own PCI compliance process.

E-Commerce with Payments Gateway Secure Web Pay

Polaris supports Payments Gateway Secure Web Pay (SWP) for credit card payments from Polaris PowerPAC and Mobile PAC. Payments Gateway SWP is a hosted “redirect and postback” method of providing credit card payments from Polaris PAC applications. An advantage of this method is that much of the responsibility of PCI compliance falls to Payments Gateway, which handles authorization requirements, rather than the library. No credit card information is stored in the Polaris database when payment is made through the Payments Gateway hosted payments site. For more information about Payments Gateway, see <http://www.paymentsgateway.com/home.aspx>

The logged-on PAC user can select individual charges to pay or opt to pay all charges, but partial payments are not supported. The user must pay the full amount of all charges he has selected to pay. When the user clicks **Pay Fines Now**, the Payments Gateway Hosted Checkout page opens. After the credit card payment transaction has been set up and finalized, the user clicks a link to return to the Fines & Fees page in the Polaris patron account or another library-specified page. Payments Gateway sends an e-mail receipt for the payment to the user’s e-mail address specified on the Hosted Checkout page. Similar processing is available for donations.

The Polaris e-commerce licenses for Polaris PowerPAC and Mobile PAC (if your system includes Mobile PAC) are required to use this feature. For fine payments, both the PAC connection branch and the patron’s registered branch must support credit card processing. The patron’s registered branch settings determine the specific credit card processor and parameters. For donations, the selected recipient branch’s settings determine the specific credit card processor and parameters.

Payments from the staff client or from Polaris ExpressCheck are not supported.

Note:

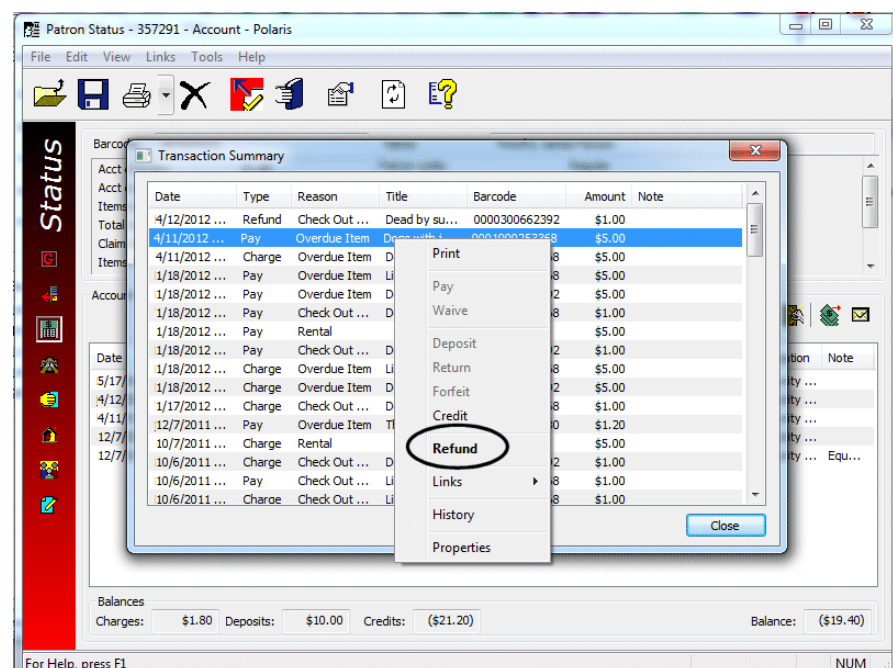
When the payment processing gateway for the staff client log-in branch is Payments Gateway, the Credit Card Payments Manager is not available from the **Utilities** menu. At branches where the Credit Card Payments Manager is accessible, store orders and store transactions do not appear for Payments Gateway transactions.

See the following topics:

- [“Refunds”](#) on page 121
- [“Excluding In-House Workstations from Web-Based Payments”](#) on page 123
- [“Polaris Standard Reports for Payments Gateway”](#) on page 123
- [“Payments Gateway Reports”](#) on page 124
- [“Set up the Payments Gateway SWP account”](#) on page 125
- [“Set up Payments Gateway processing in Polaris Administration”](#) on page 129

Refunds

With the Payments Gateway hosted solution, refund and void transactions are not integrated in Polaris. Credit card refunds must be handled separately, both through Payment Gateway's Virtual Terminal management interface and manually from the Polaris patron account in the Polaris staff client. For example, if a replacement charge has been paid via credit card, the refund must be issued manually from the Polaris patron account transaction summary and then again from the Virtual Terminal. Work with Payments Gateway to establish the appropriate staff accounts for handling refunds, then establish the refunds workflow with your staff. Do not allow staff to issue refunds to credit card payments from the Polaris patron account as cash or credit; instead, they must select **Refund**.

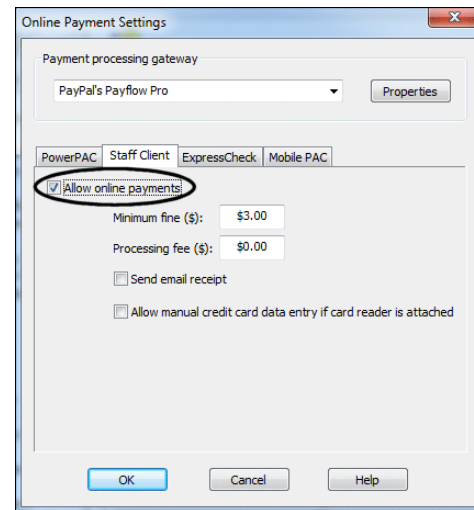


Note:

Voided payments, as when the connection fails, are not recognized in Polaris, and the voided transaction will appear in Polaris as a completed transaction.

Polaris also supports integrated (non-hosted) credit card processing, such as PayPal's Payflow Pro (see ["E-Commerce with PayPal® Payflow Pro®"](#) on page 86), which does offer credit card refunds from within Polaris. In systems where some sites use an integrated solution and others use a hosted gateway solution such as Payments Gateway, refunds can only be made in these circumstances:

- The staff client log-on branch supports integrated payments and the **Online Payments: Configure** option in Polaris Administration (Credit Card parameters) is set to allow payments from the staff client for the integrated solution.



- The original payment was made using the integrated solution and the **Online Payments: Configure** option is set to allow payments from the staff client for the integrated solution.

Otherwise, when an attempt is made to refund a credit card payment in Polaris, a message displays indicating that no refund transaction can be created. The credit card is not refunded and the patron account is left as is. This situation might occur if a consortium has implemented both integrated and hosted credit card payment solutions, or a library or consortium has changed from one solution to another and the refund is attempted after the change.

Lost Item Recovery

If a lost-and-paid item is recovered at check-in and the payment was made via credit card, and the library has set the lost-and-paid item recovery options to automatically credit the patron's account, a "dummy" refund is created instead of a credit. The refund will appear as a refund in the Polaris patron account and a refund transaction created. This transaction is available for reporting in the Refunds to Credit Card Payments report (see ["Polaris Standard Reports for Payments Gateway"](#) on page 123). You can use the report to cross-check transactions logged in the Virtual Terminal. (Note that the refund must also be made from the Virtual Terminal.)

Instead of automatically crediting the patron's account, you may want to set the lost-and-paid item recovery options to **Leave as is**. With this setting, the payments remain in the Polaris patron account and the refund or credit can be done from Payments Gateway. Or your library may choose to disable all automatic recovery actions, requiring staff to create manual refunds when a lost-and-paid item is recovered. For more information about setting lost item recovery options, see ["Setting Lost Item Recovery Defaults"](#) on page 248.

Excluding In-House Workstations from Web-Based Payments

To prevent web-based credit card payments from within the library, set the system-level Credit Card Payments parameter **Exclude local workstations from web based payments** to **Yes**. This setting supports a lower level of PCI compliance on the library's part by preventing payments through PayPal's Payflow Pro, or hosted gateway solutions such as Payments Gateway or Payflow Link, from within the library network. "Local workstations" are those defined in the In-House IP Addresses database table. Add the library's wi-fi connection to the table if you also want to exclude payments from mobile devices from within the library.

When you exclude local workstations from web-based payments, the **Pay** option is suppressed from the patron account Fines & Fees page, and the **Donation** link displays a message.

For more information about the In-House IP Address table, "[Identifying In-House Computers](#)" in the *Polaris Administration Guide 4.1R2*.

Polaris Standard Reports for Payments Gateway

These reports are available from the Polaris staff client **Utilities, Reports and Notices** menu (**Public Services, Patron Financial** folder).

Note:

The Polaris toolbar reports **Fines and Fees - Credit Card Payments** and **Donations - Credit Card Payments** record payments made through Payments Gateway, but do not reflect credit or void transactions. For details about these reports, see "[E-Commerce Credit Card Reports](#)" in the *Polaris Basics Guide 4.1R2*.

- **Refunds to Credit Card Payments** - Helps you track refunds to credit card payments that have been made in the Polaris patron account (see "[Refunds](#)" on page 121). You can set a date range and select one, several, or all organizations. Use this report to reconcile refund transactions made in Polaris with transactions in Payments Gateway.
- **Hosted Credit Card Payments** - Tracks credit card payments in the patron account made through the hosted gateway. You can set a date range and select one, several, or all organizations, and set a sort order by patron barcode, StoreOrder ID, or transaction date. The organization is the patron's registered branch for fines and fees payments, or the receiving branch for donations.

Note:

If your library accepts credit card payments through Payments Gateway for reasons other than patron fines and fees or donations, such as gift shop purchases, those payments do not appear on the Polaris Hosted Credit Card Payments report. However, the transactions are available in Payments Gateway reports.

Payments Gateway Reports

Payments Gateway offers extensive reporting capabilities. After your account is established (see “Set up the Payments Gateway SWP account” on page 125), you can log in and select **Transactions** to search for specific transactions.

Monday, April 30, 2012 Logged in as: Test User Home | Logout

Transactions

Search Transactions

Report: All Merchant: [Dropdown]

From: 04/23/2012 To: 04/30/2012

Selection: First Name Value: [Text] And ±

Search

First Name	Last Name	Order ID	Auth #	Date	Status	Response	Amount
Peng	Zhang	854	123456	04/30/2012	ready	A01	\$2.95
Peng	Test		123456	04/30/2012	ready	A01	\$2.95

Select **Reporting**, **Origination** to see detailed organization-level reports.

Transactions

Reporting

Origination

Deposit

Returns

Origination Reporting

ACH Origination Summary ACH Origination Detail

Received Summary Received Detail Received Detail Expanded

NewVT

1-2-3

Set up the Payments Gateway SWP account

Your library establishes a merchant account with Payments Gateway directly. You can set up one Payments Gateway SWP account for each branch that will offer credit card processing, or set up one account for your entire system, associated with a specific library administrator. Follow these steps to set up a Payments Gateway SWP account.

1. Go to <http://www.paymentsgateway.com/home.aspx> and follow the instructions to set up a SWP merchant account.
2. Log in to Payments Gateway Virtual Terminal (VT) with your SWP Merchant ID, username, and password at <https://www.paymentsgateway.net/vt3/login.aspx>
3. On the Payments Gateway VT page, select **Gateway Settings, Gateway Key.**
4. Generate the API Login ID and the Secure Transaction Key.

Record these values for use in Polaris Administration. See [“Set up Payments Gateway processing in Polaris Administration”](#) on page 129.

5. Click **Update**.
6. Select **Gateway Settings, Secure Web Pay**.
7. Click the **Main** tab if it is not already selected.
8. In the **Return Page 1** field, enter the post-back URL for your site: <https://www.mylibrary.org/polaris/Payments/PostbackPaymentsGateway.aspx>, where www.mylibrary.org/polaris is your PAC web site. (Both PowerPAC and Mobile PAC use the same post-back URL.)

Important:

Payments Gateway does not accept hyphens in the post-back URL (Return Page 1).

You will enter the same URL in Polaris Administration. See [“Set up Payments Gateway processing in Polaris Administration”](#) on page 129.

Payments Gateway

Tuesday, April 10, 2012

Logged in as: Test User [Home](#) | [Logout](#)

Transactions Reporting Clients Knowledge Center User Options Merchant Options Gateway Settings

Main Settings Main Messages Field Settings Style Build Form

Merchant: TEST/POLARIS

Settings

Accept Unsigned Transactions: Yes

Return Page 1: <https://> /postpi±

eCheck

Accept eCheck Transactions: No

☐ Debit ☐ Credit ☐ Auth Only

Credit Cards

Accept Credit Card Transactions: Yes

☒ Debit ☐ Credit ☒ Auth Only

Card Types

☒ Master Card ☒ Visa ☒ Discover

☒ American Express

Scheduled Transactions

Accept Scheduled Transactions: No

☐ eCheck ☐ Credit Card

9. Set Accept Unsigned Transactions to No.

Payments Gateway

Tuesday, April 10, 2012

Logged in as: Test User

Transactions Reporting Clients Knowledge Center User Options Merchant Options Gateway Settings

Main Settings Main Messages Field Settings Style Build Form

Merchant: TEST/POLARIS

Settings

Accept Unsigned Transactions: No

Return Page 1: <http://> /postpi±

eCheck

Accept eCheck Transactions: No

☐ Debit ☐ Credit ☐ Auth Only

Credit Cards

Accept Credit Card Transactions: Yes

☒ Debit ☐ Credit ☒ Auth Only

Card Types

☒ Master Card ☒ Visa ☒ Discover

10. Set Accept eCheck to No, and set Accept Credit Card Transactions to Yes.

Payments Gateway

Tuesday, April 24, 2012

Logged in as: Test User [Home](#) | [Logout](#)

Transactions Reporting Clients Knowledge Center User Options Merchant Options Gateway Settings

Main Settings Main Messages Field Settings Style Build Form

Merchant: TEST/POLARIS

Settings

Accept Unsigned Transactions: No

Return Page 1: /postpi±

eCheck

Accept eCheck Transactions: No

☐ Debit ☐ Credit ☐ Auth Only

Credit Cards

Accept Credit Card Transactions: Yes

☒ Debit ☐ Credit ☒ Auth Only

11. In the Contact Info section, supply the information that should appear on the Hosted Checkout page.

The screenshot shows the 'Main Settings' interface with the 'Main' tab selected. The 'Contact Info' section is circled in red. The form contains the following fields:

- Company Name: TEST/POLARIS
- Address 1: 500 W. Bethany Drive
- City: Allen
- Zip: 75013
- Fax:
- Email:
- Address 2: Suite 200
- State: TX
- Phone:

Below the 'Contact Info' section is the 'Configurable Links' section with four links and their URLs:

Link Desc	Link URL
Link 1 Desc: Home	Link 1 URL: https://www.paymentsgateway.net
Link 2 Desc: About Us	Link 2 URL: https://www.paymentsgateway.net
Link 3 Desc: Contact Us	Link 3 URL: https://www.paymentsgateway.net
Link 4 Desc: Login	Link 4 URL: https://www.paymentsgateway.net

An 'Update' button is located at the bottom right of the 'Configurable Links' section.

12. Click Update.

13. Click the **Field Settings** tab and make the following settings:

- **Bill To Information** settings are recommended.
- **Ship To Information** - We recommend that you set these fields to **Hidden**.
- **Merchant Defined Fields:**
 - Consumer order ID** - Displays the order ID on Payments Gateway reports, necessary for identifying transactions (set to **Required**). When this option is set to required, the order ID is also displayed on the Hosted Checkout page. You can type a description that will make sense to the patron; for example, **Polaris Payment ID**. Set the other Merchant Defined Fields to **Hidden**.

Payments Gateway

Tuesday, June 05, 2012

Logged in as: Test User Home | Logout

Gateway Settings

Main Messages **Field Settings** Style Build Form

Merchant: TEST/POLARIS

Bill To Information

Company Name: Hidden

First Name: Optional Last Name: Optional

Address: Optional Address 2: Optional

City: Optional State: Optional

Postal Code: Optional

Phone Number: Optional Email: Optional

Ship To Information

Name: Hidden

Address: Hidden Address 2: Hidden

City: Hidden State: Hidden

Postal Code: Hidden

Merchant Defined Fields

Show Legacy Settings

Field	Required	Validation Builder	Description
Consumer Order Id	Required	Select	Polaris ID
Wallet Id	Hidden	Select	
Data 1	Hidden	Select	
Data 2	Hidden	Select	
Data 3	Hidden	Select	
Data 4	Hidden	Select	

Update

NewVT

14. Click Update.

Related Information

Work with Payments Gateway to configure the messaging and other features on the Hosted Checkout page.

1-2-3

Set up Payments Gateway processing in Polaris Administration

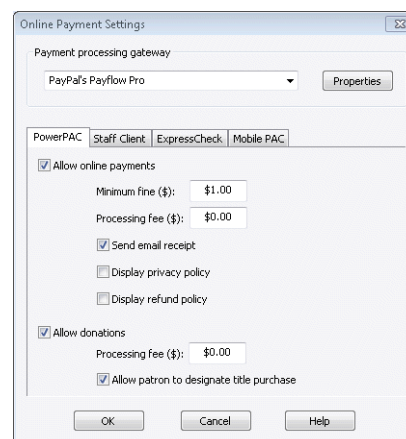
Follow these steps to set up Polaris for Payments Gateway SWP credit card processing in Polaris Administration.

Important:

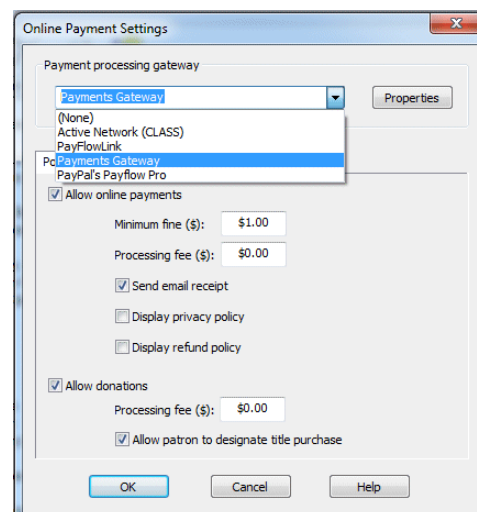
To accept PowerPAC online payments, you must enable secure socket layer (SSL) in Polaris Administration. Set the **SSL: Enable PowerPAC** parameter for the Web server to **Yes**. For Mobile PAC, set the **SSL: Enable Mobile PAC** parameter for the Web server to **Yes**. See ["Setting Web Server Parameters"](#) in the *Polaris Administration Guide 4.1R2*. Patrons must have SSL protocol enabled for their Web browsers and must accept the certificate the first time they log on from outside the library.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Credit Card Payment** tab in the details view.
2. Double-click **Online Payments: Configure**.

The Online Payments Settings dialog box opens.



3. Select **Payments Gateway** in the **Payment processing gateway** list.



4. Click Properties.

The Payments Gateway Properties dialog box opens.

The screenshot shows a dialog box titled "Payments Gateway" with a close button (X) in the top right corner. The "Connection" tab is selected. The dialog contains several text input fields for configuration:

- Hosted checkout page URL:
- Login ID:
- Secure Transaction Key:
- Current Version:
- Post-back URL:
- PAC Return URL:
- MPAC Return URL:
- Donations PAC Return URL:
- Donations MPAC Return URL:

At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

5. Enter the following settings on the Connection tabbed page and click OK:

- **Hosted checkout page URL** - The redirect page link to the Payments Gateway Hosted Checkout page (maximum 250 characters, alphanumeric). Obtain this setting from Payments Gateway.
Example: <https://sandbox.paymentsgateway.net/swp/co/default.aspx>
- **Login ID** - The API Log In ID generated on your Payments Gateway VT page (maximum 250 characters, alphanumeric). See ["Set up the Payments Gateway SWP account"](#) on page 125.
- **Secure Transaction Key** - The Secure Transaction Key generated on your Payments Gateway VT page (maximum 250 characters, alphanumeric). See ["Set up the Payments Gateway SWP account"](#) on page 125.
- **Current Version** - Payments Gateway Secure Web Pay API current version number (maximum 10 characters, alphanumeric). The current version is **1.0**.
- **Post-back URL** - The Payments Gateway term for this is Return Page 1. Enter the post-back URL for your site (maximum 250 characters, alphanumeric): <https://www.mylibrary.org/polaris/Payments/PostbackPaymentsGateway.aspx>, where www.mylibrary.org/polaris is your PAC web site.

Important:

Payments Gateway does not accept hyphens in the post-back URL (Return Page 1).

- **PAC Return URL** - Typically the Polaris PowerPAC patron account Fine & Fees page, displayed when the user clicks the return link on the Payments Gateway final payment transaction page (maximum 250 characters, alphanumeric):
<https://www.mylibrary.org/polaris/patronaccount/finesfees.aspx>, where www.mylibrary.org/polaris is your PAC web site.
 - **MPAC Return URL** - Typically the Polaris Mobile PAC patron account Fine & Fees page, displayed when the user clicks the return link on the Payments Gateway final payment transaction page (maximum 250 characters, alphanumeric):
<https://www.mylibrary.org/mobile/FinesAndFees/UpdateAccount>, where www.mylibrary.org/mobile is your Mobile PAC web site. This field is required. If you do not use Mobile PAC, simply enter your PAC Return URL.
 - **Donation PAC Return URL** - If you plan to accept donations, enter the URL of the Polaris PowerPAC page that should be displayed when the user clicks the return link on the Payments Gateway final payment transaction page (maximum 250 characters, alphanumeric). This URL is typically your Polaris PowerPAC home page. This field is required. If you do not plan to accept donations, simply enter your PAC Return URL.
 - **Donation MPAC Return URL** - If you plan to accept donations, enter the URL of the Polaris Mobile PAC page that should be displayed when the user clicks the return link on the Payments Gateway final payment transaction page (maximum 250 characters, alphanumeric). This URL is typically your Polaris Mobile PAC home page. If you do not plan to accept donations, or do not use Mobile PAC, simply enter your PAC Return URL.
6. To set up credit card payments from Polaris PowerPAC, be sure **Payments Gateway** is still selected in the Online Payments Settings dialog box, and follow these steps:
- a) Click the **PowerPAC** tab on the Online Payments Settings dialog box, if it is not already selected.

Online Payment Settings

Payment processing gateway
Payments Gateway Properties

PowerPAC Staff Client ExpressCheck Mobile PAC

☒ Allow online payments
 Minimum fine (\$): \$1.00
 Processing fee (\$): \$0.00
☐ Send email receipt
☐ Display privacy policy
☐ Display refund policy

☒ Allow donations
 Processing fee (\$): \$0.00
☒ Allow patron to designate title purchase

OK Cancel Help

- b)** Select (check) **Allow online payments**. The payment options become available.

Note:

The link for paying fines is on the Fines and Fees page of the patron account. Be sure the PowerPAC profile **Navigation: Fines & fees** is set to **Yes** for the organization. See ["Enable patron account access - PowerPAC"](#) in the *Polaris Public Access Administration Guide 4.1R2*.

- c)** Set the minimum fine amount you want to accept by credit card payment.
- The default value is the lowest possible value, \$0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in the PAC.
- d)** To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
- e)** To display a privacy policy link in Polaris PowerPAC, select (check) **Display privacy policy**.

You specify your privacy policy text using Polaris WebAdmin (Language Editor). The message ID is **PACML_PAYMENT_PRIVACYPOLICY_1066**. The system uses the text specified for the patron's registered branch. For information about editing PAC language files, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

- f)** To display a refund policy link in Polaris PowerPAC, select (check) **Display refund policy**.

You specify your refund policy text using Polaris WebAdmin (Language Editor). The message ID is **PACML_PAYMENT_REFUNDPOLICY_1067**. The system uses the text specified for the patron's registered branch. For information about editing PAC language files, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help. You can use this option to explain the library's refund policy as it applies to payments made through Payments Gateway. See "[Refunds](#)" on page 121.

- g)** To accept credit card payments for donations, select (check) **Allow donations**.

In general, the list of "receiving" organizations in PAC is limited to those with credit card processing enabled. When a donation is made, the receiving organization's credit card settings are applied. If the connection organization is a branch, and that branch has enabled credit card processing and donations, donations can only be made to that branch. However, if the PAC connection organization is the system and the system organization does not have donations enabled, the system checks to see if any library or branch organizations accept donations. If so, a donation can be made, and the list of receiving organizations includes those that accept donations. (The system organization does not appear in the list.) Thus systems that do not allow branch switching in PAC can still accept branch-level donations.

Important:

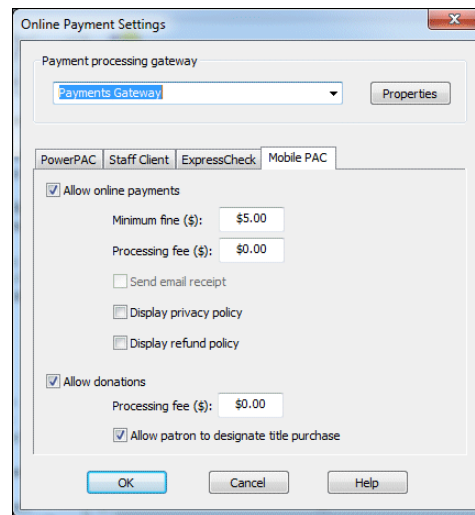
The donation Web part appears in the PAC dashboard when you assign it to the page. Be sure to assign the donation Web part to the pages where you want it to appear. See "[Assign Web parts to public pages](#)" in the *Polaris Public Access Administration Guide 4.1R2*.

- h)** To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is \$20.00.
- i)** To allow donors to direct a donation toward a title purchase in a specific subject area, select (check) **Allow patron to designate title purchase**.

This option places an appropriate control on the PAC donations page, where the donor can specify a title purchase.

7. To set up credit card payments from Mobile PAC, follow these steps:

a) Click the **Mobile PAC** tab on the Online Payments Settings dialog box.



b) Select (check) **Allow online payments**. The payment options become available.

Note:

The link for paying fines is on the Fines and Fees page of the patron account. Be sure the Mobile PAC profile **Navigation: Fines & fees** is set to **Yes** for the organization. See "[Patron Account \(My Account\) in Mobile PAC](#)" in the *Polaris Public Access Administration Guide 4.1R2*.

c) Set the minimum fine amount you want to accept by credit card payment.

The default value is the lowest possible value, \$0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in Mobile PAC.

d) To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.

e) To display a privacy policy link in Mobile PAC, select (check) **Display privacy policy**.

You specify your privacy policy text using Polaris WebAdmin (Language Editor). The message ID is

MP_CRUMBS_FINESANDFEES_PRIVACY. The system uses the text specified for the patron's registered branch. For information about editing PAC language strings, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

- f) To display a refund policy link in Mobile PAC, select (check) **Display refund policy**.

You specify your refund policy text using Polaris WebAdmin (Language Editor). The message ID is **MP_CRUMBS_FINESANDFEES_REFUND_POLICY**. The system uses the text specified for the patron's registered branch. For information about editing PAC language strings, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help. You can use this option to explain the library's refund policy as it applies to payments made through Payments Gateway. See "[Refunds](#)" on page 121.

- g) To accept credit card payments for donations, select (check) **Allow donations**.

In general, the list of "receiving" organizations in PAC is limited to those with credit card processing enabled. When a donation is made, the receiving organization's credit card settings are applied. If the connection organization is a branch, and that branch has enabled credit card processing and donations, donations can only be made to that branch. However, if the PAC connection organization is the system and the system organization does not have donations enabled, the system checks to see if any library or branch organizations accept donations. If so, a donation can be made, and the list of receiving organizations includes those that accept donations. (The system organization does not appear in the list.) Thus systems that do not allow branch switching in PAC can still accept branch-level donations.

Important:

To display the donation link in Mobile PAC, set the Mobile PAC profile **Navigation: Donations** to **Yes**.

- h) To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is \$20.00.
- i) To allow donors to direct a donation toward a title purchase in a specific subject area, select (check) **Allow patron to designate title purchase**.

This option places an appropriate control on the donations page, where the donor can specify a title purchase.

8. Click **OK** to save your settings.

Related Information

- **Donation branch order in PAC** - In the PAC, the patron chooses a branch from a list when making a donation. The branch display order is controlled in PAC Administration. See [“Setting Up Polaris PowerPAC”](#) in the *Polaris Public Access Administration Guide 4.1R2*.
- **Suppressing a branch from the donation branch list** - Use the system-level PAC profile **Suppress branches** to prevent a branch from appearing in the list. For Polaris PowerPAC, this profile also suppresses the selected branches from the connection branch list (**Switch to another branch**), the list of branches on the Search Options scoping page, and the list of branches on the Advanced Search scoping page. For Mobile PAC, the profile suppresses the branch from the drop-down lists on the Library Hours and Preferences pages.
- **More information about preparing for e-commerce** - See the following documents on the Polaris Customer Extranet (www.polaristown.com):
 - *E-Commerce for Polaris Libraries* - Answers questions you may have as you prepare for e-commerce.
 - *Polaris E-Commerce Data Security Standard Implementation Guide* - Outlines secure data storage, network structure, and best practices for protecting cardholder data and meeting PCI-DSS standards.
 - *PCI PA-DSS “Attestation of Validation”* - Records PCI compliance certification for Polaris software, which Polaris customers can use to prove compliance for their payment application software as they proceed with their own PCI compliance process.

E-Commerce with Comprise™ SmartPAY™

Polaris supports e-commerce with Comprise SmartPAY Merchant Service Program (MSP) from Comprise Technologies, Inc., a PCI-compliant hosted payment solution suitable for both Polaris Virtual Private Cloud (Hosted) and Polaris ILS turnkey customers in the United States and Canada. Comprise SmartPAY, which handles authorization requirements, is responsible for PCI compliance. Polaris stores only the last four digits of the credit card number and the store order when payment is made through Comprise SmartPAY. For more information about the Comprise SmartPAY solution, see

http://www.comprisetechologies.com/?page_id=32

With Comprise SmartPAY MSP, the library can accept credit card and debit card payments made from the Polaris staff client, Polaris ExpressCheck, Polaris PowerPAC, and Mobile PAC.

See the following topics:

- [“Requirements”](#) on page 137
- [“Partial Payments”](#) on page 138
- [“Refunds to Credit Card”](#) on page 138
- [“Staff Client Payment Workflow”](#) on page 139
- [“ExpressCheck Payment Workflow”](#) on page 140
- [“PAC Payment Workflow”](#) on page 141
- [“Excluding In-House Workstations from Web-Based Payments”](#) on page 144
- [“Credit Card Payment Manager”](#) on page 144
- [“SmartPAY Staff User Interface”](#) on page 145
- [“Polaris Standard Reports - Comprise SmartPAY”](#) on page 146
- [“Set up Comprise SmartPAY processing in Polaris Administration”](#) on page 146

Requirements

Comprise SmartPAY uses a single SmartServer linked with your library's Polaris database, and the library will have a single Comprise account for all payment portals. Each staff client and ExpressCheck workstation that will accept credit card payments must have a Comprise SmartTerminal (the SmartPAY card reader device) connected to it.

A single Polaris license is required to enable SmartPAY in the staff client, PowerPAC, Mobile PAC, and Polaris ExpressCheck. If both SmartPAY and some other e-commerce solution are used in a single system, Polaris licenses are required for both payment options.

Partial Payments

Partial payments are supported in the staff client only; from the patron Account Fines and Fees page in PAC and ExpressCheck, the patron can select specific fines to pay or opt to pay all, but cannot make partial payments. For fine payments from PAC, both the PAC connection branch and the patron's registered branch must support credit card processing. The patron's registered branch settings determine the specific credit card processor and parameters. For donations, the selected recipient branch's settings determine the specific credit card parameters.

Note:

Credit card payments for Polaris Fusion digital materials through SmartPAY are not available at this time.

Refunds to Credit Card

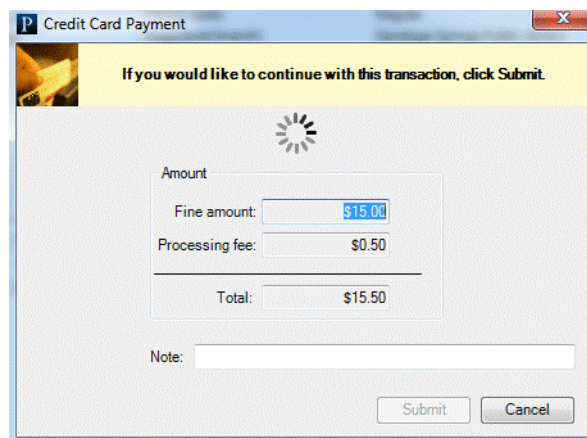
Refunds must be performed at a staff client workstation with a SmartPAY SmartTerminal device attached. Both the branch that took the payment and the branch issuing the refund must use SmartPAY. The refund transaction is initiated in Polaris, for example from the Patron Account. The user is prompted to swipe the card in the SmartTerminal device. The same card that made the payment must be used. Each refund requires a card swipe. If the user is refunding 3 separate payments, the card must be swiped 3 times.

SmartPAY refunds are issued "per payment," not per charge. For example:

- If 3 charges were paid with a single payment transaction, the total of all 3 can be refunded with a single refund transaction/card swipe.
- If 3 charges were paid with 3 separate payment transactions, then each must be refunded with separate refund transactions—3 card swipes.
- Partial refunds are supported when refunding any payment. If 3 charges were paid with a single transaction, a partial refund of each payment is supported.
- Automatic refunds related to lost item recovery are not supported. Polaris recommends that you disable any Refund option for lost-and-paid recovery when using SmartPAY. If automatic refund is enabled with SmartPay, the payment will be left as is in the patron account. No refund is created.
- Refunds made from the SmartPAY web interface (not using the API from within the Polaris staff client) are not reflected in the patron account and cannot be duplicated in Polaris.

Staff Client Payment Workflow

The staff member can pay a patron's charges via Comprise SmartPAY when Comprise SmartPAY is the selected payment gateway for the staff member's log-on branch (see ["Set up Comprise SmartPAY processing in Polaris Administration"](#) on page 146), and a SmartTerminal is connected to the workstation. The system checks whether the payment is an overpayment, which is not allowed, or under the minimal amount set for credit card transactions, and displays appropriate messages to stop the transaction in these cases. Otherwise, the Credit Card Payment dialog box opens.

A screenshot of the 'Credit Card Payment' dialog box. The title bar says 'P Credit Card Payment'. Below the title bar is a yellow banner with the text 'If you would like to continue with this transaction, click Submit.' and a loading spinner icon. The main area contains a table with the following data: 'Amount' (header), 'Fine amount: \$15.00', 'Processing fee: \$0.50', and 'Total: \$15.50'. Below the table is a 'Note:' field with a text input area. At the bottom right are 'Submit' and 'Cancel' buttons.**Note:**

Entries in the Note field on this dialog box appear on the Polaris Store Order. For information about viewing credit card transactions and "orders," see ["Managing Credit Card Orders"](#) in the *Polaris Patron Services Guide 4.1R2*.

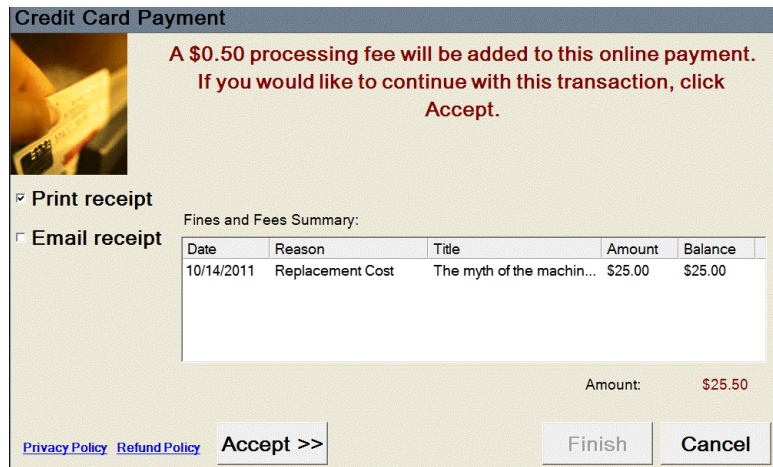
When the staff member clicks **Submit**, the system creates Store Order, Store Transaction, and Store Details entries with Pending status, sends the request to SmartPAY, and sends a query result request to SmartPAY every 5 seconds. When the credit card is swiped at the SmartTerminal device and authorized, the system notifies SmartPAY that the transaction is finished, the ILS Store Order is updated to Complete status and the ILS Store Transaction to Success status, and the patron account is updated. A confirmation message is displayed after a few seconds, and a receipt is generated as with any other payment method.

Possible error messages include the following:

- **Timeout message** - The transaction timed out and is cancelled.
- **Payment did not go through as entered** - Transaction is not authorized or is canceled by SmartPAY.
- **Update patron account failed** - The patron's credit card was charged, but the patron account was not updated.

ExpressCheck Payment Workflow

The ExpressCheck workstation must be equipped with a SmartTerminal card reader. The logged-on ExpressCheck user selects the charges to pay on the patron account Fines & fees page, and selects **Pay**. The confirmation screen is displayed.



Credit Card Payment

A \$0.50 processing fee will be added to this online payment.
If you would like to continue with this transaction, click **Accept**.

☒ Print receipt
☐ Email receipt

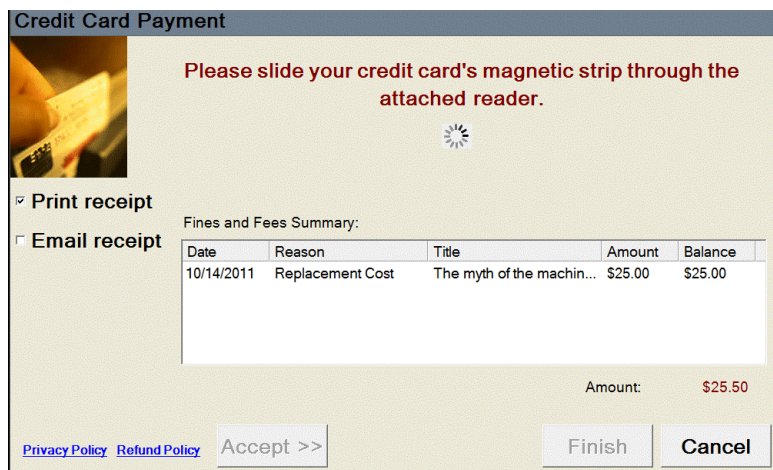
Fines and Fees Summary:

Date	Reason	Title	Amount	Balance
10/14/2011	Replacement Cost	The myth of the machin...	\$25.00	\$25.00

Amount: **\$25.50**

[Privacy Policy](#) [Refund Policy](#) **Accept >>** **Finish** **Cancel**

When the user selects **Accept**, the screen instructs the user to swipe the credit card at the SmartTerminal device.



Credit Card Payment

Please slide your credit card's magnetic strip through the attached reader.

☒ Print receipt
☐ Email receipt

Fines and Fees Summary:

Date	Reason	Title	Amount	Balance
10/14/2011	Replacement Cost	The myth of the machin...	\$25.00	\$25.00

Amount: **\$25.50**

[Privacy Policy](#) [Refund Policy](#) **Accept >>** **Finish** **Cancel**

The Polaris system creates Store Order, Store Transaction, and Store Details entries with Pending status, sends the request to SmartPAY, and sends a query result request to SmartPAY every 5 seconds. When the credit card is swiped at the SmartTerminal device and authorized, a success message is displayed and the user selects **Finish**.

Credit Card Payment

Please click the Finish button to complete this transaction.

Authorization Successful!

☒ Print receipt
☒ Email receipt

Fines and Fees Summary:

Date	Reason	Title	Amount	Balance
10/14/2011	Replacement Cost	The myth of the machin...	\$25.00	\$25.00

Amount: **\$25.50**

[Privacy Policy](#) [Refund Policy](#)

The Polaris system then notifies SmartPAY the transaction is finished, the ILS Store Order is updated to Complete status and the ILS Store Transaction to Success status, and the patron account is updated. A print or e-mail receipt is generated according to the receipt option the user selected.

Possible error messages include the following:

- **Timeout message** - The transaction timed out and is cancelled.
- **Payment did not go through as entered** - Transaction is not authorized or is canceled by SmartPAY. The user selects **Cancel** to cancel the transaction and return to the Patron Account view.
- **Update patron account failed** - The user's credit card was charged, but the patron account was not updated. The user is advised to select **Finish** and contact a librarian.

PAC Payment Workflow

Payments from PowerPAC and Mobile PAC are Web-based, and patrons enter their credit card information by typing it in an on-screen form.

Note:

You can prevent Web-based credit card payments from within the library by setting the system-level Credit Card Payments parameter **Exclude local workstations from web based payments** to **Yes**. See ["Excluding In-House Workstations from Web-Based Payments"](#) on page 144.

The logged-on PAC user selects the charges to pay on the patron account Fines & Fees page, and clicks **Pay Fines Now**. If the library has specified a processing fee, a message is displayed.

Saratoga Springs Public Library

LIBRARY INFO ▼ SEARCH ▼ COMMUNITY ▼ MY ACCOUNT ▼ HE

Payment Processing Fees

A \$3.00 processing fee will be added to this online payment. If you would like to continue with this transaction, click Accept.

[Privacy Policy](#) | [Refund Policy](#)

When the user clicks **Accept**, the Fines & Fee summary page is displayed. This page totals the selected charges and processing fee, if any, and informs the user that they will be redirected to SmartPAY.

Saratoga Springs Public Library

LIBRARY INFO ▼ SEARCH ▼ COMMUNITY ▼ MY ACCOUNT ▼

Fines and Fees

Type	Reason	Title	Amount
Charge	Overdue Item	The two minute rule [compact audio disc]	\$5.00
Charge	Replacement Cost	The dramatist : [compact audio disc] a novel	\$49.95
Charge	Processing Fee		\$3.00
Total			\$57.95

You will be redirected to SmartPay ...

[Privacy Policy](#) | [Refund Policy](#)

When the user clicks **Continue**, the SmartPAY checkout page opens.

Note:

The “time remaining” value on this page is configured by Comprise SmartPAY. The default value is 90 seconds.

SMARTPAY System

Anytown Public Library
37 Main Avenue
Ocean Grove, NJ 07752
TLF: 800-854-6822

SmartPAY *The Easy, Convenient Way to Make Library Payments!*

Please enter the required information in the form below. Click the **Finish** button when done.

AMOUNT: \$5.00

CREDIT CARD INFORMATION

Card Type:

Name on Card:

Card Billing Address:

Card Billing Zipcode:

CREDIT CARD #: Enter digits only, No spaces

Expiration Date: mm/yy

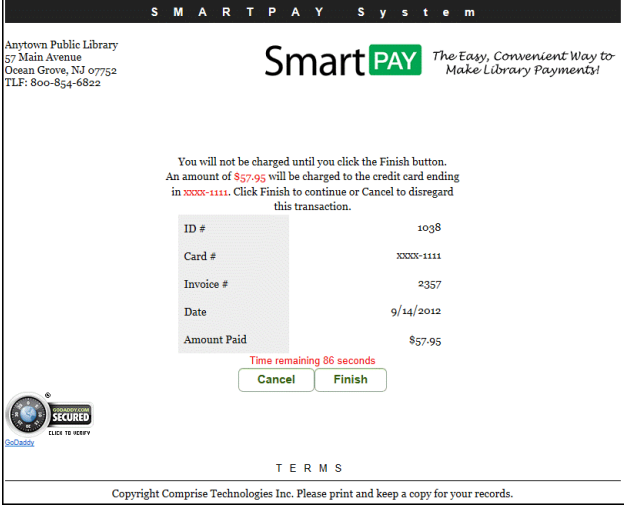
Security (CVV) Code: [What is CVV?](#)

Email:

Time remaining 51 seconds

T E R M S

The user enters credit card payment information and an e-mail address. SmartPAY will send an e-mail receipt for the payment to the e-mail address specified on this page. When the user clicks **FINISH**, the SmartPAY payment confirmation page is displayed. The ID number on this page is the Polaris patron record ID, and the invoice number is the Polaris Store Order ID.



S M A R T P A Y S y s t e m

Anytown Public Library
57 Main Avenue
Ocean Grove, NJ 07752
TLF: 800-854-6822

SmartPAY The Easy, Convenient Way to Make Library Payments!

You will not be charged until you click the Finish button.
An amount of \$57.95 will be charged to the credit card ending in XXXX-1111. Click Finish to continue or Cancel to disregard this transaction.

ID #	1038
Card #	XXXX-1111
Invoice #	2357
Date	9/14/2012
Amount Paid	\$57.95

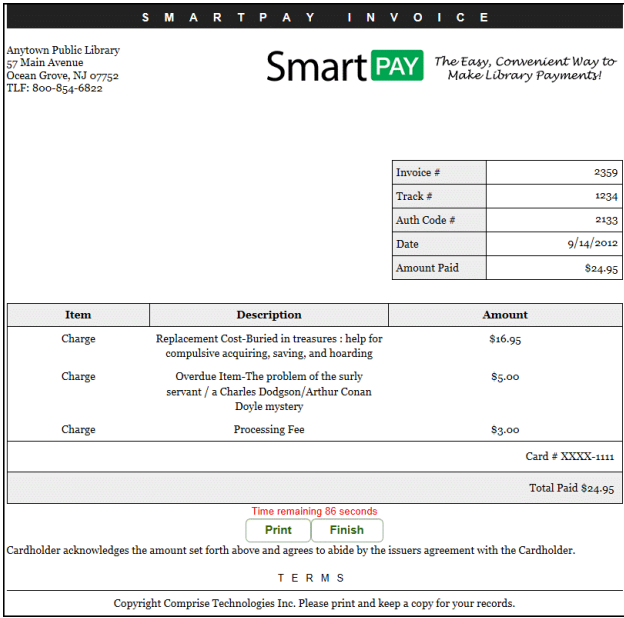
Time remaining 86 seconds

 CLICK TO VERIFY

T E R M S

Copyright Comprise Technologies Inc. Please print and keep a copy for your records.

When the user clicks **Finish**, a printable receipt page is displayed. The library information shown on the e-mail receipt and on this page is specified by Comprise as part of your setup process. The Invoice number is the Polaris Store Order ID, and the Track number is the Comprise transaction ID. The user can click **Print** to print the receipt, or click **Finish** to return to the Polaris PAC page specified in Polaris Administration (see [“Set up Comprise SmartPAY processing in Polaris Administration”](#) on page 146). Similar processing is available for donations.



S M A R T P A Y I N V O I C E

Anytown Public Library
57 Main Avenue
Ocean Grove, NJ 07752
TLF: 800-854-6822

SmartPAY The Easy, Convenient Way to Make Library Payments!

Invoice #	2359
Track #	1234
Auth Code #	2133
Date	9/14/2012
Amount Paid	\$24.95

Item	Description	Amount
Charge	Replacement Cost-Buried in treasures : help for compulsive acquiring, saving, and hoarding	\$16.95
Charge	Overdue Item-The problem of the surly servant / a Charles Dodgson/Arthur Conan Doyle mystery	\$5.00
Charge	Processing Fee	\$3.00
		Card # XXXX-1111
		Total Paid \$24.95

Time remaining 86 seconds

Cardholder acknowledges the amount set forth above and agrees to abide by the issuers agreement with the Cardholder.

T E R M S

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Excluding In-House Workstations from Web-Based Payments

To prevent web-based credit card payments from within the library, set the system-level Credit Card Payments parameter **Exclude local workstations from web based payments** to **Yes**. This setting supports a lower level of PCI compliance responsibility on the library's part by preventing web-based payments through SmartPAY from within the library network. "Local workstations" are those defined in the In-House IP Addresses database table. Add the library's wi-fi connection to the table if you also want to exclude payments from mobile devices within the library.

When you exclude local workstations from web-based payments, the **Pay** option is suppressed from the patron account Fines & Fees page, and the **Donation** link displays a message.

For more information about the In-House IP Address table, see ["Identifying In-House Computers"](#) in the *Polaris Administration Guide 4.1R2*.

Credit Card Payment Manager

Staff members can view transaction details and refund payments made with a credit card using the Credit Card Payment Manager, available from the Utilities menu on the Polaris Shortcut Bar. The system Circulation permission, **Access Credit Card Payments Manager: Allow**, is required to access the Credit Card Payment Manager.

The Credit Card Payment Manager shows only those orders and transactions where the staff client workstation's log-on branch and the transacting branch use the same payment gateway. SmartPAY transactions are included in the Credit Card Payment Manager, and you can process credits and refunds to a payment made via SmartPAY through the Credit Card Payment Manager's Store Order workform. Polaris patron records are updated appropriately. A SmartTerminal connected to the workstation is required for credits and refunds.

Note:

The patron address is not displayed in the Credit Card Manager for payments made via SmartPAY.

For more information about using the Credit Card Payment Manager, see ["Managing Credit Card Orders"](#) in the *Polaris Patron Services Guide 4.1R2*.

SmartPAY Staff User Interface

SmartPAY also provides a SmartPAY API Staff User Interface at <https://dev.comprisetechologies.com/SMARTPAYAPI/WEBSMARTPAY.dll?Adminlogin>

You can use this interface to get a transaction report, and credit or void transactions.



SmartPAY *The Easy, Convenient Way to Make Library Payments!*

This website is a restricted resource of the SmartPAY Online Payment System. Access is limited to authorized users. Enter your User ID and Password to continue.

Account Login

User ID

Password

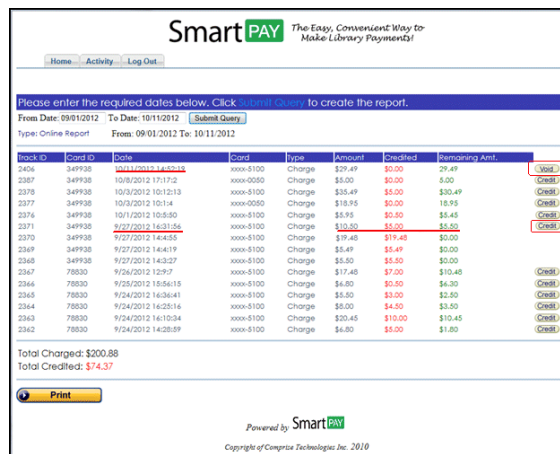
Log In

WARNING: Use of this system is restricted and monitored.

For questions about this website or technical support please contact a Customer Service Representative at 800-531-0132 or send email to: techsupport@comprisetechologies.com

Powered by **SmartPAY**
 Copyright of Comprise Technologies Inc. 2012

Supply the username and password provided by SmartPAY, and log in. From the **Activity** tab, you can list all transactions made from SmartPAY terminals or online for the specified time period.



SmartPAY *The Easy, Convenient Way to Make Library Payments!*

Home Activity Log Out

Please enter the required dates below. Click **Submit Query** to create the report.

From Date: 09/01/2012 To Date: 10/11/2012 **Submit Query**

Type: Online Report From: 09/01/2012 To: 10/11/2012

Trans ID	Card ID	Date	Card	Type	Amount	Credited	Remaining Amt.	
2376	349938	10/01/2012 14:02:34	xxxx-0100	Charge	\$29.49	\$0.00	\$29.49	
2387	349938	10/08/2012 17:17:12	xxxx-0050	Charge	\$5.00	\$0.00	\$5.00	Credit
2378	349938	10/3/2012 10:12:13	xxxx-0100	Charge	\$35.49	\$0.00	\$30.49	Credit
2377	349938	10/2/2012 10:1:4	xxxx-0050	Charge	\$15.95	\$0.00	\$15.95	Credit
2374	349938	10/1/2012 10:5:00	xxxx-0100	Charge	\$5.95	\$0.50	\$5.45	Credit
2371	349938	9/27/2012 14:31:56	xxxx-0100	Charge	\$10.50	\$5.00	\$5.50	Credit
2370	349938	9/27/2012 14:4:58	xxxx-0100	Charge	\$19.45	\$19.45	\$0.00	
2369	349938	9/27/2012 14:4:19	xxxx-0100	Charge	\$5.49	\$5.49	\$0.00	
2368	349938	9/27/2012 14:3:27	xxxx-0100	Charge	\$5.50	\$5.50	\$0.00	
2367	78830	9/26/2012 12:9:7	xxxx-0100	Charge	\$17.45	\$7.00	\$10.45	Credit
2364	78830	9/25/2012 18:56:18	xxxx-0100	Charge	\$4.50	\$0.50	\$4.00	Credit
2365	78830	9/24/2012 16:36:41	xxxx-0100	Charge	\$5.50	\$3.00	\$2.50	Credit
2364	78830	9/24/2012 16:25:14	xxxx-0100	Charge	\$5.00	\$4.50	\$0.50	Credit
2363	78830	9/24/2012 16:10:34	xxxx-0100	Charge	\$20.45	\$10.00	\$10.45	Credit
2362	78830	9/24/2012 14:28:39	xxxx-0100	Charge	\$4.50	\$5.00	\$1.00	Credit
Total Charged: \$200.88								
Total Credited: \$74.37								

Print

Powered by **SmartPAY**
 Copyright of Comprise Technologies Inc. 2010

Credits can be made for any transactions that were made before today and have a remaining payment balance. Voids can be made for payment transactions that were made today. However, Credits and Voids made from the SmartPay API Staff User Interface do not update the patron account in Polaris. The staff member must manually reconcile these transactions within Polaris.

Polaris Standard Reports - Comprise SmartPAY

SmartPAY transactions are included in the following standard Polaris toolbar reports, available in the **Public Services - Patron Financial** folder.

- Donations - Credit Card Payments
- Fines and Fees - Credit Card Payments
- Refunds to Credit Card Payments

For more information about these reports, see [“E-Commerce Credit Card Reports”](#) in the *Polaris Basics Guide 4.1R2*.

1-2-3

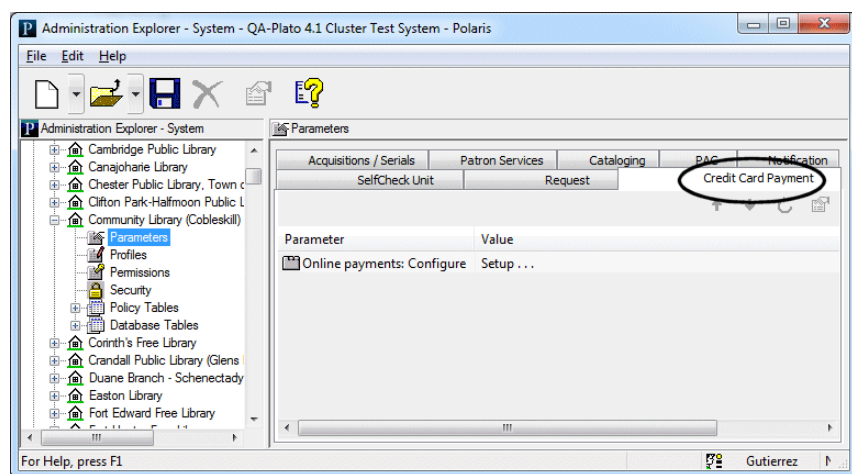
Set up Comprise SmartPAY processing in Polaris Administration

Only one payment gateway can be selected for a branch or library organization. However, within a consortium that uses the Polaris turnkey ILS, branch and library organizations may implement different gateways; some may use Comprise SmartPAY, while others may choose other gateways. Follow these steps to set up Polaris for Comprise SmartPAY credit card processing in Polaris Administration for the appropriate organizations.

Important:

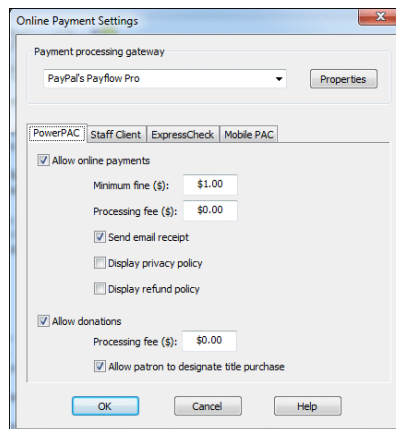
To accept PowerPAC online payments, you must enable secure socket layer (SSL) in Polaris Administration. Set the **SSL: Enable PowerPAC** parameter for the Web server to **Yes**. For Mobile PAC, set the **SSL: Enable Mobile PAC** parameter for the Web server to **Yes**. See [“Setting Web Server Parameters”](#) in the *Polaris Administration Guide 4.1R2*. Patrons must have SSL protocol enabled for their Web browser and must accept the certificate the first time they log on from outside the library.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Credit Card Payment** tab in the details view.

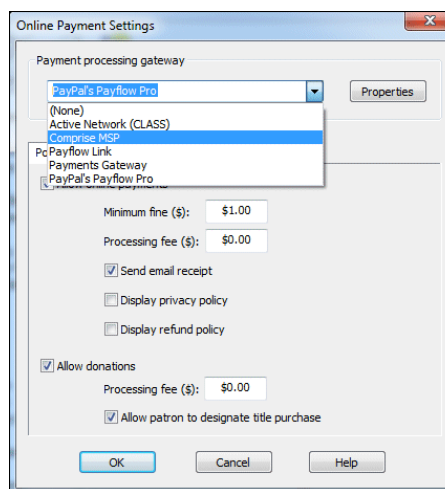


2. Double-click **Online Payments: Configure**.

The Online Payments Settings dialog box opens.

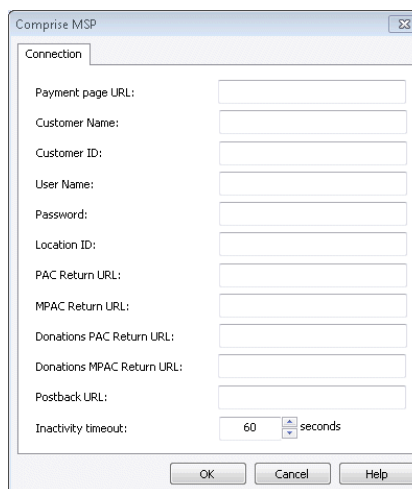


3. Select **Comprise MSP** in the **Payment processing gateway** list.



4. Click **Properties**.

The **Comprise MSP Properties** dialog box opens.



5. Enter the following settings on the Connection tabbed page, then click OK:
- **Payment page URL** (SmartPay API Address) - System level only. Provided by Comprise. This is the SmartPAY payment page.
 - **Customer Name** - System level only. Provided by Comprise, passed to SmartPay during the payment transaction. A branch can opt to use a different payment gateway, but all organizations that use Comprise MSP will use the same Customer Name and Customer ID.
 - **Customer ID** - System level only. Provided by Comprise, passed to SmartPay during the payment transaction. A branch can opt to use a different payment gateway, but all organizations that use Comprise MSP will use the same Customer Name and Customer ID.
 - **User name** - Provided by Comprise. Each branch has its own user name.
 - **Password** - Provided by Comprise. Each branch has its own password.
 - **Location ID** - Identifies the branch associated with in-house PAC workstations. (For online payments from remote workstations, the system uses the patron's registered branch.)
 - **PAC Return URL** - PowerPAC page to which the user is returned after fines payment, typically the patron account page. Maximum 250 alphanumeric characters.
 - **MPAC Return URL** - Mobile PAC page to which the user is returned after fines payment, typically the patron account page. Maximum 250 alphanumeric characters.

Note:

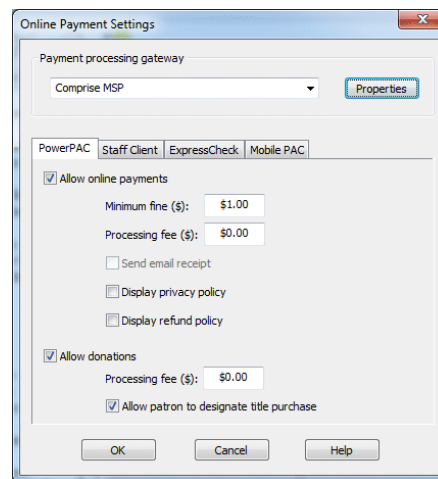
When a patron cancels a payment from PowerPAC or Mobile PAC, the appropriate Return URL page is displayed.

- **Donations PAC Return URL** - PowerPAC page to which the user is returned after a donation payment. Maximum 250 alphanumeric characters.
- **Donations MPAC Return URL** - Mobile PAC page to which the user is returned after a donation payment. Maximum 250 alphanumeric characters.
- **Postback URL** - The location on the library Web site used to update the Polaris database. This location applies to both PowerPAC and Mobile PAC, and is not branch-specific. Maximum 250 alphanumeric characters. Format:
`https://servername:port/payments/PostbackSmartpay.aspx`
For example:
`https://mylibrary.com/polaris/payments/PostbackSmartpay.aspx`
- **Inactivity timeout** - Specifies how long Polaris waits for the credit transaction to be processed before canceling it. This setting applies to ExpressCheck and the staff client only (not to PowerPAC or Mobile PAC).

Note:

You can also set an **Inactivity timeout** value set for ExpressCheck transactions (SelfCheck Unit parameters, **Polaris ExpressCheck: Options**). The default value for both settings is 60 seconds. Polaris ExpressCheck times out after the total of both settings to ensure that the ExpressCheck application never times out before the credit card transaction processing time.

6. To set up credit card payments from Polaris PowerPAC, be sure **Comprise MSP** is still selected in the Online Payments Settings dialog box, and follow these steps:
 - a) Click the **PowerPAC** tab on the Online Payments Settings dialog box, if it is not already selected.



- b) Select (check) **Allow online payments**. The payment options become available.

Note:

The link for paying fines is on the Fines and Fees page of the patron account. Be sure the PowerPAC profile **Navigation: Fines & fees** is set to **Yes** for the organization. See ["Enable patron account access - PowerPAC"](#) in the *Polaris Public Access Administration Guide 4.1R2*.

- c) Set the minimum fine amount you want to accept by credit card payment.

The default value is the lowest possible value, \$0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in the PAC.

- d) To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.

Note:

The e-mail receipt option is not applicable, because SmartPAY sends the receipt to the e-mail address the patron specifies on the SmartPAY payment page.

- e) To display a privacy policy link in Polaris PowerPAC, select (check) **Display privacy policy**.

Specify your privacy policy text using Polaris WebAdmin (Language Editor.) The message ID is **PACML_PAYMENT_PRIVACYPOLICY_1066**. The system uses the text specified for the patron's registered branch. For information about editing PAC language strings, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

- f)** To display a refund policy link in Polaris PowerPAC, select (check) **Display refund policy**.

Specify your refund policy text using Polaris WebAdmin (Language Editor). The message ID is **PACML_PAYMENT_REFUNDPOLICY_1067**. The system uses the text specified for the patron's registered branch. For information about editing PAC language strings, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

- g)** To accept credit card payments for donations, select (check) **Allow donations**.

In general, the list of "receiving" organizations in PAC is limited to those with credit card processing enabled. When a donation is made, the receiving organization's credit card settings are applied. If the connection organization is a branch, and that branch has enabled credit card processing and donations, donations can only be made to that branch. However, if the PAC connection organization is the system and the system organization does not have donations enabled, the system checks to see if any library or branch organizations accept donations. If so, a donation can be made, and the list of receiving organizations includes those that accept donations. (The system organization does not appear in the list.) Thus systems that do not allow branch switching in PAC can still accept branch-level donations.

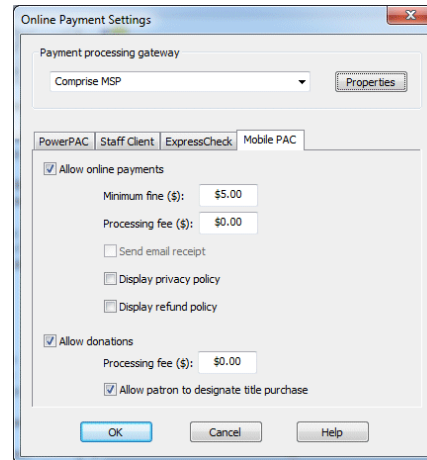
Important:

The donation Web part appears in the PowerPAC dashboard when you assign it to the page. Be sure to assign the donation Web part to the pages where you want it to appear. "[Assign Web parts to public pages](#)" in the *Polaris Public Access Administration Guide 4.1R2*.

- h)** To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is \$20.00.
- i)** To allow donors to direct a donation toward a title purchase in a specific subject area, select (check) **Allow patron to designate title purchase**.

This option places an appropriate control on the donations page, where the donor can specify a title purchase.

- 7.** To set up credit card payments from Mobile PAC, follow these steps:
- a)** Click the **Mobile PAC** tab on the Online Payments Settings dialog box.



- b)** Select (check) **Allow online payments**. The payment options become available.

Note:

The link for paying fines is on the Fines and Fees page of the patron account. Be sure the Mobile PAC profile **Navigation: Fines & fees** is set to **Yes** for the organization. See "[Patron Account \(My Account\) in Mobile PAC](#)" in the *Polaris Public Access Administration Guide 4.1R2*.

- c)** Set the minimum fine amount you want to accept by credit card payment.

The default value is the lowest possible value, \$0.01. If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in Mobile PAC.

- d)** To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.

Note:

The e-mail receipt option is not applicable, because SmartPAY sends the receipt to the e-mail address the patron specifies on the SmartPAY payment page.

- e)** To display a privacy policy link in Mobile PAC, select (check) **Display privacy policy**.

Specify your privacy policy text using Polaris WebAdmin (Language Editor). The message ID is **MP_CRUMBS_FINESANDFEES_PRIVACY**. The system uses the text specified for the patron's registered branch. For information about editing PAC language strings, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

- f)** To display a refund policy link in Mobile PAC, select (check) **Display refund policy**.

Specify your refund policy text using Polaris WebAdmin (Language Editor). The message ID is **MP_CRUMBS_FINESANDFEES_REFUND_POLICY**. The system uses the text specified for the patron's registered branch. For information about editing PAC language strings, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

- g)** To accept credit card payments for donations, select (check) **Allow donations**.

In general, the list of “receiving” organizations in PAC is limited to those with credit card processing enabled. When a donation is made, the receiving organization’s credit card settings are applied. If the connection organization is a branch, and that branch has enabled credit card processing and donations, donations can only be made to that branch. However, if the PAC connection organization is the system and the system organization does not have donations enabled, the system checks to see if any library or branch organizations accept donations. If so, a donation can be made, and the list of receiving organizations includes those that accept donations. (The system organization does not appear in the list.) Thus systems that do not allow branch switching in PAC can still accept branch-level donations.

Important:

To display the donation link in Mobile PAC, set the Mobile PAC profile **Navigation: Donations** to **Yes**.

- h)** To charge a processing fee for donations, specify the amount in the **Processing fee** box for donation payments. The maximum value is \$20.00.
- i)** To allow donors to direct a donation toward a title purchase in a specific subject area, select (check) **Allow patron to designate title purchase**.

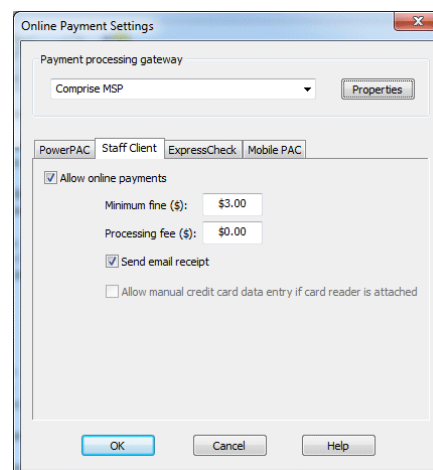
This option places an appropriate control on the donations page, where the donor can specify a title purchase.

- 8.** To set up credit card payments from the staff client, follow these steps:

Note:

To accept credit card payments, the staff client workstation must be equipped with a Comprise SmartTerminal credit card reader, and you must specify the SmartTerminal ID for each workstation. See step 11.

- a)** Click the **Staff Client** tab on the Online Payments Settings dialog box.



b) Select (check) Allow online payments.

The payment options become available.

- c) Set the minimum fine amount you want to accept by credit card payment.**
- d) To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.**
- e) To provide an automatic e-mail payment receipt to patrons, select (check) **Send email receipt**.**

The e-mail receipt is sent to the e-mail address in the patron record. If the patron record does not include an e-mail address, no e-mail receipt is sent. The staff member cannot specify an e-mail address during the payment process.

Note:

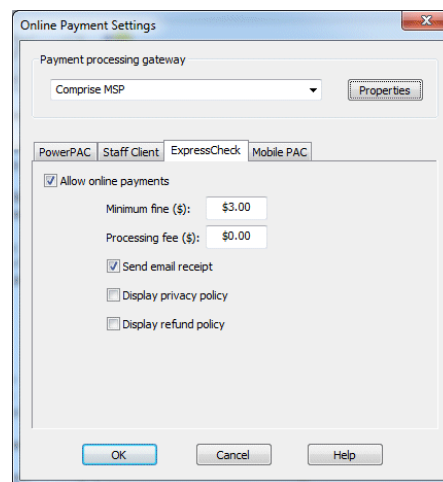
The manual data entry option is not applicable. Staff client workstations must use the Comprise SmartTerminal to swipe the patron's credit card.

- 9. To set up credit card payments from Polaris ExpressCheck, follow these steps:**

Note:

To accept credit card payments, the Polaris ExpressCheck workstation must be equipped with a Comprise SmartTerminal credit card reader, and you must specify the SmartTerminal ID for each workstation. See step 11.

- a) Click the **ExpressCheck** tab on the Online Payments Settings dialog box.**



- b) Select (check) Allow online payments.** The payment options become available.

Credit card payments for fines and fees are allowed from Polaris ExpressCheck if both the following conditions are true:

- The patron's registered branch allows credit card payments.
- The ExpressCheck workstation's branch allows credit card payments.

- c) Set the minimum fine amount you want to accept by credit card payment.
- d) To charge a processing fee for fine payments, specify the amount in the **Processing fee** box for online payments. The maximum value is \$20.00.
- e) To provide an automatic e-mail payment receipt to patrons, select (check) **Send email receipt**.

The e-mail receipt is sent to the e-mail address in the patron record. If the patron record does not include an e-mail address, no e-mail receipt is sent. The patron cannot specify an e-mail address during the payment process.

- f) To display a privacy policy link on the processing fee, payment, and payment verification pages in Polaris ExpressCheck, select (check) **Display privacy policy**.

When this option is checked, your privacy policy message is displayed when the patron selects the privacy policy link. Specify your privacy policy text using Polaris WebAdmin (Language Editor). The message ID is **EC_TEXT_POLICY_PRIVACY**. For information about editing ExpressCheck language strings, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online help.

- g) To display a refund policy link on the processing fee, payment, and payment verification pages in Polaris ExpressCheck, select (check) **Display refund policy**.

When this option is checked, your refund policy message is displayed when the patron selects the refund policy link. Specify your refund policy text using Polaris WebAdmin (Language Editor). The message ID is **EC_TEXT_POLICY_REFUND**. For information about editing ExpressCheck language strings, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online help.

10. Click **OK** to save your settings.

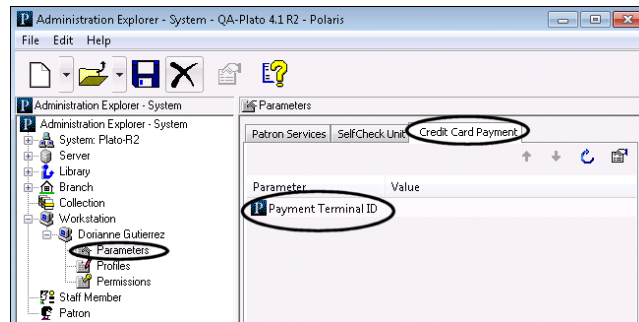
- 11.** For each staff client and ExpressCheck workstation with a SmartTerminal, specify the payment terminal ID by following these steps:

Note:

Comprise supplies the terminal ID values for your workstations.

- a) From the workstation listed in Administration Explorer or the workstation workform, select **Parameters, Credit Card Payment**.

The illustration shows the Administration Explorer.



b) Double-click **Payment Terminal ID** and enter the workstation SmartTerminal ID.

c) Select **File, Save**, or click .

Related Information

For more information about preparing for e-commerce, including compliance with PCI Security Council industry standards, see the following documents on the Polaris Customer Extranet:

- *E-Commerce for Polaris Libraries* - Answers questions you may have as you prepare for e-commerce.
- *Polaris E-Commerce Data Security Standard Implementation Guide* - Outlines secure data storage, network structure, and best practices for protecting cardholder data and meeting PCI-DSS standards.
- *PCI PA-DSS "Attestation of Validation"* - Records PCI compliance certification for Polaris software, which Polaris customers can use to prove compliance for their payment application software as they proceed with their own PCI compliance process.

Using Class Point of Sale with Polaris

Active Payment Manager (Class Point of Sale) manages cash, check, and credit card payments for the library and other agencies in the network. When a payment is made through Class POS (from the Polaris staff client or by credit card from PAC), the transaction is recorded in the patron's account in Polaris.

Note:

If you are working in the Polaris staff client, you may be able to take credit card payments in Class Point of Sale, but processing takes place entirely within Class Point of Sale.

Class POS Requirements

All system-defined Polaris fee reason codes (that is, codes equal to or less than 0) must be entered in the Class POS application as the "Third Party ID" for the corresponding Class POS item. Your Polaris Site Manager assists you in setting up these entries. This ensures that when a staff member selects an overdue item charge to pay in Polaris, for example, the Class POS software also identifies the reason for payment as overdue item.

Class POS software must be installed with the Polaris staff client on the workstation, but staff members do not need to start Class POS. You are prompted to log on to Class POS only once, at the first payment action in the Polaris staff client session.

Staff Client Workflow with Class POS

You can take payments for overdue charges from the Patron Status workform - Account view or from the Check In workform. The Class POS interface automatically opens, and you can make the payment according to the library's policies. Payments for billed and lost items must be made from the Patron Status workform - Account view.

Note:

When you pay from the Check In workform, but cancel the transaction in Class POS, the charge remains on the patron's account but does not appear again on the Check In workform. At this point, you must pay the charge from the Patron Status workform - Account view.

Payment transactions at check-out and at check-in *from the item record workform* are not integrated with Class POS, so you may want to set the system-level Circulation permission **Fines: pay fines at circ** so that staff are *not* allowed to pay fines through Polaris in these situations. Instead, the staff member creates a charge during the transaction, and then pays the charge

from the Patron Status workform - Account view. For example, if the Overdue Fine dialog box appears at renewal, and the patron wants to pay the fine, the staff member selects **Charge Account** in the Overdue Fine dialog box, then pays the charge from the Patron Status workform - Account view. If the Patron Status workform - Account view is already open, you can refresh the workform (F5) to see and pay the charge. You can also refund a credit through Class POS from the Patron Status workform - Account view. When the Refund function is selected, the Class POS application is launched to process the refund and the transaction is recorded in both Class POS and Polaris. For more information about refunding a credit, see [“Refund a credit amount”](#) in the *Polaris Patron Services Guide 4.1R2*.

Class POS does not handle payments from patron account credits or deposits. If your library relies on Class POS software and POS reports to reconcile the cash drawer with patron account transactions, you may want to prohibit deposit transactions in Polaris.

Important:

The effective interaction between Polaris and Class POS rests on charges, payments, and credit refunds being initiated in Polaris. It is possible to configure the Class POS interface independently of Polaris, and add options that might initiate a payment, charge, or refund from Class POS. However, Polaris interacts with Class POS as a payment manager only. For example, charges initiated and paid in Class POS can result in a credit transaction in the Polaris patron record that has no history in the Polaris database.

Polaris waive transactions are unaffected by the use of Class POS, and they are not registered or reported in Class POS.

Class POS Credit Card Transactions in PAC

You can accept credit card payments from the PAC through Class POS. To set up Polaris for Class POS credit card processing, you will need the following information from your Class POS representative:

- URL to the Class online payment page for your site
- Class POS database identifier (Item ID) for online library fine payments.

With Class POS processing, a logged-in patron can pay fines from the Fines and Fees page of the patron account. The patron simply clicks **Pay fines now**. The Class POS payment form opens, where the patron supplies the appropriate credit card information and completes the payment. The patron cannot select specific charges to pay, and Class POS does not support donations. For setup details, see [“Set up Class Point of Sale credit card payments”](#) on page 158.

Polaris Reports For Class POS Transactions

These reports help you reconcile Class POS transactions in Polaris. On the Polaris Shortcut Bar, select **Utilities, Reports and Notices, Public Services, Patron Financial, Active Network POS**.

- **Daily Cash Drawer POS** - A copy of the Daily Cash Drawer report that includes the POS Transaction ID for cash and check payment transactions.
- **Daily Cash Balance Detail** - Reports payments by payment type per the POS detail during a specified date range. The report includes only those POS payments taken in Polaris.
- **Non POS Payments** - For a specified date range, this report lists all payments made in Polaris that did not go through the POS system.
- **Sales Summary Report** - Comparable to a CLASS report that summarizes payments, refunds, and adjustments by reason for a specified date range. You can select organization, workstation, and user parameters.

Note:

For more information about patron financial reports, see [“Patron Financial Reports”](#) in the *Polaris Basics Guide 4.1R2*.

1-2-3

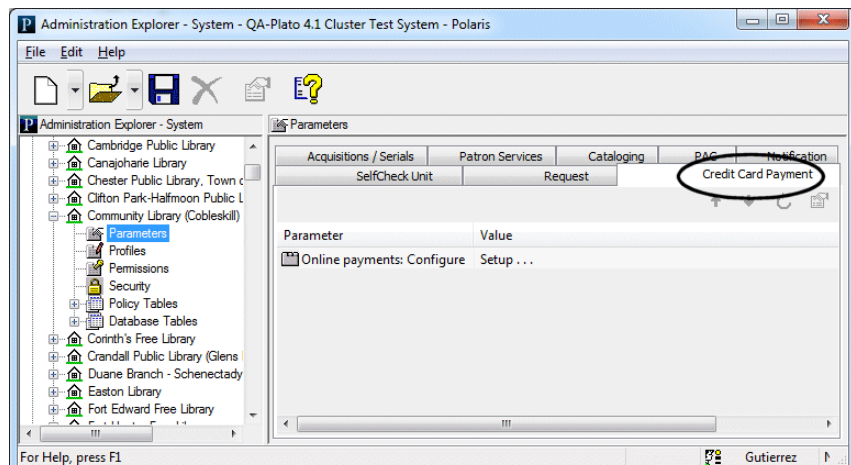
Set up Class Point of Sale credit card payments

Follow these steps to set up credit card payments from the PAC if your library uses Class Point of Sale.

Note:

Credit card processing from Polaris ExpressCheck is not supported through Class Point of Sale. If you are working in the staff client, you may be able to take credit card payments in Class Point of Sale but processing takes place entirely within Class Point of Sale.

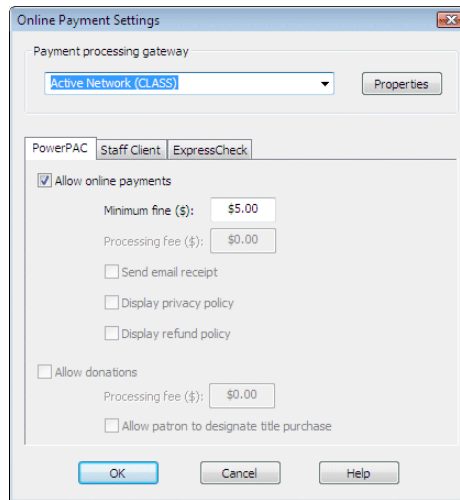
1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Credit Card Payment** tab in the details view.



2. Double-click **Online Payments: Configure**.

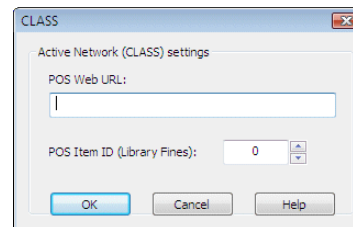
The Online Payments Settings dialog box appears.

3. Select **Active Network (CLASS)** in the **Payment processing gateway** list.



4. Click **Properties**.

The Class properties dialog box opens.



5. Enter the following settings, and click **OK**:

- **POS Web URL** - The URL to the Class online payment page for your site.
- **POS Item ID (Library Fines)** - The Class POS database identifier for online library fine payments.

Note:

Obtain these settings from your Class POS representative.

6. Click the **PowerPAC** tab on the Online Payments Settings dialog box, if it is not already selected.

Important:

To accept PAC online payments, you must obtain a Secure Socket Layer (SSL) certificate and enable SSL in Polaris Administration. Set the **SSL: Enable** parameter for the Web server to **Yes**. See ["Setting Web Server Parameters"](#) in the *Polaris Administration Guide 4.1R2*. Patrons must have SSL protocol enabled for their Web browser and must accept the certificate the first time they log on from outside the library.

7. Select (check) **Allow online payments**.

8. Set the minimum fine amount you want to accept by credit card payment.

If the amount the patron owes falls below your setting, the **Pay fines** link is not displayed in the PAC.

Note:

The link for paying fines is on the Fines and Fees page of the patron account. Be sure the PowerPAC profile **Navigation: Fines & fees** is set to **Yes** for the organization. See ["Enable patron account access - PowerPAC"](#) in the *Polaris Public Access Administration Guide 4.1R2*.

9. Click **OK** to save your settings.

Setting Up Circulation Workforms



You can customize the fields that appear on the Check Out and Check In workforms, so that only the information needed by your staff members is displayed. These options can be set at the system, library, or branch level using the Patron Services parameters **Check-out: Optional patron data** and **Check-in: Listview options**. The settings for the Check Out workform also apply to the patron data in the header of the Patron Status workform.

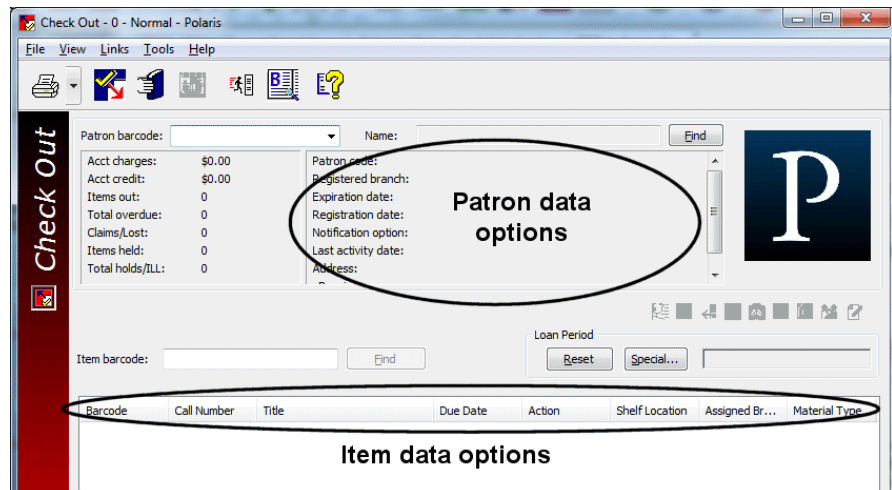
You can specify different fields for normal and bulk check-ins using the Check-In Listview options. The settings for bulk check-in also apply to the Receive Shipment workform available from the Acquisitions menu.

See the following topics:

- [“Setting Up the Check Out Workform”](#) on page 162
- [“Setting Up the Check In Workform”](#) on page 165

Setting Up the Check Out Workform

You can customize the Check Out workform so that only the patron and item information needed by your staff is displayed. Patron data fields are displayed in the workform header. Item data is displayed in the columns of the item list view.



1-2-3

Set patron data fields for the Check Out workform

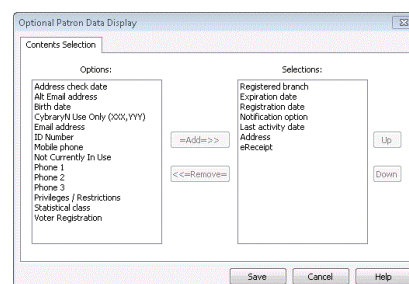
Follow these steps to set which optional patron data fields appear, and the order in which they appear, in the header of the Check Out workform.

Note:

You can set these options at the system, library, or branch level. The settings you make here also control the patron data displayed in the header of the Patron Status workform.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Check-out: Optional patron data**.

The Optional Patron Data Display dialog box appears.



3. To display a field in the Check Out workform header, select the field in the **Options** list and click **Add**. The options include the user-defined fields set up for your system.

The field is placed in the **Selections** list.

Note:

If you select **eReceipt**, the field will be displayed regardless of whether you have enabled eReceipts for this organization. If eReceipts are enabled and you later decide to disable them, remember to remove the eReceipt option from the Check Out workform header. For more information about eReceipts, see "[Setting Up eReceipts](#)" on page 190.

4. To move a field higher or lower in the workform header, select the field in the **Selections** list, and click **Up** or **Down**.
5. To remove a field from the workform header, select the field in the **Selections** list, and click **Remove**.

The field is placed in the **Options** list.

6. Click **OK** on the dialog box.

The Administration Explorer appears.

7. Select **File, Save**.

1-2-3

Set item data fields for the Check Out workform

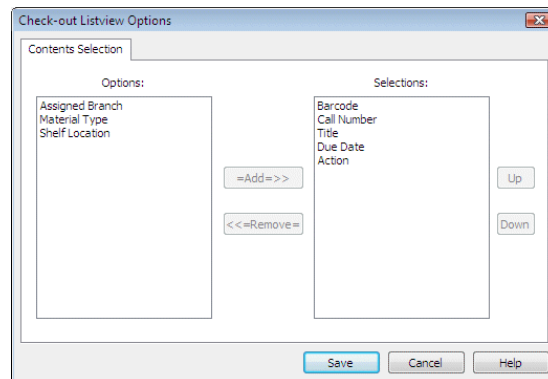
Follow these steps to set which item information appears, and the order in which it appears, in the list view of the Check Out workform.

Note:

You can set these options at the system, library, or branch level.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Check-out: Listview options**.

The Check-out Listview Options dialog box appears.



3. To display a field in the item list view on the Check Out workform, select the field in the **Options** list and click **Add**.

The field is placed in the **Selections** list, and will be displayed as a data column in the list view.

Note:

For serials, the title field includes issue information.

4. To move a column to the left or right in the workform list view, select the field in the **Selections** list, and click **Up** (left) or **Down** (right).
5. To remove a field from the list view, select the field in the **Selections** list, and click **Remove**.

The field is placed in the **Options** list.

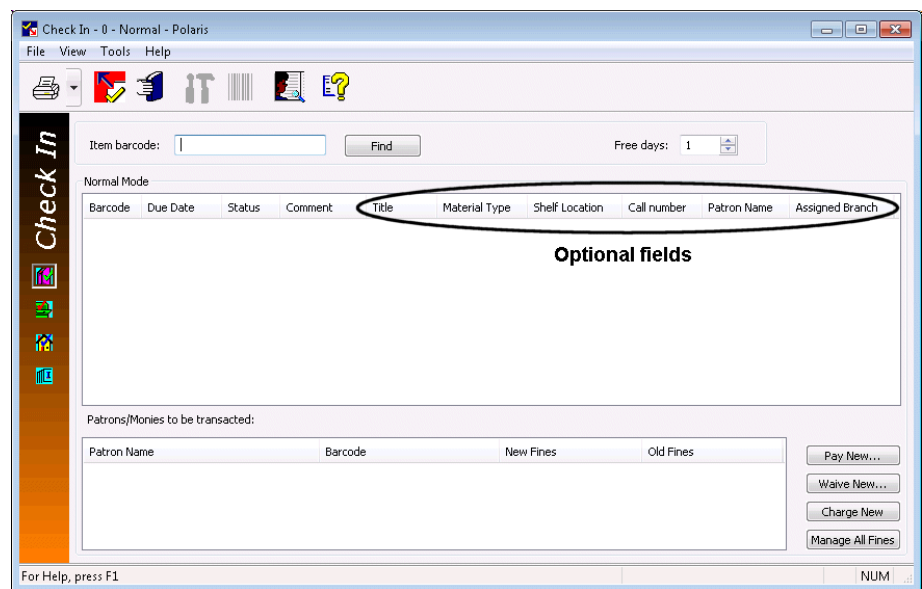
6. Click **OK** on the dialog box.
The Administration Explorer appears.
7. Select **File, Save**.

Setting Up the Check In Workform

Use the Patron Services parameter **Check-in: Listview options** to customize the Check In workform so that only the patron and item information needed by your staff displays in the workform. You can specify different fields for normal and bulk check-in.

Note:

If your library sends enriched EDI orders using Polaris Acquisitions and receives and checks in shipments of shelf-ready barcoded materials, your settings for bulk check-in are also used for the Check-In Shelf-Ready Materials workform. See ["Checking In Shelf-Ready Items"](#) in the *Polaris Patron Services Guide 4.1R2*.



1-2-3

Set Check In list view fields for patron and item data

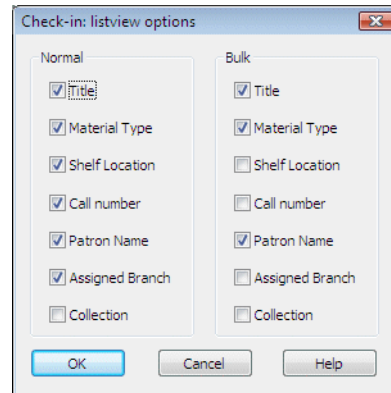
Follow these steps to specify the information that appears in the list view of the Check In workform.

Note:

You can set these options at the system, library, or branch level.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Check-in: Listview options**.

The Check-in listview options dialog box appears.



3. In the Normal column, select the fields (**Title**, **Material Type**, **Call Number**, **Shelf Location**, **Patron Name**, **Assigned Branch**, **Collection**) to display for normal check-in.

The selected fields will be displayed as data columns in the Check In workform list view for normal check-in. The title field includes issue information for serials.

Note:

Select **Assigned Branch** if you allow circulation staff to change an item's barcode, circulation status, or shelf location from the Check In Workform. These operations can be performed only when an item's assigned branch is the same as the workstation's logged-in branch, so it is useful to know the assigned branches of the items in the Check In list view.

4. In the Bulk column, select the fields (**Title**, **Material Type**, **Call Number**, **Shelf Location**, **Patron Name**, **Assigned Branch**, **Collection**) to display for bulk check-in.

The selected fields will be displayed as data columns in the Check In workform list view for bulk check-in.

These settings (except **Patron Name**) are also used in the Check-In Shelf-Ready Materials workform if your library sends Enriched EDI orders using Polaris Acquisitions and receives and checks in shipments of shelf-ready barcoded materials. See "[Checking In Shelf-Ready Items](#)" in the *Polaris Patron Services Guide 4.1R2*.

5. Click **OK** on the dialog box.
The Administration Explorer appears.
6. Select **File, Save**.

Setting Up Circulation Receipts



Polaris provides a number of printed receipts that you can configure to suit your library's policies. You can also enable eReceipts, so patrons can receive check-out, renewal, and fine receipts by e-mail or text message.

See the following topics:

- [“Setting Up Printed Receipts”](#) on page 168
- [“Epson® ReStick™ Printers - Hold and In-Transit Slips”](#) on page 188
- [“Setting Up eReceipts”](#) on page 190

Setting Up Printed Receipts

Polaris provides the following printed circulation receipts and slips:

- **Check-out/renewal receipt** - Lists the items checked out or renewed for a patron during a circulation session. For set-up information, see [“Set check-out receipt options”](#) on page 170.
- **Items Out receipt** - Printed from the Patron Status workform - Items Out view, this receipt lists all the items a patron currently has checked out. For set-up information, see [“Set Items Out receipt options”](#) on page 172.
- **Check-in receipt** - Lists the items checked in for a patron or group of patrons. If items are selected from multiple patrons, the items are grouped by patrons, and three blank lines are added at the end of each group. If auto-cut receipt printing is enabled, the receipt is cut at the end of each patron’s group of items. (Items with no patron information, for example those that went from In to In at check in, are also grouped together and separated from patron items.) For set-up information, see [“Set check-in receipt options”](#) on page 173.
- **Fine receipt** - Lists the fines and fees paid or waived for overdue items, replacement items, and other fees for a patron. For set-up information, see [“Set fine receipt options”](#) on page 174.
- **Hold slip** - Identifies a held item and the patron for whom the item is being held. Four types of hold slips are available:
 - **Default hold slip** - A hold slip prints automatically when an item’s status becomes **Held** as a result of a circulation transaction (for example, the item is checked in). Libraries typically place the hold slip with the held material for identification purposes. The slip also prints when an ILL item is received on the Request Manager workform - ILL Requests view. For set-up information, see [“Set hold slip options”](#) on page 175.
 - **Hold call slip** - For libraries that call their patrons for held items. It includes extended information and is laid out so that it can be folded to expose the title when placed in a book, with all the necessary patron information located below the fold. See [“Enable hold call slips”](#) on page 177.
 - **Hold/ILL pick-up slip** - For libraries that allow patrons to pick up their own held items. This slip is inserted in the book so that the patron’s name (in a specified format) and the pick-up date are visible on the shelf. By default, this slip is printed horizontally on the receipt paper, and requires a line mode receipt printer such as a Star® TSP600, Star TSP700, or Dell™ T200. The settings for this slip also apply to an equivalent ILL pickup slip, printed when an interlibrary loan item is received. Vertical printing settings are also available. For set-up information, see [“Set up hold pickup slips”](#) on page 178.

- **In-transit slip** - Prints automatically when an item's status changes to In Transit (because it belongs to another branch) or Transferred (because it will fill a hold and needs to be sent to the pick-up library) during a circulation transaction. You can also choose to print the in-transit slip only when the status changes to Transferred (see [“Set the workstation to print receipts and slips”](#) in the *Polaris Patron Services Guide 4.1R2*). In Polaris Administration, you can choose the information to include on the slip and select the option to combine the in-transit and pickup slips. See [“Set in-transit slip options”](#) on page 182.

Note:

When an item's status changes to Transferred to fill a request, the in-transit slip includes the text **FOR HOLD**. The text does not appear on in-transit slips printed when an item is checked in and just needs to be shipped back to its assigned branch.

In Polaris Administration, you also specify which printers are available for selection from staff client workforms, and you can specify receipt printer control codes for printer options such as bold type, in addition to the set of control codes that Polaris provides for specific receipt printers. See [“Set receipt printer control codes”](#) on page 184.

Important:

You must also set up receipt or slip printing at each staff client workstation that generates receipts or slips. See [“Setting Up Receipt Printing from Workforms”](#) in the *Polaris Patron Services Guide 4.1R2*.

Note:

Polaris also supports hold pickup and in-transit slips printed from Epson ReStick printers. See [“Epson® ReStick™ Printers - Hold and In-Transit Slips”](#) on page 188.

1-2-3

Set check-out receipt options

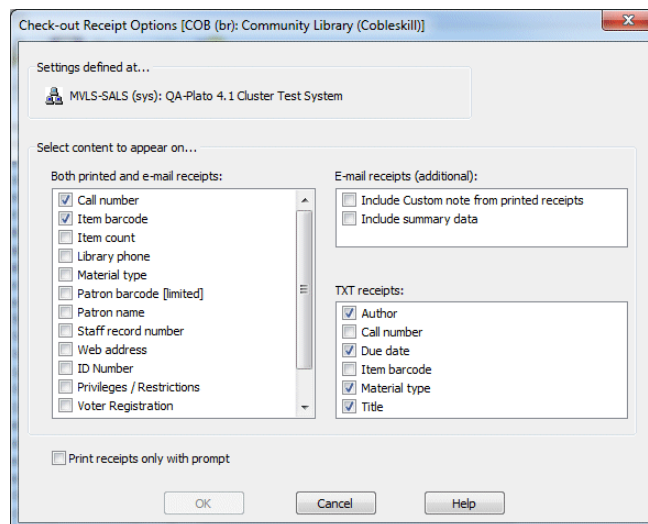
Check-out receipts always display the library name, date/time, type of receipt, item titles, and due dates. You can add any of the following information: call number (item); item bar code; item count (total number of items); library phone number; material type; patron barcode (limited - last 5 digits of the patron barcode); patron name; staff record number (unique identification number from the staff member record); Web address (library URL defined in the organization record); any user-defined fields from the patron record. Follow these steps to select additional information to appear on check-out receipts.

Note:

You can set these options on the system, library, or branch level. Your settings affect receipts generated from the staff client and from Polaris ExpressCheck, but do not affect offline check-out receipts. The offline information is fixed and cannot be changed in Polaris Administration.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Check-out: Receipt options**.

The Check-out Receipt Options dialog box appears.



3. To include a field in the check-out receipt, select the field in the **Both printed and e-mail receipts** list. User-defined fields are grouped together at the end of the list.

Note:

For more information about setting up eReceipts (e-mail and TXT receipts), see ["Setting Up eReceipts"](#) on page 190.

4. If you want to print a receipt only when the patron requests one, select (check) **Print receipts only with prompt**. (If the option is not checked, no prompt is displayed and the receipt is always printed when check-out receipts are enabled for the workform.) This option applies only to online staff client operations; a checkout receipt with limited data is always printed during offline circulation.

Note:

You can enable e-mail or text message check-out receipts for patrons who prefer these to printed receipts. See ["Setting Up eReceipts"](#) on page 190.

This option can reduce unnecessary printing. When the **Check out receipt option** is checked on the workform **Tools, Options** menu and the option to prompt for the optional check-out receipt has been enabled for the workstation branch, the prompt to print a receipt is displayed when the **Enter** key is pressed to signal the end of the check-out transaction. The prompt to print the receipt is displayed during the following processes: normal and reserve item check out from the staff client Check Out workform; RFID check out; media dispenser unit check out; offline check out.

Note:

The receipt prompt is not displayed for renewals from the Patron Status workform - Items Out view. However, staff can optionally print a "receipt" from this view by suppressing check-out receipt printing from the workform **Tools** options, and then printing receipts on demand by printing the Items Out list. (**CTRL+ALT+P**). You can specify the information included in the printed version of the Items Out list. See ["Set Items Out receipt options"](#) on page 172.

5. Click **OK** on the dialog box.

Important:

At each staff client workstation, you must enable the receipt from each workform that generates the receipt. See ["Setting Up Receipt Printing from Workforms"](#) in the *Polaris Patron Services Guide 4.1R2*.

Related Information

- **E-Receipts** - Patrons can receive check-out and renewal receipts by e-mail or text message. See ["Setting Up eReceipts"](#) on page 190.
- **Custom note text** - You can specify custom note text to appear on check-out, Items Out, and fine receipts. For details, see ["Setting Up Receipt Printing from Workforms"](#) in the *Polaris Patron Services Guide 4.1R2*.

1-2-3

Set Items Out receipt options

Staff members can print a patron's Items Out list from the Patron Status workform - Items Out view. This "receipt" lists all the items a patron currently has checked out. The header of the Items Out list always includes the library name and date/time. You can include the following optional header data: author, call number, collection, due date, any custom note set for printed receipts, item's assigned branch, item barcode, item count, library phone, material type, limited patron barcode, patron name, renewals left, title, library Web address, and user-defined fields.

Note:

If you choose to print check-out receipts only when prompted (see "[Set check-out receipt options](#)" on page 170), the receipt prompt is not displayed for renewals from the Patron Status workform - Items Out view. However, staff can optionally print the Items Out "receipt" from this view by suppressing check-out receipt printing from the workform **Tools** options, and then printing receipts on demand by printing the Items Out list (CTRL+ALT+P).

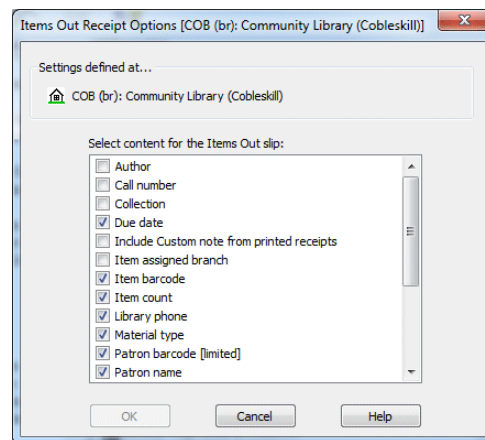
Follow these steps to select additional information to appear on the Items Out list.

Note:

You can set these options on the system, library, or branch level. The system uses the settings for the workstation's log-on branch.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Items out receipt options**.

The Items Out Receipt Options dialog box appears.



3. To include a field in the Items Out receipt, select the field in the **Select content** list. User-defined fields are grouped together at the end of the list.
4. Click **OK**.

Related Information

Custom note text - You can specify custom note text to appear on check-out, Items Out, and fine receipts. For details, see [“Setting Up Receipt Printing from Workforms”](#) in the *Polaris Patron Services Guide 4.1R2*.

1-2-3

Set check-in receipt options

Check-in receipts can be printed from the Check In workform - Normal view and Check In workform - Bulk view. They include the item barcode, title, author, material type, call number, and patron's limited barcode. The following information fields are also available for use: author, due date, item's assigned branch, full patron barcode, patron name, status. You can set these options on the system, library, or branch level.

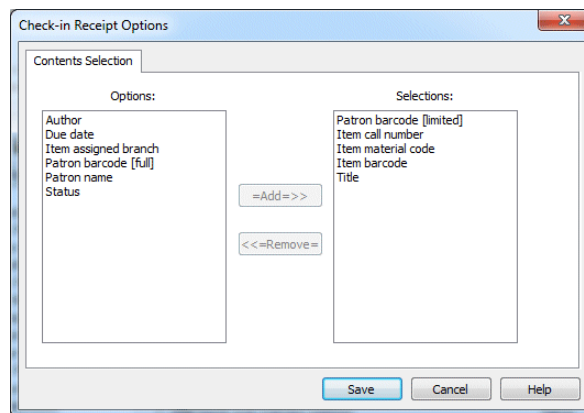
Note:

The Check In workform list view can also be printed on a receipt printer.

Follow these steps to set the information that appears on check-in receipts.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Check-in: Receipt options**.

The Check-in Receipt Options dialog box appears.



3. To include a field in the check-in receipt, select the field in the **Options** list and click **Add**. The field is placed in the **Selections** list.
4. To remove a field from the check-in receipt, select the field in the **Selections** list, and click **Remove**. The field is placed in the **Options** list.
To print check-in receipts, at least one field must be listed in Selections.
5. Click **Save** on the dialog box.

1-2-3

Set fine receipt options

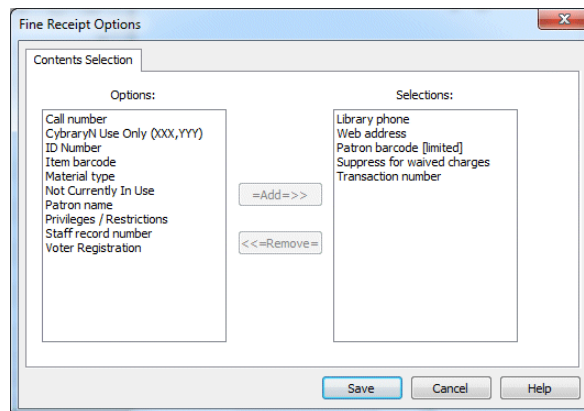
Fine receipts always display the library name, date/time, type of receipt, title, reason (from the charge transaction), the amount paid or waived, and total charges. You can add any of the following information: call number (associated item); item barcode; material type; patron name; library phone number; Web address (library URL); patron name; last 5 digits of the patron barcode; staff record number (unique identification number from the staff member record); any user-defined field from the patron record; transaction number (unique identifying number of the transaction). You can also set Polaris to print duplicate fine receipts if your audit policies require them. Follow these steps to select additional information to appear on fine receipts and enable duplicate receipts if required.

Note:

You can set these options at the system, library, or branch level.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Fine receipt options**.

The Fine Receipt Options dialog box appears.



3. To print a field on the fine receipt, select the field in the **Options** list and click **Add**. The field is placed in the **Selections** list. (To remove a field from the fine receipt, select the field in the **Selections** list, and click **Remove**. The field is placed in the **Options** list.)

Note:

The options include any user-defined fields. If you add **Suppress for waived charges**, the fine receipt is not printed for only a waived transaction. However, if a transaction contains both payments and waives, the receipt is printed regardless of this setting.

4. Click **Save** on the dialog box.

5. To enable duplicate printed fine receipts for the organization, set the Patron Services parameter **Fine receipts: Print duplicate receipt** to **Yes**.

Note:

At each staff client workstation, you must enable the receipt from each workform that generates the receipt. See [“Setting Up Receipt Printing from Workforms”](#) in the *Polaris Patron Services Guide 4.1R2*.

Related Information

- **E-Receipts** - Patrons can receive fine receipts by e-mail or text message. See [“Setting Up eReceipts”](#) on page 190.
- **Custom note text** - You can specify custom note text to appear on check-out, Items Out, and fine receipts. For details, see [“Setting Up Receipt Printing from Workforms”](#) in the *Polaris Patron Services Guide 4.1R2*.

1-2-3

Set hold slip options

Hold slips always display pickup location, date the item was trapped for the hold, held till (unclaimed) date, item title, item call number, item barcode, any display notes (in bold), and item’s assigned branch. You can add any of these options to print on a hold slip:

- Patron name (if selected, this is printed in bold at the top of the slip)
- Last 5 digits of the patron barcode (**Limited patron barcode**)
- Patron phone (all phone numbers from the patron record)
- Patron address (home address from the patron record if available, otherwise the first available address in the patron record)
- Notification method
- Patron e-mail address
- Any user-defined fields from the patron record

Note:

If you add any user-defined fields and enable hold call slips (see [“Enable hold call slips”](#) on page 177), the fields you specified appear on the hold call slip.

The illustration shows an example.

Tester, Louise A	
03434	
Unclaim : 3/21/2010	
Held date	: 12/10/2009
Pickup location	: Schenectady County Public Library - Central
Title	: Ceramic tile: walls. [videorecording]
Call number	: VC 643.7 CERA tape/bklt
Item barcode	: 0000900176207
Assigned branch	: Waterford Public Library
Address	: 4 Main St AMSTERDAM NY 12010
Notes: Hold Display Note	

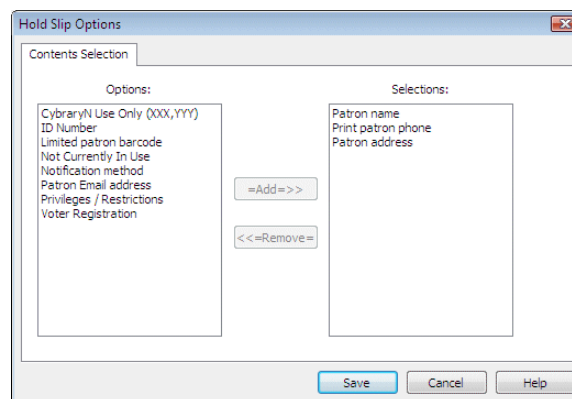
Follow these steps to select additional information to appear on hold slips.

Note:

You can set hold slip, hold call slip, and hold pickup slip parameters on the system, library, or branch level. For details about these slips, see ["Setting Up Circulation Receipts"](#) on page 167.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Hold slip options**.

The Hold Slip Options dialog box appears.



3. To print additional fields on the hold slip, select the field in the **Options** list and click **Add**. The field is placed in the **Selections** list. (To remove a field from the hold slip, select the field in the **Selections** list, and click **Remove**. The field is placed in the **Options** list.)
4. Click **Save** on the dialog box.

1-2-3

Enable hold call slips

Hold call slips are specially-formatted hold slips that contain additional title information for libraries that manually call patrons. For details, see [“Setting Up Printed Receipts”](#) on page 168. If you enable hold call slips, from any specific workform, the hold slip, the hold call slip, or the hold pickup slip can be selected as the default hold “receipt,” but not more than one per workform. Follow these steps to enable the hold call slip.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Holds call slip: enable**, and select **Yes**.

Note:

If you specified user-defined fields for hold slips (see [“Set hold slip options”](#) on page 175), these appear on the hold call slip. All the other fields are fixed and cannot be customized in Polaris Administration.

The illustration shows an example.

Hold Call Slip	
Title	: Christmas Eve: 13 stories. —
Author	: Brennan, Maeve.
Material	: Books
Call number	: Fic BRE
Barcode	: 33614001222560
Held at	: Tualatin Public Library
Date held	: 09/07/2008
Hold until	: 09/17/2008
Note:	
Other items held:	
Held for:	
Patron	: FREDERICK, STEVE
Barcode	: 45955
Phone Number	: 315 634-8492;
Address	: 8865 SW B2ND AVE
	PORTLAND
	OR 97223
Driver's license number	: 5663440 ODL
Contact name/Phone number	: 503-350-6807 - ADC
Notification: Mailing Address	

3. Select **File, Save**.

1-2-3

Set up hold pickup slips

Hold pickup slips are formatted for libraries that allow patrons to pick up their own held items. These slips require a line mode receipt printer. You can also set up combined in-transit and hold pickup slips. See [“Set in-transit slip options”](#) on page 182.

Follow these steps to set up hold pickup slips.

Note:

Your settings for the holds pickup slip also apply to the equivalent ILL pickup slip, which is printed when an interlibrary loan item is received.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Hold pickup slip options**.

The Hold Pickup Slip Options dialog box opens.

3. Select (check) **Enable Pickup Slip**.
4. Specify the patron identification to appear on the slip:
 - Select (check) **Print full patron name** to print the entire name in this format: Last name (comma), First name (no comma) and Middle initial. Example: **Smith John T.**
 - Or select (check) **Print x characters of patron last name**, and set the number of characters to print the name in this format: First x number of characters of the last name (no comma) and the first initial of first name. Example: **Smit J**

If the control is set to print only 1 character of the last name, only the first character of the last name is printed, not the first or middle initial.

If you chose to include the patron's name or limited characters, it is printed in bold, large characters at the top of the slip. If you do not check either option, no name appears on the slip.

Note:

Printer limitations restrict the name to approximately 38 characters, depending on the width of the characters and the printer model. Very long names may be cut off even if you specified the full patron name. If you set the number of characters to 1, only the first character of the last name is printed.

- To include a patron barcode on the slip, select (check) **Print x digits of the patron barcode**, and specify the number of digits to print, counting to the left from the last digit of the barcode.

Note:

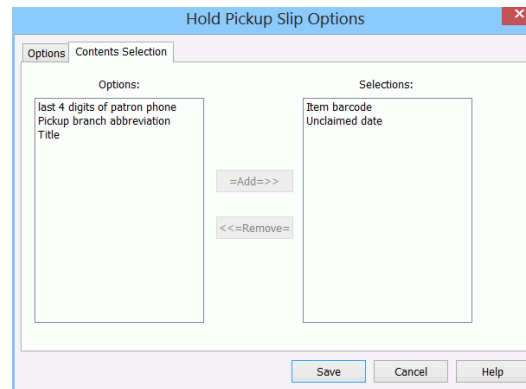
Print x digits of the patron barcode *must* be selected (checked) at the pickup branch to allow for the patron's barcode to print on the slip. See ["Set in-transit slip options"](#) on page 182.

- To print the barcode in large print, select (check) **Large print**.
5. In the **Number of blank trailing lines** box, specify the number of blank lines to insert on the right side of horizontal slips or the bottom of vertical slips.

This setting determines the length of the blank "tail" that is inserted into the book.

6. Select a printing orientation for the slip:
 - **Horizontal** (default) - The hold pickup slip is inserted in the material, exposing the patron name and pickup date. The material is shelved so that the slip extends horizontally from the material.
 - Select a number in the **trailing blank** spin control to specify the number of blank lines to insert on the right side or horizontal slips or the bottom of vertical slips.
 - **Vertical** - The hold pickup slip is a wrapper that is typically taped to the spine of the material. The pickup date is printed horizontally at the top and the patron's name is printed vertically down the slip. Any additional content is printed in small type under the pickup date.
 - **Tag** - The hold pickup slip is inserted into the material. When the slip is inserted, the patron name and pickup date are exposed at the top of the slip, printed horizontally, and the "tail" of the slip is inside the material. The material is shelved so that the slip extends above the material. Any additional content is printed in small type under the item barcode.
7. To print additional fields on the hold pickup slip, click the **Contents Selection** tab.

The Contents Selection tab displays the available options in the left column of the dialog box, and the selected options in the right column.



To add a field to be printed on hold pickup slips, select it in the **Options** column and click **Add** to add it to the **Selections** column. To remove a field, select it in the **Selections** column and click **Remove**.

- **last 4 digits of patron phone** - You can add the last four digits of the patron's phone number after the patron's name, in the same large font. The system uses the last four consecutive numeric characters of the **Phone 1** field in the patron record. If this field is blank, or if four consecutive numeric characters cannot be found, no number is printed.

Examples:

315 634-4512 ext 123

634-4512 WORK

In both cases, the system sees alpha characters in the last 4 characters and moves left until it identifies 4 consecutive numbers. The slip will print **4512**.

634-4512 ex 1234

The system identifies and prints **1234** because there are 4 consecutive numbers.

451 ex.123

The system cannot identify 4 consecutive numbers. No numbers will be printed on the slip.

- **Pickup branch abbreviation** - When selected, the pickup branch abbreviation is printed on all holds pickup slips, and on combination in-transit/holds pickup slips, regardless of format, at the top of the slip. On horizontal slips, the branch abbreviation is printed above the patron name in bold capital letters the same font size as the date. On vertical slips, it is printed above the "Pickup by" date, also in bold capital letters the same size as the date. On tag slips, it is printed above the patron name in the same size font as the "Pickup by" date.
- **Title** - When selected, the title is printed on the hold pickup slips.
- **Item barcode** - The full item barcode is printed.

Note:

Libraries that process items for holds centrally, sorting held items by pickup branch, may want to select the pickup branch abbreviation option to print at the top of the holds pickup slip for ease in sorting.

Unclaimed date - The **Unclaimed date** is the date to pull the item from the shelf if it has not been picked up. The date is based on a time period defined by the pickup branch.

Note:

If your library is using a combined in-transit/hold pickup slip, this date is not available because the slip is printed when the item goes in-transit.

8. Click **OK** on the dialog box.

The Administration Explorer (Parameters - Patron Services) appears.

Note:

At each staff client workstation, you must enable the slip from each workflow that generates the slip. See ["Setting Up Receipt Printing from Workforms"](#) in the *Polaris Patron Services Guide 4.1R2*.

1-2-3

Set in-transit slip options

Follow these steps to set information options for in-transit, in-transit for hold slips, or combination in-transit and pickup slips.

Note:

When a library uses a combined in-transit slip, the library's in-transit settings determine how information displays on the slip. For example, when an item is scanned at the original library, a combined slip prints containing the pickup branch name and the library name, in a format set per the original library's in-transit settings. The patron name and other contents for the pickup slip are determined per the pickup branch's setting.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **In-transit slip options**.

The In-Transit Slip Options dialog box opens.

3. To include a requesting patron's name on the slip, select (check) **Print patron name on In-transit-hold slip**.
4. To include a requesting patron's barcode on the in-transit for hold slip, select (check) **Print patron barcode on In-transit-hold slip**.

Note:

For the patron's barcode to display on the in-transit for hold slip, the pickup branch *must* have **Print x digits of the patron barcode** selected (checked) in **Hold Pickup Slip Options**. See ["Set hold slip options"](#) on page 175.

5. (Optional) Select **Print library full name**, **Print library abbreviation**, or both to print the parent library of the destination branch.

These options apply to all in-transit slips.

6. For the destination branch name, select **Print branch full name** or **Print branch abbreviation**.

This option applies to all in-transit slips. You must select one option.

7. To control the length of the in-transit slip, select or type the number (0-999) of trailing blank lines to add to the slip.
8. Click **OK**.

Note:

At each staff client workstation, you must enable the slip from each workform that generates the slip. See [“Setting Up Receipt Printing from Workforms”](#) in the *Polaris Patron Services Guide 4.1R2*.

Related Information

Printing in-transit slips only for holds - See [“Set the workstation to print receipts and slips”](#) in the *Polaris Patron Services Guide 4.1R2*.

1-2-3

Set receipt printer control codes

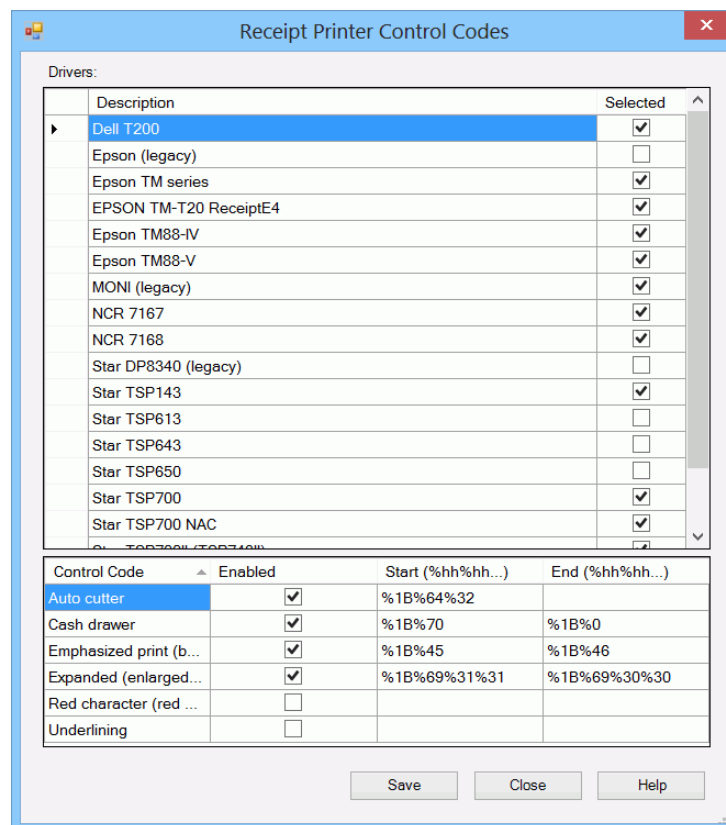
Follow these steps to enable large print, bold print, red print, underlining, auto-cutting, or cash drawer for standard receipt printers, or to add other kinds of receipt printers to your system.

Note:

Install the appropriate printer drivers on the staff client workstations that use receipt printers.

1. In the Administration Explorer tree view, open the **Profiles** folder at the system level, and select the **Staff Client** tabbed page in the details view.
2. Double-click **Receipt printer control codes**.

The Receipt Printer Control Codes dialog box appears.



3. If you use receipt printers already listed in the **Drivers** list, follow these steps to set optional features for them:

Note:

Repeat these steps for each printer in your system.

- a) Select the printer in the **Drivers** list.
- b) Select the check box for each feature (such as expanded, bold, red, auto-cut, cash drawer) you want to enable for that printer.

A specific printer may not support all these features. If a feature is not supported, the **Start** and **End** code fields are blank.

Note:

The **Expanded** setting affects in-transit and hold slips. On the in-transit slip, the destination branch's name is printed in a font that is twice as large as the font on the rest of the slip. On the hold slip, the patron's name and the unclaimed date are printed in the large font. Although you set this option for specific receipt printers, if you choose to print these slips on a page printer, the font is also enlarged.

- c) To list the printer for selection in Polaris workforms, be sure the **Selected** option is checked.
 - d) Click **Save**.
4. To add a receipt printer and enable special features for it, follow these steps:

Note:

You can add more than one printer. Repeat these steps for each printer you want to add.

- a) Scroll the **Drivers** list to the last blank field, which is marked by an asterisk.

Drivers:

Description	Selected
EPSON TM-T20 ReceiptE4	☒
Epson TM88-IV	☒
Epson TM88-V	☒
MONI (legacy)	☒
NCR 7167	☒
NCR 7168	☒
Star DP8340 (legacy)	☐
Star TSP143	☒
Star TSP613	☐
Star TSP643	☐
Star TSP650	☐
Star TSP700	☒
Star TSP700 NAC	☒
Star TSP700II (TSP743II)	☒
Star TSP743III	☒
*	☐

Control Code	Enabled	Start (%hh%hh...)	End (%hh%hh...)
Auto cutter	☒	%1B%64%32	
Cash drawer	☒	%1B%70	%1B%0
Emphasized print (b...)	☒	%1B%45	%1B%46
Expanded (enlarged...)	☒	%1B%69%31%31	%1B%69%30%30
Red character (red ...)	☐		
Underlining	☐		

- b) Select the blank field and type the printer name in the field.
- c) Click **Save**.
- d) Select your printer in the **Drivers** list, and select the check box for each feature you want to enable.

Your printer may not support all features.

- e) For each enabled feature, select the **Start** and **End** code fields, and type the appropriate codes in the format shown.

See your printer documentation for the correct codes. Some models may require only a start code for some features.

Note:

If you select **Cash drawer**, the receipt printer must be connected to a cash drawer via an RJ11 connector that signals the cash drawer to open automatically when a receipt is printed. You can also set a staff client profile at the system, library, or branch level to open the cash drawer when a receipt is printed only if the payment was a cash payment. See ["Set option to open the cash drawer only for cash fine receipts"](#) on page 187.

- f) To list the printer for selection in Polaris workforms, select (check) the **Selected** option.

- g) Click **Save**.

- 5. To suppress an unused printer from the receipt printer list in Polaris workforms, clear (uncheck) the **Selected** check box for the printer.

If you change multiple printers, you must click **Save** after each printer change.

- 6. Click **Close**.

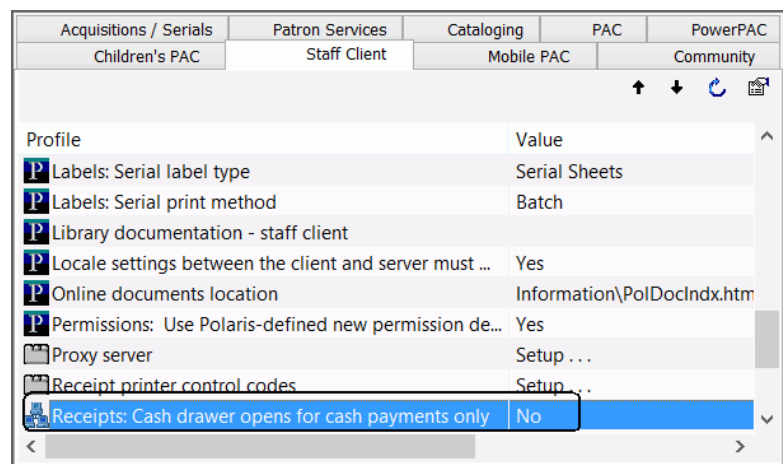
1-2-3

Set option to open the cash drawer only for cash fine receipts

The receipt printer must be set up in Polaris Administration at the system level to open the cash drawer automatically when a receipt is printed. See [“Set receipt printer control codes”](#) on page 184. You can set an additional option at the system, library, or branch level that opens the cash drawer only when a fine receipt is printed and the payment method is cash, check, collection agency, or voucher. Fine receipts are still printed for credit card payments, but the cash drawer does not open.

Follow these steps to set the option to open the cash drawer only when fine receipts are printed for cash payments.

1. In the Administration Explorer tree view, open the **Profiles** folder at the system, library, or branch level, and select the **Staff Client** tabbed page in the details view.
2. Double-click **Receipts: Cash drawer opens for cash payments only**, and select **Yes**. The default is **No**.



If the receipt printer is set up to open the cash drawer automatically when a payment is made, and the **Receipts: Cash drawer opens for cash payments only** is set to **Yes** for the organization at which the payment is made, the cash drawer will open only for the following types of payments:

- Cash
- Check
- Voucher
- Collection Agency

Epson® ReStick™ Printers - Hold and In-Transit Slips

Polaris can export hold pickup slip (“wrapper”) and in-transit slip data to Epson ReStick printers using the Epson Intelligent Label Service (ILS). This software allows the user to configure printed receipt formatting (font, orientation, data printed, etc.). It also allows the library to direct output to one or more specified printers. To support the integration, Polaris receipt output for these types of slips is converted to ANSI RAW instead of Unicode RAW, a header is added to the slip, and each data element is labeled for use by the Epson ILS. (The data labels are not printed.)

Note:

If the option to use the Epson ILS is selected, the Polaris Administration configuration options for in-transit and hold pick-up slips do not affect the Epson ReStick printer output. All other receipts are printed according to the configuration options set in Polaris Administration.

To enable receipt data export to the Epson ILS in Polaris Administration, set the Staff Client profile **Receipts: Support Epson ILS** to **Yes**. The profile is available at the system, library, branch, and workstation levels. When the profile is set to **Yes** for the workstation, *only hold pick-up and in-transit slips are printed on the Epson ReStick printer*. All other receipts (such as check-out receipts) are directed to other, non-ReStick printers, and are printed according to the configuration options set in Polaris Administration (see [“Setting Up Printed Receipts”](#) on page 168). If the profile is set to **Yes** but a different printer is chosen for the workstation, all circulation receipts and slips can be printed according to the configuration options set in Polaris Administration. However, hold and in-transit receipts will print the headers as they have been configured for Epson ILS, for example, **++++ Hold-----**. See below. The header cannot be edited in Polaris.

Note:

When the profile is set to **No**, no slips can be printed on the Epson ReStick printer. All circulation receipts and slips can be printed on other types of printers according to the configuration options set in Polaris Administration. See [“Setting Up Printed Receipts”](#) on page 168.

When the profile is set to **Yes** and a hold wrapper or in-transit slip is printed, all the data associated with the receipt is sent to the Epson ILS, which configures which data prints, font, format, and orientation.

Note:

CJK, Arabic and other non-Western characters are not printed correctly.

For hold pickup slips, the following data is exported to the Epson ILS:

Note:

The Epson ILS controls which data is actually printed.

- Header text: +-----HOLD----- [cannot be edited]
- Data field labels:
 - Name - The patron name, Last, First MI. Referred to as User Name by the Epson ILS.
 - Lib - Lib abbreviation
 - Phone - Last 4 digits of patron phone
 - Patron barcode - Patron barcode
 - Pick-up by - Pickup date. Format: mm/dd/yyyy
 - Item barcode - Item barcode
 - Title - Item title

For in-transit slips, the following data is exported to the Epson ILS:

Note:

The Epson ILS controls which data is actually printed.

- Header text - +-----IN-TRANSIT+----- [cannot be edited]
- Data field labels:
 - Name - The patron name, Last, First MI
 - Pbarcode - Patron barcode
 - LibraryName - Library name. Referred to as Location by some Epson clients.
 - LibraryAbbrev - Library abbreviation
 - BranchName - location [lower case is required]
 - BranchAbbrev - location [lower case is required]
 - From - Library name or abbreviation
 - Hold for
 - Title
 - Material type
 - Call number
 - Item Barcode
 - Assigned Branch

The following options for Polaris receipts do not apply to data exported to the Epson ILS:

- Trailing blank lines
- Orientation
- Large print

Setting Up eReceipts

You can send eReceipts (e-mail and/or text message receipts) to patrons who prefer either of these options. eReceipts are available for check-out, renewal, and fine receipts from the staff client, and for renewals from PAC, check-out and renewals from Polaris ExpressCheck, and renewals from Polaris Phone Attendant (inbound telephony). No overnight processing is required, so these receipts are sent within a few moments of the transaction. All eReceipts are sent in plain text format. One checked out or renewed item is listed per text message (TXT) receipt to limit the length of the message.

Note:

eReceipts are not sent for offline staff client transactions.

Patron Record Settings for eReceipts

Staff members set the **eReceipt option** on the Patron Registration workform - Addresses view to specify the patron's preference for e-mail receipts, TXT message receipts, or both (**All**). The option is available if eReceipts have been enabled for the patron's branch (see [“Set up eReceipts”](#) on page 194).

The screenshot shows the 'Patron Registration - 357291 - Addresses - Polaris' window. The 'eReceipt option' dropdown menu is open, showing options: (None), Email Address, TXT Messaging, and <All>. The 'eReceipt option' is circled in red. The window also displays fields for Barcode, Last name, First name, Middle name, Title, Suffix, Registered at, Patron code, Expiration, Term, Date, Addresses, Phone Numbers, Address Check, Notices/bills address, Notification option, Additional TXT notice, Email address, Phone 1, Phone 2, Phone 3, FAX number, and Alt Email address.

You can set these options as default selections for normal and express patron registration. For more information about setting registration default values, see [“Setting Patron Registration Defaults and Requirements”](#) on page 41 and [“Setting Express Registration Defaults and Requirements”](#) on page 46.

If a patron record specifies eReceipts, you can also choose to include the setting in the optional patron data that is displayed in the header area of the Check Out and Patron Status workforms. For more information about selecting data to be displayed in these header areas, see [“Setting Up the Check Out Workform”](#) on page 162.

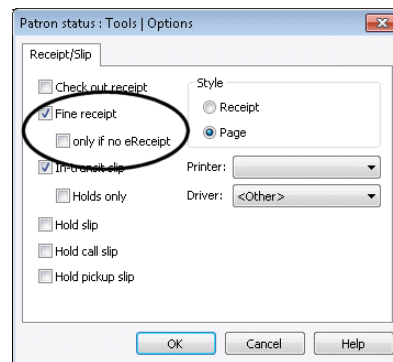
Fine eReceipts

Patrons receive e-mail or TXT receipts for fine payments if eReceipt options have been enabled for both the transacting workstation’s branch and the patron’s branch, and the patron record is set to receive e-mail receipts, TXT receipts, or both.

Note:

EReceipt features do not apply to credit card payments because e-mail receipts are sent for these payments as a separate process.

Staff members can print a fine receipt even if the patron receives an eReceipt. The **Tools, Options** menu on any workform where staff members can take fine payments offers a fine receipt option: **only if no eReceipt**.



When eReceipts are enabled and **Fine receipt** is checked in the Options dialog box, the option **only if no eReceipt** is available. If the option is not checked, printed receipts are produced in addition to eReceipts for patrons who have opted to receive eReceipts. If **only if no eReceipt** is checked, fine receipts are printed only when the patron does not receive eReceipts.

Note:

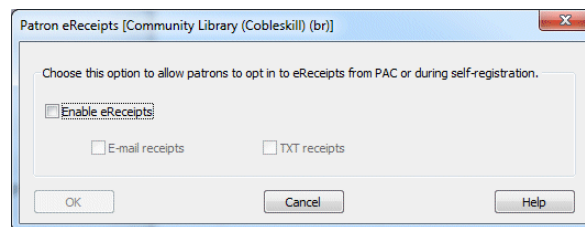
The Options dialog box settings affect fine receipt *printing* only. A patron who has opted to receive eReceipts will always receive eReceipts for fines, regardless of these settings. For more information about setting up workstations for receipt printing, see [“Setting Up Receipt Printing from Workforms”](#) in the *Polaris Patron Services Guide 4.1R2*.

Waive eReceipts

An eReceipt is sent for waived charges if all the conditions for sending a fine eReceipt are met, and if the **Suppress for waived charges** option (Patron Services parameter - **Fine receipt options**) is not selected for the workstation's branch. A receipt for waivers is printed in addition to the eReceipt if all the conditions for printing a fine receipt are met (see "[Fine eReceipts](#)" on page 191) and if the **Suppress for waived charges** option is not selected for the workstation branch.

eReceipt Options in Polaris PowerPAC and Mobile PAC

If the patron's registered branch has enabled eReceipts (see "[Set up eReceipts](#)" on page 194), that organization can also offer the option to receive e-mail receipts, TXT receipts, or both in patron self-registration or account updates from PAC. To enable eReceipt preference options in PAC, use the PAC profile **Patron eReceipts**, available at the system, library, or branch level.



In the PAC, the patron can then select e-mail receipts, TXT receipts, or both, as enabled by the registered branch. The patron will receive eReceipts for renewals from PowerPAC and Mobile PAC if this option has been enabled for the patron's registered branch (see "[Set up eReceipts](#)" on page 194), and check-out and fine eReceipts if *both* the check-out branch and the patron's branch have enabled eReceipts.

Important:

The eReceipt options are available for patron account updates from PAC only if you also allow patrons to update the e-mail address or phone number from PAC. These settings are available in the PAC profile **Patron access options**. See "[Set up online patron account updates](#)" in the *Polaris Public Access Administration Guide 4.1R2*.

Editing eReceipt Content in Polaris Language Editor (WebAdmin)

Your settings for the check-out branch determine the content of e-mail receipts and TXT receipts. For e-mail receipts, the From field is determined by the PAC profile **Email notification: Email address of sender**. The subject line, introduction, and footer text can be modified in Polaris WebAdmin (Language Editor). For TXT receipts, the subject line and footer text can be modified in Polaris WebAdmin.

Note:

Use the Patron Services parameter **Check out receipt options** to specify the optional additional data fields for e-mail receipts and TXT receipts. See ["Set up eReceipts"](#) on page 194.

Polaris WebAdmin includes a **Receipts** "product." Select this product to edit the content of e-mail and TXT receipts.

The table lists the string IDs. For more information about using Polaris WebAdmin, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

Receipt Type	Mnemonic (String ID)	Default Text	Context
E-Mail Check-Out Receipts	RECEIPT_CHECKOUT_EMAIL_SUBJECT	Checked-out from your library	Subject
	RECEIPT_CHECKOUT_EMAIL_INTRO	The following items were checked out by you on [DATE] from [BRANCH]	Introduction
	RECEIPT_EMAIL_FOOTER	Please do not reply to this message.	Footer
E-Mail Renewal Receipts	RECEIPT_RENEWAL_EMAIL_SUBJECT	You renewed library items	Subject
	RECEIPT_RENEWAL_EMAIL_INTRO	Items renewed on [DATE].	Introduction
Text Message Check-Out Receipts	RECEIPT_CHECKOUT_TXT_SUBJECT	Checked-out from your library	Subject
	RECEIPT_TXT_FOOTER	Access your library account for additional information.	Footer
Text Message Renewal Receipts	RECEIPT_RENEWAL_TXT_SUBJECT	You renewed library item	Subject

Logging eReceipts and Reporting Failures

E-mail and TXT receipt messages are logged in the Polaris Transactions database, and failures are included in the **Receipt delivery failure report**. To access this report, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and open the **Circulation** folder in the Polaris Reports window. For a specified time period and organizations (sending branches), the report lists the transactions where an e-mail or TXT receipt failed to be sent for a check-out or renew transaction. For more information, see [“PAC Reports”](#) in the *Polaris Basics Guide 4.1R2*.

1-2-3

Set up eReceipts

Follow these steps to enable eReceipts and specify their content.

1. Confirm that the following e-mail prerequisites are set up for the organization:
 - In Polaris Administration, set the PAC profile **Email notification: Server running SMTP service** for the organization. Use the computer name where the SMTP service is installed.
 - Set up reverse DNS in Active Directory for your network. Reverse DNS is used to authenticate a sender's address with the domain. This step helps ensure your patrons will receive their e-mail receipts. As a security measure, certain Internet service providers block e-mail to their users if they cannot find the sending server.

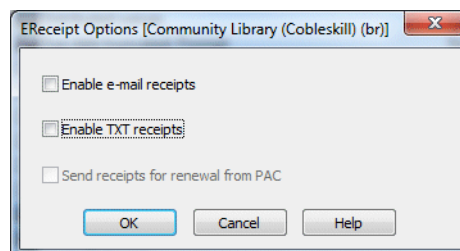
Note:

These settings are also necessary for e-mail notification. See [“Delivering Notices By E-mail”](#) on page 442.

2. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
3. Double-click **EReceipt options**.

The parameter is available at the system, library, or branch level. At check out, eReceipts must be enabled for *both* the patron's branch and the check-out (log-on) branch in order for the patron to receive the check-out eReceipt.

The EReceipt Options dialog box opens.



4. Check **Enable e-mail receipts**, **Enable TXT receipts**, or both.

When at least one option is selected for the patron's branch, the option is available for selection on the patron registration workform (see ["Patron Record Settings for eReceipts"](#) on page 190).

5. To enable renewal eReceipts from PAC, check **Send receipts for renewal from PAC**.

For more information about eReceipt options in PAC, see ["eReceipt Options in Polaris PowerPAC and Mobile PAC"](#) on page 192.

6. Click **OK**.

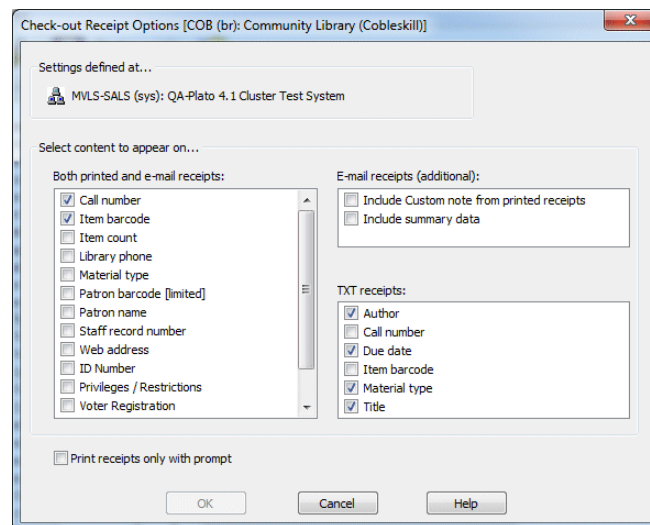
7. Set the optional content for eReceipts:

Note:

Your settings for the check-out branch determine the content of e-mail receipts and TXT receipts.

- a) Double-click the Patron Services parameter **Check out receipt options**.

The Check-out Receipt Options dialog box opens.



Options checked in the left column apply to both printed and e-mail receipts. For more information about printed check-out receipts, see ["Set check-out receipt options"](#) on page 170.

- b) If you want to include additional content for e-mail receipts, check **Include Custom note from printed receipts** and/or **Include summary data** in the **E-Mail receipts (additional)** list.
 - The custom receipt note is set up on the circulation workstation, from the Polaris Shortcut bar. Select **Circulation, Options** from the Polaris Shortcut Bar, and type the text in the Circulation Options dialog box - Receipt Printer Options tabbed page.

- Summary data includes the following patron account information: number of items currently checked out; number of open requests (the total number of Hold requests with a status of Active, Inactive, or Pending, and the number of ILL requests with a status of Active or Inactive); number of items (ILL or Hold) with a status of Held; total amount of unpaid charges.

c) In the TXT receipts list, check the content options for the TXT receipt.

Because text messages must be brief, the set of content options for TXT receipts is separate and more limited than the content options for printed and e-mail receipts.

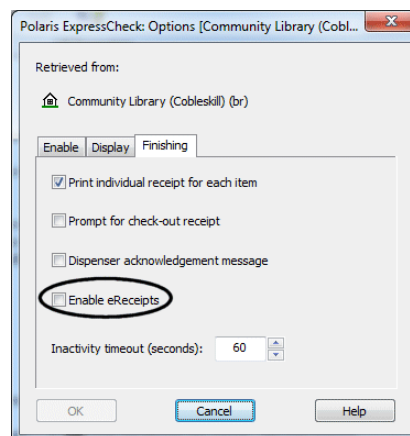
Note:

Subject, introduction, and footer text for eReceipts can be customized in Polaris Language Editor (WebAdmin). See [“Patron Record Settings for eReceipts”](#) on page 190.

d) Click OK.

Related Information

- **Polaris ExpressCheck eReceipts for check out and renewal** - Use the SelfCheck Unit parameter **Polaris ExpressCheck: Options**. Check the **Enable eReceipts** option. Once this option is checked, the patron will receive eReceipts if both the patron's branch and the ExpressCheck workstation's branch have enabled eReceipts in the **EReceipt options** parameter, and an eReceipt option is set in the patron's record. The eReceipt is sent when the patron selects **Exit** in Polaris ExpressCheck.



- **Printed receipts** - See [“Setting Up Printed Receipts”](#) on page 168.

Item Record Circulation Settings



Two tables affect circulation-related settings in the item record: the Material Types policy table defines standard descriptions for specific items held by the library, and the Circulation Statuses database table defines standard labels for item circulation statuses. In addition, Patron Services parameters control the following features:

- Temporary shelving status for items to allow time for items to be shelved after they are returned and checked in, set with the **Shelving status options** parameter.
- Link to the item's last borrower from the item record, or suppress this link for privacy purposes, set with the **Last use patron display** parameter.

In addition, if your library uses NCIP, you should map item material types to the NCIP medium types defined by the NCIP standard.

For more information about items that can float from one branch to another, see [“Setting Up Floating Collections”](#) on page 360.

See the following topics:

- [“Defining Material Types”](#) on page 198
- [“Mapping Item Material Types to NCIP Medium Types”](#) on page 31
- [“Viewing Circulation Statuses”](#) on page 200
- [“Setting Shelving Status”](#) on page 204
- [“Displaying an Item's Last Borrower”](#) on page 208

Defining Material Types

Names for the various material types held by the library are defined in the Material Types policy table. Material types are key elements in determining loan periods, lending limit blocks, and hold policies, and in generating statistics. They are displayed in the following locations:

- In the **Material type** list box on the Item Record workform, the Serial Holdings Record workform, the Selection List Line Item workform, the Purchase Order Line Item workform, and the Invoice Line item workform
- In the PAC availability information for each item associated with a title
- As search limiting options in the staff client Find Tool and the PAC

The same entries are displayed for every organization level at which the Material Types table is opened. Material types can be set from the system, library, and branch levels, but additions and changes are applied to all organizations. You cannot delete a material type from the table in Polaris Administration. The system administrator can change the Material Types table using the Query Analyzer in SQL Server.

The Material Types table is displayed from the Administration Explorer only. You cannot access the Material Types table from an organization workform.

Note:

These System Administration permissions are required to modify the Material Types policy table: **Access administration: Allow, Access tables: Allow, Modify material types table: Allow.**

1-2-3

Add a material type entry

Follow these steps to add a material type to the Material Types policy table.

Important:

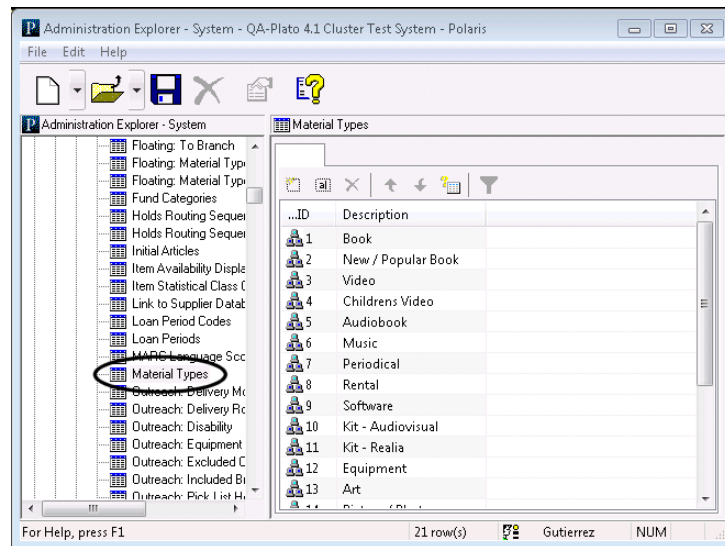
The new material type is available to all organizations.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Material Types**.

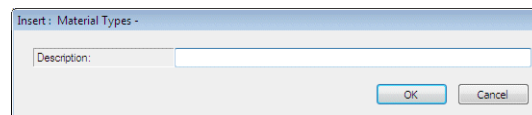
The Material Types table is displayed in the details view.

Tip:

To see the material type code, expand the first column by dragging the column header separator to the right.



2. Click  to display the Insert Material Types dialog box.



3. Type the text describing the material type in the **Description** box.
This text will be displayed in the staff client and in PAC.
4. Click **OK** on the dialog box.
The Material Types table displays the new entry, and the status bar indicates that the modification is pending.
5. Select **File, Save** to save your changes.
The status bar indicates that the record is saved.

Related Information

- **Modify a table entry** - Select the existing material type entry and click . Changes affect all organizations and records using the original entry.
- **Material type for quick-circ items** - Using Polaris Quick-Circ, you can circulate items that are not intended for full cataloging and generate circulation statistics for these items. Your policy may be to use any available and appropriate material type for quick-circ items, or you can set up a material type specifically for this use. See [“Add a material type entry”](#) on page 198. To set a default material type for quick-circ item records, double-click the Patron Services parameter **Quick-circ: Material type**, and select a material type from the list. For more information about creating and using quick-circ items, see [“Circulating Ephemeral Items”](#) in the *Polaris Patron Services Guide 4.1R2*.

Viewing Circulation Statuses

One common set of circulation statuses is used in item transactions from any branch in the system. The Circulation Statuses database table, available only from the Administration Explorer, identifies the standard names for item circulation statuses. Although the circulation status entries are owned by the system level, you can view the table and modify the descriptions from any level. Changes are immediately applied to all Polaris records that use the code, regardless of which organization owns the records.

The Circulation Statuses table is set up during Polaris implementation, conversion, and site installation. All organizations in a Polaris installation must agree on the circulation statuses to use. You cannot add or delete entries in the Circulation Statuses table.

Note:

These System Administration permissions are required to view this table:
Access administration: Allow, Access tables: Allow.

Circulation statuses are displayed in the following locations:

- In the **Circulation status** box on the Item Record workform
- As selections in the **For** and **Limit by** boxes on the Polaris Find Tool when you search for items
- In the PAC availability information for each item associated with a title, if you choose to display detailed item statuses (see [“Set up the local/system item availability display”](#) in the *Polaris Public Access Administration Guide 4.1R2*)

Default Circulation Statuses

The default circulation statuses are:

- **In** - The item is on the shelf and available for circulation.
- **Shelving** - A display status for items that are In but not yet returned to the shelf for circulation. The library defines how long the Shelving status is displayed for an item that is checked in.
- **Out** - The item has been checked out and is in circulation.
- **Held** - The item was requested by a patron while it was in circulation. When the item returned it was “trapped for hold” and set aside for the requestor. The item status is Held until the requestor retrieves the item for check-out.
- **Transferred** - The item was trapped for a hold for a patron from another library, and has been shipped to that library for pickup. The item will remain Transferred until received at the pickup library, where it will become Held. Transferred items may be said to be out-bound.

- **In-Transit** - In-transit items are items that have circulated at a remote branch and have been sent to the assigned branch. They may be said to be in-bound. When received at the Assigned branch and checked in, the item will become In.
- **Claim Returned** - Polaris shows that an item is out, but the patron claims that the item was returned. The staff member used the Claim function in Patron Status to change the item circulation status from Out to Claim Returned. The status will change to In if the item is recovered at circulation.
- **Claim Never Had** - Polaris shows that an item is out, but the patron claims that she never had the item. The staff member used the Claim function in Patron Status to change the item circulation status from Out to Claim Never Had. The status will change to In if the item is recovered at circulation.
- **Lost** - The item was checked out and the patron has informed the library that she lost the item. The staff member changes the status from Out to Lost using the Lost function in Patron Status. Or, the patron may be billed for the item if it has been long overdue, at which point the librarian may declare the item lost. The status will change to In if the item is recovered at circulation.
- **Out-ILL** - Intended to be used in conjunction with a third-party ILL application, for example when using NCIP, to indicate the item has checked out to a remote library.
- **Returned ILL** - Intended to be used in conjunction with a third-party ILL application, for example when using NCIP, to indicate an item out to a remote branch has been returned by that branch.
- **Non-Circulating** - The item does not circulate; the Non-Circulating option is checked in the item record.
- **Missing** - An inventory status indicating that the item is not on the shelf as expected. Missing is distinguished from Lost in that Lost indicates that the item was in fact checked out and did not return. Missing indicates that, to the extent the library can determine, the item has not circulated but cannot be found.
- **Withdrawn** - The item has been removed from the circulating collection. It is not available for check-out or request.
- **Bindery** - The item has been removed from the collection temporarily and sent to the bindery.
- **In Repair** - The item has been removed from the collection temporarily for repair.
- **Unavailable** - A miscellaneous status used to indicate that the item is not available for circulation. No specific reason is associated with the status and there are no links to any program functions.
- **In Process** - The item has recently been received and has not yet completed processing. The status can be assigned automatically at item creation within Acquisitions.

- **On-Order** - The material has been ordered through Acquisitions and item records created in anticipation of receipt. The status can be assigned automatically at item creation within Acquisitions.
- **Routed** - If a routed Serials issue is linked to an item record, the item's circulation status is Routed. Attempts to check out a routed item produce an error message. Check the item in to change its circulation status from Routed to In, and then check it out.

1-2-3

View circulation status names and edit descriptions

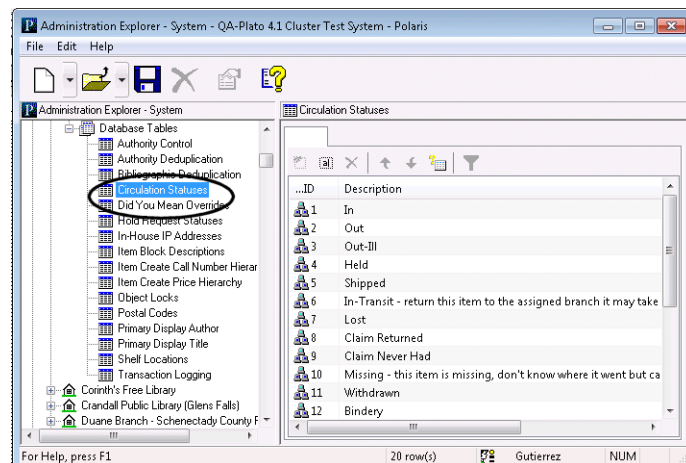
Follow these steps to view the standard names for item circulation statuses. You can modify the description for any circulation status, and you can use the same description for more than one status.

Note:

Be cautious in applying the same description to multiple circulation statuses, since this may confuse both staff and patrons.

1. In the Administration Explorer tree view, open the **Database Tables** folder for the organization, and select **Circulation Statuses**.

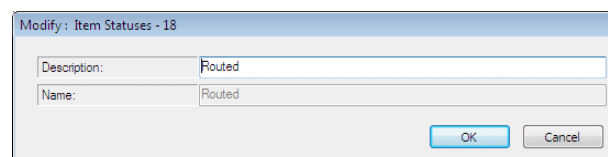
The Circulation Statuses table is displayed in the details view.



2. To modify a description, follow these steps:

- a) Select the circulation status entry and click .

The Modify Item Status dialog box appears.



b) Type the new description in the **Description box.**

Modify the description so that it is understandable to everyone, including patrons. The modification affects only the description that is displayed; it remains associated with the underlying circulation status that appears in the **Name** box.

Note:

The non-circulating item status applies to those items where **Non-circulating** is checked in the item record. When you modify the description for this status, your description is displayed in the PAC for these items, but the description is not available as a Find Tool search filter or an option for bulk change. The actual status is **Non-circulating**.

c) Click **OK.**

The new description is immediately applied to the circulation status for all organizations.

Related Information

- **Shelving status** - When an item is returned to its assigned branch and checked in, the item's circulation status becomes In even though the item may not be returned immediately to the shelf. For each material type, you can set a period of time during which the checked-in item's In status is displayed as Shelving (or another appropriate description). See ["Setting Shelving Status"](#) on page 204.
- **Non-circulating items** - See ["Setting Up Non-Circulating Items"](#) on page 216.
- **Suppressing from PAC by circulation status** - You can suppress items with specific circulation statuses from the PAC availability display. See ["Suppressing Items from Search Results"](#) in the *Polaris Public Access Administration Guide 4.1R2*.
- **Circulation statuses and how they occur** - See ["Default Circulation Statuses"](#) on page 200.

Setting Shelving Status

When an item is returned to its assigned branch and checked in, the item's circulation status becomes In even though the item may not be immediately returned to the shelf. This can be confusing for a patron who finds the item in PAC, notes that the item's status is In, but cannot find it on the shelf because it is still on the book truck. To inform the patron that the item is not yet returned to the shelf, you can set a period of time for each material type during which the item's In status is displayed as Shelving (or another appropriate description).

For the time period you set, patrons see the shelving status description for the item in the PAC. In the staff client, the shelving status description is displayed in Find Tool search results, the PAC preview in the bibliographic record, and the list of linked item records available from the bibliographic record or the item record. You can also limit Find Tool item searches by shelving status. For items checked in offline, when the offline transactions are uploaded, the shelving status display is calculated according to the date/time of the check-in recorded in the upload file.

When you enable the shelving status option, the shelving description is displayed only when an item is checked in during a circulation process and its circulation status changes to In. The option is not used when an item is created with a status of In or when the status of multiple items is changed to In through bulk change.

Note:

If you use Polaris Serials, part of your serials processing workflow may be to create items with a status of In when a serial issue is checked in. To use the shelving status description with these items, set the status to In Process or another status other than In, then check in the item as a circulation process—using **Circulation, Check In** or selecting **Tools, Check In** from the item record workflow.

Use the Patron Services parameter **Shelving status options** to enable this option and control how long the shelving status description is displayed for each material type. You can set the time periods at the system, library, or branch level, but the shelving status description text can be set only at the system level to provide consistency in PAC search results. When an item is checked in, the shelving status settings for the transacting branch are used.

Note:

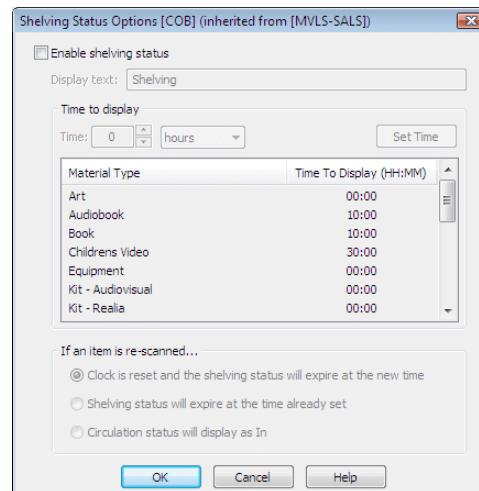
If you have the shelving status option activated for a branch, then turn it off, the status of items currently in "shelving" changes to In. This change may take up to 10 minutes.

1-2-3

Set shelving status options

Follow these steps to set up the shelving status display.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Shelving status options** to display the Shelving Status Options dialog box.



3. Select (check) **Enable shelving status**.
Other options on the dialog box become available.
4. (System level only) Specify the status text to display for an item in the PAC and the staff client Find Tool when an item is checked in and the status changes to In.
The default text is **Shelving**. Use this text or specify any description that will make sense to your patrons, such as **Sorting** or **Recent Return**.
5. Set the period of time to display the shelving status description when an item is checked in by following these steps:
 - a) Select the material type for which you want to set the time period.
You can select multiple material types.

- b) In the **Time** boxes, select **hours** or **minutes**, and type or select the number of hours or minutes.

Shelving Status Options [COB] (inherited from [MVL5-SALS])

☒ Enable shelving status

Display text:

Time to display:

Time: hours

Material Type	Time To Display (HH:MM)
Art	00:00
Audiobook	10:00
Book	10:00
Childrens Video	30:00
Equipment	00:00
Kit - Audiovisual	00:00
Kit - Realia	00:00

If an item is re-scanned...

☒ Clock is reset and the shelving status will expire at the new time

☐ Shelving status will expire at the time already set

☐ Circulation status will display as In

- c) Click **Set Time**.

The number of hours or minutes you specified is listed for the selected material type.

Note:

The time period of the display is set by **Item Shelving Status**, an SQL job that runs at defined intervals, so the time at which an item status changes may not be exact to the minute. Because the SQL job uses system resources, set a realistic period for returning items to the shelves—24 hours instead of nine minutes, for example. Periods less than nine minutes may adversely affect circulation workflows.

Days closed (hours of operation) and dates closed are taken into account. For proper calculation, be sure hours of operation are set up for your branch. See [“Register a branch”](#) in the *Polaris Administration Guide 4.1R2*.

Important:

Time is calculated based on the time the library is open, not a 24-hour clock. For example, if the time period is set to 48 hours, the shelving status remains in effect for 48 *open* hours, not 48 hours straight. Set the time based solely on the average time it takes to shelve items; program calculations will take into account the library’s schedule.

If the period is less than 24 hours, and the item is checked in three hours or more before closing time, the expiration time is not reset.

Example:

The shelving status time period is 6 hours. The item is checked in 5 hours before the library closes. The shelving status display period is calculated using the 5 hours today and 1 hour tomorrow.

If the period is less than 24 hours, and the item is checked in less than three hours before closing time, the expiration time is recalculated.

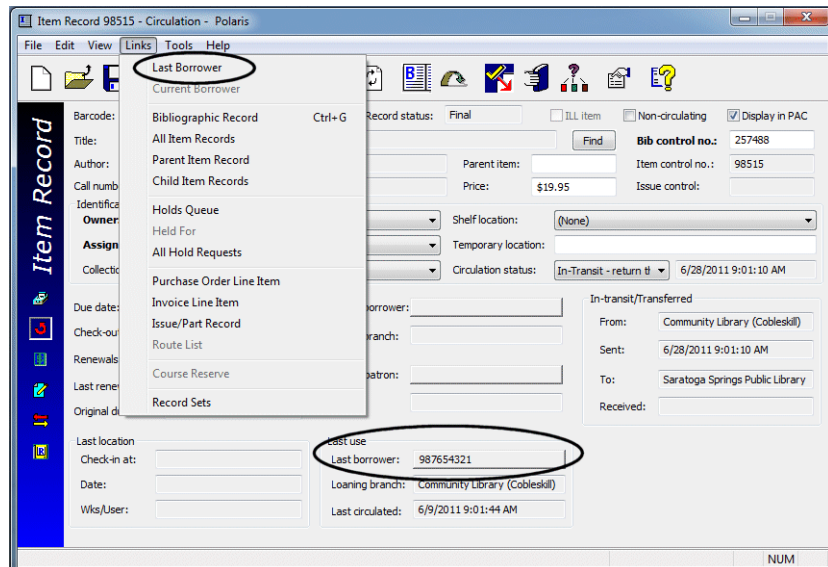
Example:

The shelving status time period is 6 hours. The item is checked in 1 hour before the library closes. The shelving status display period is calculated as 6 hours from the next open day’s opening time.

6. Select an option to specify what should happen when an item is checked in, the status changes to In, and the item is checked in again (circulation status goes from In to In before the shelving status time period has expired):
 - **Clock is reset** - The specified time period to display the shelving status description starts again, as if the item were being checked in the first time.
 - **Shelving status will expire at the time already set** - The clock is not reset. The shelving status description will expire at the end of the original period.
 - **Circulation status will display as In** - The shelving status description will no longer be displayed. In the PAC and staff client Find Tool, the circulation status will be displayed as In.
7. Click **OK** to save your settings.

Displaying an Item's Last Borrower

Use the Patron Services parameter **Last use patron display** to enable a link from the item record to the Patron Status workform for the item's last borrower, or to suppress the link. This parameter also controls whether the patron's barcode is displayed in the Item Record workform. This parameter can be set on the system, library, or branch level. The setting for the log-on branch controls whether the link is available.



1-2-3

Display a previous borrower link in item records

Follow these steps to enable the previous borrower link in item records as displayed for the staff member's log-on branch.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Last use patron display**, and select **Yes**.
3. Select **File, Save**.

Note:

The option **Remove patron ID from circ transactions**, does not remove the link to the last borrower.

Governing Library for Circulation Transactions



The system-level Patron Services parameter Consortium Circulation establishes which library's settings govern certain aspects of check-out and renewal transactions: the patron's branch, the transacting branch, or the item's assigned branch. An additional setting for lost item recovery governs which library's settings determine how charges are processed when a lost item is recovered at check in. The governing library settings are particularly useful for setting uniform processing rules in consortia whose members may have widely differing individual policies.

You can set the governing library for due date calculation, loan and request limits, fine calculation, and lost item recovery. See the procedure in this unit for details and exceptions. The following transactions are affected:

- **Due date calculation** - Check-out and renewal from the staff client; renewal from PAC; check-out and renewal from Polaris ExpressCheck; renewal by telephone (Polaris Phone Attendant). A renewal uses the settings for the governing library of the check-out transaction.
- **Loan and request limits** - Check-out and renewal from the staff client, including renewal from the patron account; renewal from PAC; check-out and renewal from Polaris ExpressCheck; renewal by telephone (Polaris Phone Attendant); offline upload. A renewal uses the settings for the governing library of the check-out transaction.
- **Fine calculations** - Check-out and renewal from the staff client, including renewal from the patron account; renewal from PAC; check-out and renewal from Polaris ExpressCheck; renewal by telephone (Polaris Phone Attendant); offline upload; check in from the item record; lost item charge options. A renewal uses the settings for the governing library of the check-out transaction.
- **Lost item recovery** - Check-in transactions from the Check In workform (Normal and Bulk modes), the Item Record workform, the Find Tool results list, and the Patron Status workform. For offline check in, the settings are checked and the appropriate charges are calculated when the offline transactions are uploaded.

Governing library settings do not affect reserve item records, which always circulate according to the reserve item's assigned branch, or offline check-out and renewal.

See the following topic:

- [“Set the governing library for circ transactions”](#) on page 210

1-2-3

Set the governing library for circ transactions

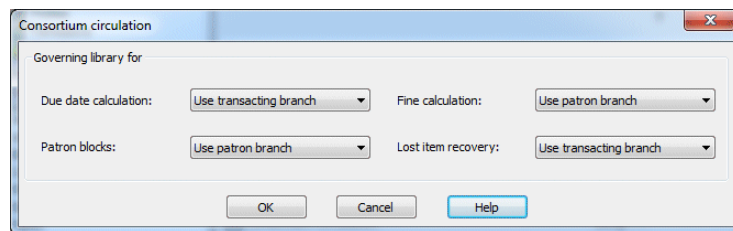
Follow these steps to set the governing library for circulation transactions.

Important:

Your settings for this parameter apply to all organizations.

1. In the Administration Explorer tree view, open the **Parameters** folder for the system, and click the Patron Services tabbed page in the details view.
2. Double-click **Consortium Circulation**.

The Consortium circulation dialog box appears.



3. **Due date calculation** - Select one of the following options to specify the governing library for due date calculation:
 - Use item assigned branch (default)
 - Use patron branch
 - Use transacting branch

The due date calculation selection specifies which branch's settings in the Loan Periods policy table and the Patron Services parameter **End-of-term due date options** are used when the due date is calculated at circulation. *Exceptions:*

- At circulation, an end-of-term due date setting overrides a special loan period if the governing library is the item's assigned branch or the patron's branch. But if the governing library is the transacting branch, the special loan period overrides the end-of-term due date setting.
- The system always uses the **Hours of operation** (closed days) parameter settings and Dates Closed policy table of the *transacting branch* when calculating the due date.
- The system checks the governing library's Loan Periods policy table to determine if an item is an hourly loan. If so, the system then uses the **Hours of operation** and **Overnight loan period** parameter settings of the *transacting branch*.
- The Patron Services parameters **Overdues: Clear fine if recovered at check-out** and **Overdues: Clear fine if recovered at renewal** are set at the system level, so the same settings for these parameters apply to all organizations in the system.

4. **Patron blocks** - Select one of the following options to specify the governing library for patron blocks (loan and request limits):

- **Use patron branch** (default)
- **Use transacting branch**

This selection specifies which branch's settings in the Patron/Material Type Loan Limit Blocks policy table are used at check-out and renewal. This table also limits the total numbers of hold and ILL requests, and the number of hold requests allowed for specific material types. For these request limits, the "transacting branch" is the pick-up branch for the request.

Exceptions:

- This setting affects only the Patron/Material Type Loan Limit Blocks policy table. It does not affect any other types of blocks, such as free-text blocks, library-assigned blocks, collection agency blocks, verify borrower blocks, patron record expiration blocks, or address check blocks.
- This setting does not affect the block on an item designated as non-circulating.

5. **Fine calculation** - Select one of the following options to specify the governing library for fine calculation:

- **Use item assigned branch** (default)
- **Use patron branch**
- **Use transacting branch** (usually the check-in branch)
- **Use lending branch**

The fine calculation selection specifies which branch's settings in the following Polaris Administration controls are used when a fine is calculated at circulation: Fines policy table, including grace units; Dates Closed policy table; the Patron Services parameter **Days not fineable**; the Patron services parameter **Lost item charge options**.

Exception:

- This setting does not affect the Patron Services parameter **Free days**. The system always uses the **Free days** setting of the transacting branch.

6. **Lost item recovery** - Select one of the following options to specify the governing library for lost item recovery:

- **Use transacting branch** (default - usually the check-in branch)
- **Use lending branch**

The lost item recovery selection specifies which branch's settings in the Patron Services parameter **Lost item recovery** are used when a lost item is recovered at check-in.

7. Click **OK** on the dialog box.
8. Select **File, Save** to save your changes.

Related Information

- **Loan periods** - See [“Defining Loan Periods”](#) on page 213.
- **Loan and request limit blocks** - See [“Defining Loan and Request Limit Blocks”](#) on page 332.
- **Overdue fines** - See [“Setting Fine Amounts”](#) on page 233.
- **Lost item charge processing and recovery** - See [“Overdue Fines on Lost Items”](#) on page 243 and [“Setting Lost Item Recovery Defaults”](#) on page 248.

Defining Loan Periods



Due date calculation is based on settings in both the patron record and item record, as well as the policies and schedule of the lending library. Polaris Administration tables define patron codes and item loan period codes, and determine the relationships between them. At check-out, the system links the item and patron records and determines which settings to use when calculating the due date.

Patron codes and item loan period codes are shared by all libraries to facilitate lending and receiving items anywhere in the system. However, each branch in the system can establish different policies concerning loan durations for specific patron and item code combinations.

Important:

You set which branch's policies are used in due date calculation with the system-level Patron Services parameter **Consortium Circulation**. For details, see ["Governing Library for Circulation Transactions"](#) on page 209.

The settings used to calculate due dates are established when Polaris is first installed, but you can change them when a library or branch is added to the system, or when lending policies change. After you set up the criteria that affect due dates, you can set up fines for overdue items. See ["Defining Fines and Fees"](#) on page 225.

See the following topics:

- ["Calculating Due Dates"](#) on page 214
- ["Defining Loan Period Codes"](#) on page 217
- ["Defining Loan Period Durations"](#) on page 219
- ["Setting End-of-Term Due Dates"](#) on page 222

Calculating Due Dates

When a patron checks out an item, the due date is calculated based on the patron code and item loan period relationship established by the governing library for the transaction (by default the item's assigned branch), plus the closed dates and hours of operation of the lending library. The patron code is stored in the patron record, while the loan period code is stored in the item record. The Loan Periods policy table associates the patron code and loan period code to determine the loan period for an item assigned to a particular branch.

All daily and weekly loans are due at 11:59 P.M. on the due date. For information on items with a loan period set in hours or minutes, see ["Hourly Loans"](#) on page 215.

Note:

For daily and weekly loans, overdue fine calculation does not begin until the end of the day. For hourly loans, fines are calculated according to the exact time due. See ["Calculating Overdue Fines"](#) on page 226.

Undefined and Standard Loan Periods

If a relationship between the patron code and loan period code cannot be found in the Loan Periods policy table, Polaris uses the setting in the Patron Services parameter **Undefined loan period**, which is set at the system level. The default value is 14 days. This value is also used to automatically add an entry to the table if a new branch or patron code is added.

Note:

If a loan period cannot be found in any table or parameter, a message at check-out indicates that the loan period cannot be calculated. In this case, circulation staff can allow the system to use the undefined loan period setting, or they can set the item's loan period manually, by opening the Special Loan dialog box from the Check Out workflow.

For offline circulation, the system always uses the workstation branch's setting for the Patron Services parameter **Standard loan period** to calculate the due date. This is because there is no access to the database during offline circulation. However, the Loaning Branch recorded in the transaction and in the item record is the logged-on user's branch. This allows libraries to gather statistics for different bookmobile stops based on user log-on, while maintaining a consistent loan period for the bookmobile (the workstation branch).

Closed Dates and Days

The lending library's closed dates and closed days are used in the due date calculation. If the due date is defined as closed in the Dates Closed policy table (for example, January 1), the due date moves to the next open date. See [“Identifying Dates Closed”](#) in the *Polaris Administration Guide 4.1R2*. If the Patron Services parameter **Hours of Operation** designates the day of the week as a closed day for the branch (for example, Sunday), the due date moves to the next open day.

Hourly Loans

For hourly loan due dates and times, Polaris checks these additional Patron Services parameters for the lending library: **Hours of operation** (for hours and closed days) and **Overnight loan period**. If the item is due *after* the lending library closes, one of the following events occurs:

- If the **Overnight loan period** parameter is set to permit automatic overnight loans, the due date is set to the next day the library is open. The due time is set to the library's opening time, plus any additional time specified by the library.
- If the **Overnight loan period** parameter is set to *not* permit automatic overnight loans, one of the following events occurs:
 - If the loan period is less than 24 hours, the transaction is blocked. If you override the block, the due date is set to the next day the library is open, and the due time is set to the library's opening time, plus any additional time specified by the library. If you do not override the block, the item is due at the lending library's closing time on the current day.

Example:

An item is checked out on Thursday at 4:00 P.M. for a six-hour loan period. The lending library closes at 8:00 P.M. and opens on Friday at 10:00 A.M. If automatic overnight loans are permitted plus two additional hours, the item is due on Friday at 12:00 noon. If automatic overnight loans are not permitted, the transaction is blocked. If you override the block, the item is due on Friday at 12:00 noon. If you do not override the block, the item is due when the library closes on Thursday at 8:00 P.M.

- If the loan period is 24 hours or more, the transaction is not blocked because the overnight loan setting is irrelevant.

You can set the **Overnight loan period** parameter at the system, library, or branch level.

Setting Up Non-Circulating Items

You can designate certain items as non-circulating in two ways:

- To make a specific item non-circulating for all patrons, select the **Non-circulating** check box on the Item Record workform - Circulation view. An advantage of this method is that patrons can see that an item is non-circulating in their PAC search results. You can set a special PAC description for these items. See [“View circulation status names and edit descriptions”](#) on page 202.
- To make some items non-circulating for certain patron codes only, create a non-circulating loan period code. See [“Add a loan period code”](#) on page 217. Then assign the loan period code to the appropriate patron codes, and specify a **Units** value of 0 for each restricted patron code. See [“Add a loan period”](#) on page 220.

When a patron attempts to check out a non-circulating item, a block appears. If the circulation staff member overrides the block, and the item itself is non-circulating, Polaris assigns a loan period according to the loan period code in the item record. If the circulation staff member overrides the block, and the item is non-circulating for specified patron codes, Polaris assigns a loan period of one time unit as defined in the Loan Periods table.

Defining Loan Period Codes

The Loan Period Codes policy table sets the loan period codes for an organization. These codes are the names assigned to the various loan periods established by each organization. They are used in combination with patron codes to calculate due dates and fine amounts. The loan period codes are displayed as selections in the Loan Periods policy table, Fines policy table, and **Loan period code** box on the Item Record workflow.

The Loan Period Codes policy table can be displayed on an organization workflow or with the Administration Explorer. Loan period codes can be added from the system, library, and branch levels, but they are then available to all organizations. You cannot delete loan period code entries in Polaris Administration, but the system administrator can change the Loan Period Codes table using the Query Analyzer in SQL Server.

Note:

These System Administration permissions are required to modify this table:
Access administration: Allow, Access tables: Allow, Modify loan period codes table: Allow.

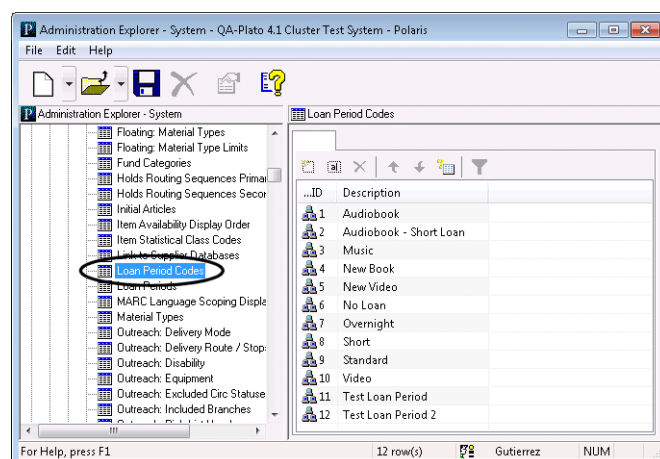
1-2-3

Add a loan period code

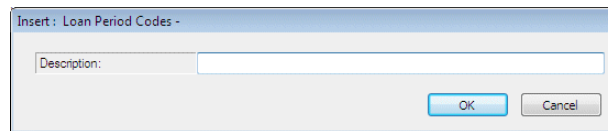
Follow these steps to add a loan period code to the Loan Period Codes policy table.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Loan Period Codes**.

The Loan Period Codes table is displayed in the details view.



2. Click  to display the Insert Loan Period Codes dialog box.



3. Type the name describing the loan period in the **Description** box.

Note:

Loan period codes can be numbers, abbreviations, or full descriptions.

4. Click **OK** on the dialog box.

The Loan Period Codes policy table appears with the new loan period name. The status bar indicates that the modification is pending.

5. Select **File, Save** to save your changes.

The status bar indicates that the record is saved. The new loan period code appears in the policy table for every organization in the system.

Related Information

- **Modify a table entry** - Select an entry, click , and change the description. You should limit your changes to correcting spelling or using a different choice of words for the same loan period code.

Important:

Any changes to an existing loan period code are immediately applied to all records using the original code.

- **Set up loan period durations** - See [“Defining Loan Period Durations”](#) on page 219. Default loan period durations are set with the Patron Services parameter **Fine and Loan period defaults**.

Defining Loan Period Durations

A loan period specifies how long an item can be checked out, based on the loan period code assigned to the item and the patron code of the person checking out the item. You can specify a different time period for each combination of loan period code and patron code. You can have only one loan period for a specific loan period code/patron code combination in each branch.

Loan periods are defined by entries in the Loan Periods policy table, which can be displayed on an organization workform or with the Administration Explorer. Loan periods can be set from the system, library, and branch levels. However, entries are assigned to specific branches, and you specify loan periods for each branch. Your setting for governing library determines which branch's settings are used in calculating the loan period. The default is the item's assigned branch. See [“Governing Library for Circulation Transactions”](#) on page 209.

When the table is opened at the system level, you can view, add, or change entries for any branch. At the library level, you can view, add, or change entries for the branches associated with the library. At the branch level, you can view, add, or change entries for the selected branch. You cannot delete loan period entries in Polaris Administration. The system administrator can change the Loan Periods table using the Query Analyzer in SQL Server.

Note:

The following System Administration permissions are required to modify this table: **Access administration: Allow, Access tables: Allow, Modify loan periods table: Allow.**

1-2-3

Add a loan period

Follow these steps to add a loan period in the Loan Periods policy table.

Note:

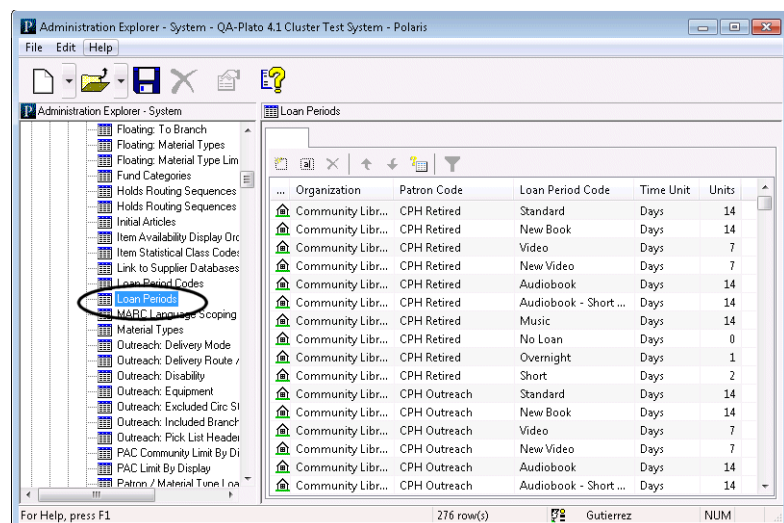
You must set up the Loan Period Codes policy table (see [“Defining Loan Period Codes”](#) on page 217) and Patron Code policy table (see [“Defining Patron Codes”](#) on page 23) before you do this procedure. Default loan period values are set with the Patron Services parameter **Fine and Loan period defaults**, and the default value is used when you add a new loan period code until you change it.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Loan Periods**.

Note:

To better manage memory, a program-defined row limit determines whether this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

The Loan Periods table is displayed in the details view.



2. Click  to display the Insert Loan Periods dialog box.

Insert : Loan Periods -

Organization:

Patron Code:

Loan Period Code:

Time Unit:

Units:

*Note: Insertions for this table are limited to Branch organizations.

OK Cancel

3. Select the branch for which you are assigning the loan period in the **Organization** list.

Note:

If the Loan Periods policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

4. Select the patron code for the loan period in the **Patron Code** box.
5. Select an entry in the **Loan Period Code** box to associate with the patron code shown in the **Patron Code** box.

Note:

The options available in the **Loan Period Code** box depend on the organization you selected. See [“Defining Loan Period Codes”](#) on page 217.

6. Select one of the following loan duration units in the **Time Unit** box:
 - Days
 - Hours
 - Minutes
7. Type the number of time units allowed for this loan period in the **Units** box.

Note:

To set up a non-circulating loan period code, type **0** in the **Units** box.

8. Click **OK** in the dialog box.

The Loan Periods policy table appears with the new loan period entry. The status bar indicates that the modification is pending.

9. Select **File, Save** to save your changes.

The status bar indicates that the record is saved.

Related Information

- **Modify a table entry** - Select the entry and click . You can change the loan period code and duration in an entry; the assigned library and patron code cannot be changed in an existing loan period.
- **Set recurring or specific due dates by patron code only** - See [“Setting End-of-Term Due Dates”](#) on page 222.
- **Undefined loan period** - You can set a default value to use at check-out when a specific patron code/loan period code combination does not exist in the Loan Periods table. See [“Undefined and Standard Loan Periods”](#) on page 214.
- **Lending library schedule** - Due date calculation takes into account the closed dates, closed days, and hours of operation for the lending library. See [“Closed Dates and Days”](#) on page 215.
- **Hourly loans** - The Patron Services parameter **Overnight loan period** affects the date and time due for hourly loan items. See [“Hourly Loans”](#) on page 215.

Setting End-of-Term Due Dates

To prevent items from circulating after a specific or recurring date, regardless of the item's loan period, your library can set an end-of-term (EOT) due date. Academic libraries and public libraries that work with schools may use this feature to make sure that no items are due after the last day of a term. Libraries may also use an EOT date to gather all circulating material by a certain date for inventory or another special purpose. You can include or exempt specific patron codes from a selected EOT date.

End-of-term dates affect circulation transactions in the following ways:

- If you attempt to check out or renew an item with a due date after the next EOT date, the item is assigned the EOT date. However, if a patron with an exempted patron code (such as a faculty member) is checking out the item, the due date can be after the EOT date.
- To override an EOT date for an item, you can assign a special loan period at check-out or renewal. See [“Assign a special loan period”](#) in the *Polaris Patron Services Guide 4.1R2*.
- By default, Polaris uses the EOT date of the item's assigned branch, *not* the EOT of the check-out branch. You can set a different governing library for the calculation. See [“Governing Library for Circulation Transactions”](#) on page 209.

You set EOT dates with the Patron Services parameter **End-of-term due date options**, which is available at the system, library, and branch levels.

1-2-3

Set an end-of-term due date

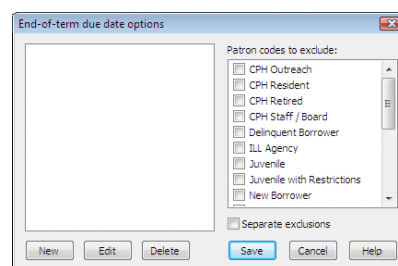
Follow these steps to set an end-of-term due date.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Patron Services** tab in the details view.

Important:

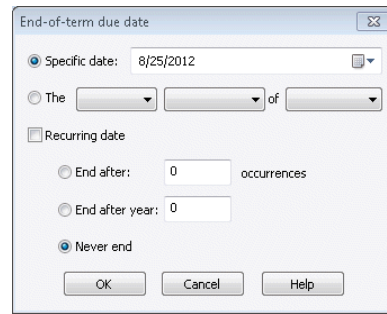
Although you can set EOT dates at any organizational level, settings made at higher levels do not display at the branch level but may nevertheless override branch-level settings. To avoid this issue, set all EOT dates at the branch level, especially if different organizations need different dates.

2. Double-click the parameter **End-of-term due date options** to display the End-of-Term Due Date Options dialog box.



3. Click New.

The End-of-Term Due Date dialog box appears.

The image shows a dialog box titled "End-of-term due date". It has a close button in the top right corner. The dialog is divided into two main sections. The first section, "Specific date", is selected with a radio button and contains a date field showing "8/25/2012" with a calendar icon to its right. Below this is a section labeled "The" followed by three dropdown menus and the word "of". The second section, "Recurring date", is unchecked. It contains three radio button options: "End after:" followed by a field with "0" and the word "occurrences"; "End after year:" followed by a field with "0"; and "Never end", which is currently selected. At the bottom are three buttons: "OK", "Cancel", and "Help".**4. Choose one of the following options to set the EOT date:**

- To set one numeric date, click **Specific date**, and select the date from the calendar in the **Specific date** box.

Example:

Friday, December 16, 2011

- To set the date by day of the month, click **The** and select a value in each of the three boxes (order, day, and month).

Example:

The third Friday of December

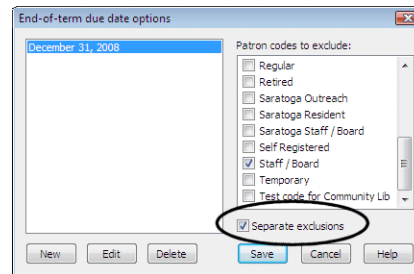
5. If you want the date to be a recurring date, select the **Recurring date check box, and choose one of the following options:**

- To stop the EOT date from functioning after a specific number of occurrences, click **End after** and type the number in the occurrences box.
- To stop the EOT date from functioning after a specific year, click **End after year** and type the year in the box.
- To keep the EOT date functioning indefinitely, click **Never end**.

6. Click OK.

The End-of-Term Due Date Options dialog box appears. The EOT date is listed in the left panel of the dialog box.

7. To prevent the EOT date from applying to specific patron codes, select the EOT date and do one of the following:
 - To exclude certain patron codes from *all* EOT dates, in the **Patron codes to exclude** list, select the check box next to each patron code for which EOT dates should *not* apply.
 - To exclude certain patron codes from *the selected EOT date only*, select the **Separate exclusions** check box, then select the check box next to each patron code to exclude.



8. Repeat steps 3-7 for each EOT date you want to create.
9. Click **Save**.
The Administration Explorer appears.
10. Select **File, Save** to save your changes.

Related Information

- **Edit an end-of-term due date** - On the End-of-Term Due Date Options dialog box, select an EOT date in the list, and select one of the following options:
 - To change the date and recurrence information, click **Edit**. The End-of-Term Due Date dialog box appears. Make any changes, and click **OK**.
 - To change the patron codes excluded from the selected EOT date, select the **Separate exclusions** check box, and select or clear the check boxes next to the patron codes.
 - To change the patron codes excluded from *all* EOT dates, clear the **Separate exclusions** check box, and select or clear the check boxes next to the patron codes.
- **Delete an end-of-term due date** - On the End-of-Term Due Date Options dialog box, select the EOT date in the list, and click **Delete**. The EOT date is cleared from the list.
- **Display a message at circulation** - When a normal due date is shortened due to an End-of-Term date setting, you can set Polaris to display a message. Set the Patron Services parameter **Due date truncated: Prompt** to **Yes** at the system, library, or branch level.

Defining Fines and Fees



Administration tables and parameters, combined with settings in the item and patron records, control how fines are calculated. The Administration settings are established when Polaris is first installed, but you can change them when a library or branch is added to the system, or when lending policies change. Polaris Administration tables define patron codes and item fine codes, and determine the relationship between them. Patron codes and fine codes are shared by all libraries to make circulation consistent throughout the system. However, each branch in the system can establish different policies concerning fines for specific combinations of patron and item fine codes. If an item is overdue at check in, the fine is automatically calculated based on these settings and posted to the patron's account. You can also set Polaris to waive fines automatically for items recovered at check out or renewal.

Important:

You set which branch's policies are used in fine calculation with the system-level Patron Services parameter **Consortium Circulation**. See ["Governing Library for Circulation Transactions"](#) on page 209.

Note:

Set the criteria that determine due dates before you set up fines. See ["Defining Loan Periods"](#) on page 213.

The library may also define fees that are unrelated to fines. For example, you may charge patrons for hold requests, equipment rental, damaged or lost items, and checkout and renewal for certain types of items. In Polaris Administration, you set up the fee descriptions at the system level, and at the branch level determine which reasons are displayed to staff for selection. You can also set up default replacement and processing fee amounts for items the library does not expect to recover, and how to handle overdue charges on lost items. Additional settings control how the charges associated with lost items are processed when the items are recovered at circulation.

See the following topics:

- ["Calculating Overdue Fines"](#) on page 226
- ["Setting Fine Codes"](#) on page 231
- ["Setting Fine Amounts"](#) on page 233
- ["Defining Fee Descriptions"](#) on page 237
- ["Setting Replacement Fee Defaults"](#) on page 241
- ["Overdue Fines on Lost Items"](#) on page 243
- ["Setting Lost Item Recovery Defaults"](#) on page 248
- ["Charging for Checkout and Renewal"](#) on page 252

Calculating Overdue Fines

Overdue fines are calculated when the item is checked in and the check-in date/time is past the due date/time. Ordinarily, for daily and weekly loans, a fine is calculated if an item is returned the day following the due date. The patron has until the end of the due date to return the book, even if the check-out time was early in the day. For hourly loans, a fine is calculated according to the exact time due. The Fines policy table associates patron codes with fine codes to determine the fine for the overdue item (see [“Setting Fine Amounts”](#) on page 233).

Note:

If no fine can be determined in the Fines table, a message at check-in indicates that the fine cannot be calculated. The check-in clerk can set a fine manually, using the **Overdue Amount** box on the Resolve Billed Item dialog box, or by adding an entry in the Patron Status workform - Account view for the patron.

Fine calculations are also affected by dates closed, days designated as not fineable, free days, and grace periods.

Dates Closed

For each organization, the Dates Closed policy table defines specific closed dates that fall when the organization might otherwise be open. For more information, see [“Identifying Dates Closed”](#) in the *Polaris Administration Guide 4.1R2*. You specify which branch’s entries in this table are used in fine calculation with the system-level Patron Services parameter **Consortium Circulation**. For details, see [“Governing Library for Circulation Transactions”](#) on page 209.

Example:

A library designates January 1 as a closed date. If an item is returned to that library on January 2, 2012, fines are not charged for January 1, based by default on the setting for the receiving branch (and regardless of the setting for the item’s assigned branch).

Important:

The system uses dates defined at the system or library level if none are defined for the governing branch. For consistent results, you may want to leave the Dates Closed policy table empty at the system and library levels and set dates only at the branch level, or set the same dates at the system, library, and branch levels.

Days Not Fineable

You can designate specific days of the week as not fineable with the Patron Services parameter **Days not fineable**. You can set this parameter at the system, library, or branch level. You specify which branch's setting for this parameter is used in fine calculation with the system-level Patron Services parameter **Consortium Circulation** (see [“Governing Library for Circulation Transactions”](#) on page 209).

Example:

A library designates Sunday as a “day not fineable” because the library is closed. If an item is due on Saturday and returned at the branch on Monday, fines are not charged for Sunday, based by default on the setting for the receiving branch (and regardless of the setting for the item's assigned branch). No Sunday is calculated in a fine. For a book seven days overdue, the fine is calculated for six days because Sunday is not counted. For a book 14 days overdue, the fine is calculated for 12 days.

Important:

The system uses days defined at the system or library level if none are defined for the governing branch. For consistent results, you may want to leave the **Days not fineable** parameter set to **None** at the system and library levels and set days only at the branch level, or set the same days at the system, library, and branch levels.

Free Days

Free days are omitted from the overdue fine calculation during normal, bulk, or offline check in, and are typically set to cover unexpected closings. Libraries that allow items to be returned to non-Polaris libraries may find this feature especially useful; using the Free Days calendar control, staff can pick the date the item was returned at the non-Polaris library and the correct number of Free Days is automatically applied. The following Patron Services parameters control free days; you can set them at the system, library, and branch levels:

Note:

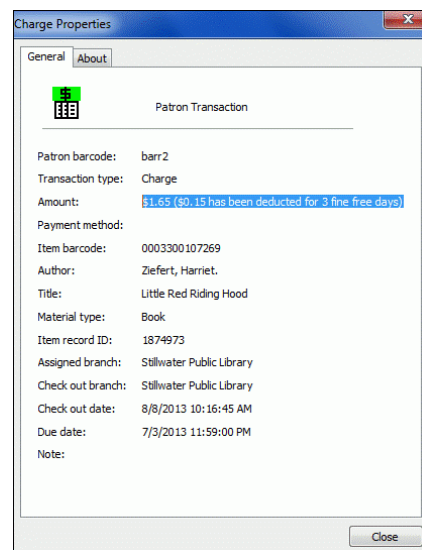
The governing library for fine calculation setting does not affect the free days parameters. The system always uses the free days settings of the receiving branch.

- **Free days (normal)** - Determines the default number of free days for normal check in. Staff members with the appropriate permission can change the setting at normal check in (Check In workform - Normal view) using the **Free days** box or calendar on the workform. The new setting applies to the current check-in session.

- **Free days (bulk)** - Determines the number of default days for bulk and offline check-in. This setting also applies to check in or renewal from the Patron Status workform - Items out view, the item record, Find Tool, and during check out when an item already checked out to one patron is checked out to another. Staff members with the appropriate permission can change the setting at bulk check in (Check In workform - Bulk view) and when uploading offline transaction files (Bookmobile workform) through the **Free days** box or calendar on these workforms. The new setting applies to the current check in or offline upload session, and does not affect check in from any other workform or the Find Tool.

When an item is billed and declared lost, no free days are applied to the overdue fine calculation.

A check-in transaction subtype indicates how many free days were applied when the item was checked in. Also, if the patron was charged overdue fines when the item was checked in, the Properties dialog box for the charge in the patron account shows how many free days were applied and the amount that was deducted for the free days. To open the dialog box, right-click the charge in the Patron Status workform - Account view.



Grace Periods

A grace period allows a patron to return an item just a little late without incurring a fine. The item is still marked as overdue in the patron record. Grace periods are set in association with specific patron code/item fine code combinations in the Fines policy table. For more information, see [“Setting Fine Amounts”](#) on page 233. A grace period differs from free days in that free days are omitted from the overdue fine calculation no matter when the item is checked in, whereas if an item is checked in after a grace period, the fine is calculated from the day or hour after the item due time.

Example:

If an item is checked out at 10:12 A.M. on Monday and circulates for a week, it becomes overdue at 12:00 A.M. on Tuesday (one minute after 11:59 P.M. on Monday). There is one grace day. Due to the grace period, the patron is not charged an overdue fine if the item is returned on or before 11:59 P.M. on Tuesday. If the item is returned after 11:59 P.M. on Tuesday, the patron is charged for one day overdue.

You can optionally include closed days and dates in your system's grace period calculations. Set the system-level Patron Services parameter **Overdues: Add closed days/dates to grace days** to **Yes** to include these in the calculation. The default setting is **No**.

If you set the option to **Yes**, and the grace period includes one or more "days closed" as defined in the Patron Services parameter **Hours of Operation** or "closed dates" as defined in the **Dates Closed** policy table according to the governing library for fine calculation, the grace period will be extended by the number of closed days or dates. For example, if the number of grace days is 2 and if Sunday is a closed day, no fine will be assessed if the item is due on Friday and returned on Monday. But if **Overdues: Add closed days/dates to grace days** is set to **No** (the default value), only the two grace days, Saturday and Sunday, would be considered, and the fine would be assessed if returned on Monday.

Important:

The Free Days setting and the calculation of the actual fine amount are not affected by setting **Overdues: Add closed days/dates to grace days** to **Yes**. The grace period exempts the patron from the fine, but if grace days are exceeded, the fine is calculated as if there were no grace period.

Waiving Fines Automatically at Circulation

Two system-level Patron Services parameters control whether fines are waived automatically when items are recovered at circulation. To automatically waive the fine if an overdue item is found during check-out, set **Overdues: Clear fine if recovered at check-out** to **Yes**. To automatically waive the fine if the patron is renewing an overdue item, set **Overdues: Clear fine if recovered at renewal** to **Yes**. Both parameters are set to **No** by default. (These settings also apply to SIP self-check units.)

Note:

Separate settings control how overdue fines for lost items are handled. See ["Overdue Fines on Lost Items"](#) on page 243.

Charging Fines Automatically at Check In

The Patron Services parameter **Check in: auto-charge fine from item work form and find tool context menu**, controls whether overdue fines are automatically charged to the patron account when overdue items are checked in from the

Item workflow, the Find Tool context menu, or the Patron Status workflow - Items Out view. The parameter is available at the system, library, and branch levels and is set to **Yes** by default.

When the parameter is set to **Yes** and an overdue item is checked in, the fine is automatically charged to the patron account. If the overdue item can fill an active hold request, the hold request message appears and the staff member takes action on the hold request message. (When the parameter is set to **Yes** and a *billed* item is checked in, the Resolve lost/billed item dialog box appears, the staff member resolves the billed charges, and the item is checked in. If the billed item can fill a request, the hold request message appears before the Resolve lost/billed item dialog box. The staff member takes action on the hold request message first.)

If the parameter is set to **No**, the Check In - Fine dialog box appears when the item is overdue, and the staff member resolves the fine accordingly. However, if the item can fill a hold request, the hold request message always appears first.

Fines for Claimed Items

A system-level Patron Services parameter controls whether fines are charged if an overdue item with a status of Claimed Returned or Claimed Never Had is checked in or checked out. To automatically waive overdue fines for these items at circulation, set **Overdues: Charge fines for claimed items** to **No**. This setting waives fines for overdue claimed items found at renewal, normal and offline check in and check out, and Polaris ExpressCheck check out. The parameter is set to **Yes** by default.

Setting Fine Codes

Fine codes represent the various fine policies used in combination with patron codes to determine fine amounts. Fine codes are displayed as selections in the Fines policy table and the **Fine code** box on the Item Record workform.

Fine codes are defined as entries in the Fine Codes policy table, which can be displayed on an organization workform or with the Administration Explorer. Fine codes can be added from the system, library, and branch organization levels, but they are then available to all organizations. You cannot delete fine code entries in Polaris Administration, but the system administrator can change the Fine Codes table using the Query Analyzer in SQL Server.

Note:

These System Administration permissions are required to modify this table:
Access administration: Allow, Access tables: Allow, Modify fine codes table: Allow.

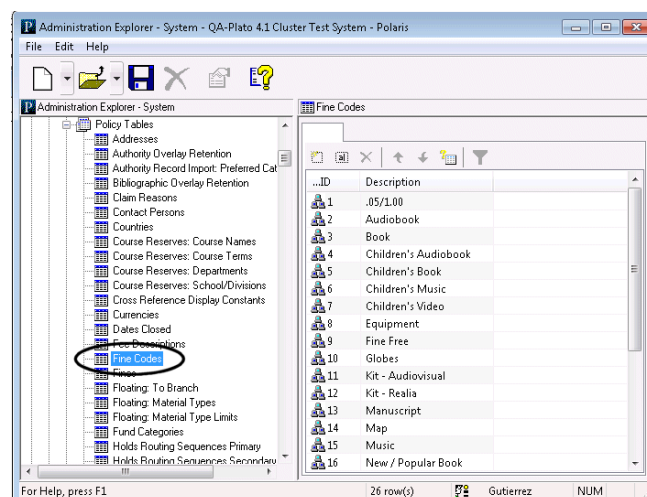
1-2-3

Add a fine code

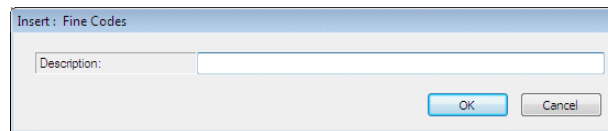
Follow these steps to add a fine code in the Fine Codes policy table.

1. In the Administration Explorer, open the **Policy Tables** folder for the organization, and select **Fine Codes**.

The Fine Codes table is displayed in the details view.



2. Click  to display the Insert Fine Codes dialog box.



3. Type text describing the fine code in the **Description** box.
4. Click **OK** on the dialog box.

The Fine Codes policy table appears with the new fine code name. The status bar indicates that the modification is pending.

5. Select **File, Save** to save your changes.

The status bar indicates that the record is saved. The new fine code is available to all organizations and appears in the Fines table. See [“Setting Fine Amounts”](#) on page 233. Default fine amounts, maximum fine amounts, and grace periods for new fine codes are set with the Patron Services parameter **Fine and Loan period defaults**.

Related Information

Modify a table entry - Select the entry, click , and change the description.

Important:

Any changes to an existing fine code are immediately applied to all records using the original code.

Setting Fine Amounts

Fine amounts are set based on the patron code of the person being charged and the fine code assigned to the item. You can specify a different fine amount for each combination of patron code and fine code, as well as a maximum fine and a grace period for each combination (see [“Grace Periods”](#) on page 228).

Since fine amounts are defined using patron codes, fine codes, and loan periods, you must set up the Patron Codes, Fine Codes, and Loan Periods policy tables before you can define fine amounts. See the following topics: [“Defining Patron Codes”](#) on page 23), [“Defining Loan Period Durations”](#) on page 219, and [“Setting Fine Codes”](#) on page 231.

Fine amounts are set with entries in the Fines policy table, which can be displayed on an organization workform or with the Administration Explorer. Fines can be set from the system, library, and branch levels. However, entries are assigned to specific branches, and you specify fines for each branch in Polaris. You specify which branch’s entries in this table are used in fine calculation with the system-level Patron Services parameter **Consortium Circulation**. See [“Governing Library for Circulation Transactions”](#) on page 209.

When you open the table at the system level, you can view, add, or change entries for any branch. At the library level, you can view, add, or change entries for the branches associated with the library. At the branch level, you can view, add, or change entries for the selected branch. You cannot delete fine entries in Polaris Administration. The system administrator can change the Fines table using the Query Analyzer in SQL Server.

Note:

These System Administration permissions are required to modify this table: **Access administration: Allow, Access tables: Allow, Modify fines table: Allow.**

1-2-3

Add a fine amount

Follow these steps to add a fine amount to the Fines policy table.

Note:

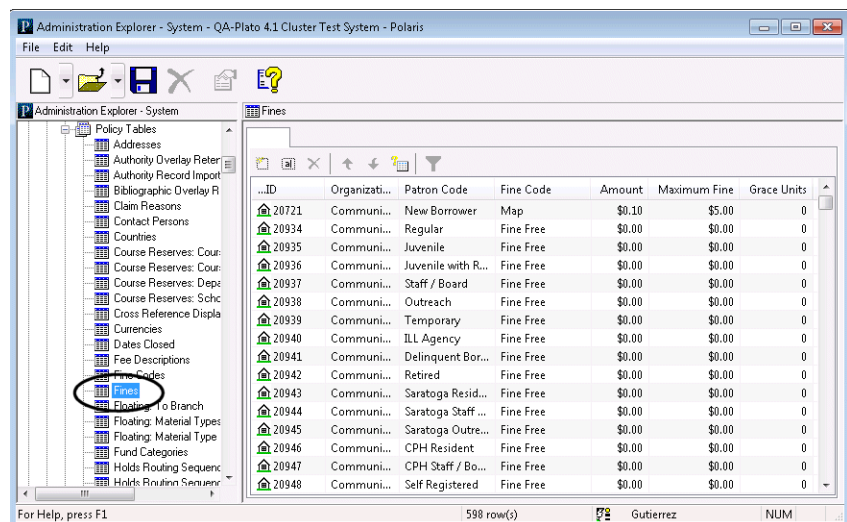
The default fine amount, default maximum fine, and default grace period are set with the Patron Services parameter **Fine and Loan period defaults**, and when you add a new fine code the default value is used until you change it. If for some reason a fine amount cannot be calculated, the setting for the system-level parameter **Undefined Fine Amount** is used. This setting is also used automatically when a new organization or patron code is added to the table.

1. In the Administration Explorer, open the **Policy Tables** folder for the organization, and select **Fines**.

Note:

To better manage memory, a program-defined row limit determines whether this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

The Fines table is displayed.



2. Click  to display the Insert Fines dialog box.

Insert : Fines

Organization:  Community Library (Cobleskill)

Patron Code: 

Fine Code: 

Amount: \$0.00

Maximum Fine: \$0.00

Grace Units:

*Note: Insertions for this table are limited to Branch organizations.

OK Cancel

3. Select the organization for which you are assigning the fine in the **Organization** box.

Note:

If the Fines policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

4. Select the patron code for the fine amount in the **Patron Code** box.
5. Select a fine name in the **Fine Code** box to associate with the patron code shown in the **Patron Code** box.

The options available in the **Fine Code** box depend on the organization you selected. See [“Setting Fine Codes”](#) on page 231.

Note:

If a relationship between the patron code and fine code cannot be found in the Fine Code policy table, Polaris uses the setting in the Patron Services parameter **Undefined fine amount**, which is set at the system level. The default value is \$5.00. This value is also used to automatically populate the table if a new branch or patron code is added.

6. In the **Amount** box, type the amount of money to fine for a single loan period unit for the item.

Example:

The loan period unit for a certain type of item is daily. To set up a fine of 10 cents per day, type \$0.10 in the **Amount** box.

Loan period units are defined in the Loan Period policy table. See [“Defining Loan Period Durations”](#) on page 219. Polaris uses the loan period unit for which an item was charged and the value you put in the **Amount** box to calculate the fine.

7. In the **Maximum Fine** box, type the total amount that can be fined for items associated with this fine description and charged to the selected patron code.
8. In the **Grace Units** box, type the number of loan period units allowed for an overdue item before Polaris begins calculating a fine.

Note:

The actual time specified by the **Grace Units** setting depends on the loan period unit used when the item was checked out. For example, if the item is checked out for 14 days and the grace unit is 1, then the grace period is one day. Any items returned the day after they were due are not charged an overdue fine. A grace period of 0 means that items must be returned by the end of the date they are due. Otherwise, overdue charges apply. Loan period units are defined in the Loan Period policy table.

9. Click **OK** in the dialog box.

The Fines policy table appears with the new fine name. The status bar indicates that the modification is pending.

10. Select **File, Save** to save your changes.

The status bar indicates that the record is saved.

Related Information

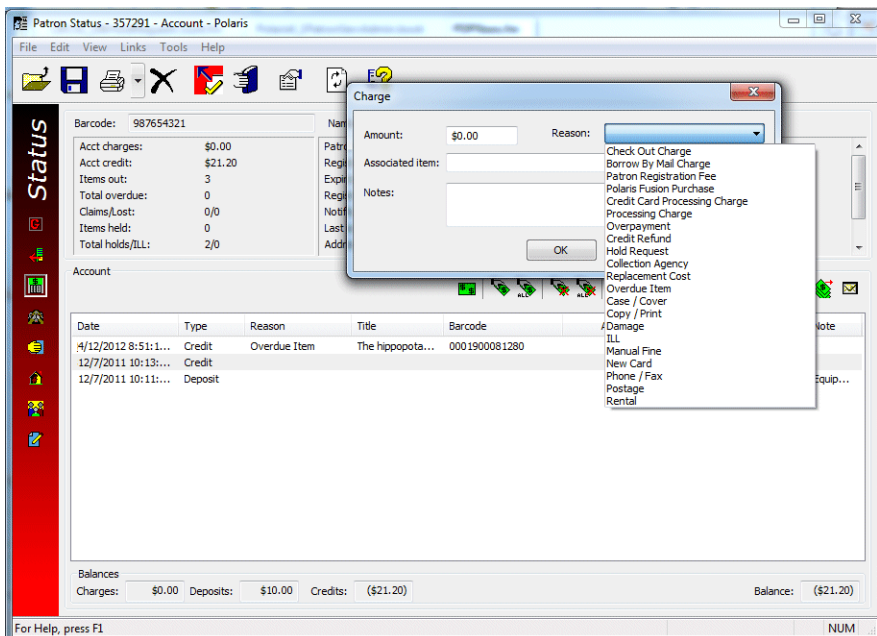
- **Modify a table entry** - Select the entry and click . You can change the amount of the fine, maximum chargeable fine, and the grace period for an existing fine entry.
- **Days not fineable** - The Patron Services parameter **Days not fineable** affects fine calculation. See [“Days Not Fineable”](#) on page 227.
- **Free days** - Patron Services parameters related to free days also affect fine calculation. See [“Free Days”](#) on page 227.
- **Fees** - The library may charge patrons for reasons unrelated to fines for overdue materials. For more information, see [“Defining Fee Descriptions”](#) on page 237.

Defining Fee Descriptions

Fees are charges that are unrelated to overdue fines. The Fee Descriptions policy table defines and standardizes fee descriptions. Entries in this policy table display as selections on workform views and dialog boxes where you deal with patron charges.

The Fee Descriptions policy table can be displayed only with the Administration Explorer. All organizations in a Polaris installation must agree on the fee descriptions. You can add and change entries in the Fee Descriptions policy table, but you cannot delete them.

Fee descriptions are created at the system and library levels, but the entries are assigned to the system. At the branch level, you can set which reasons are displayed to branch staff for selection and edit the description display text. You can also determine the order of the selections displayed. Some libraries prefer alphabetical order, other prefer to put the most commonly used selections first.



Note:

These System Administration permissions are required to modify this table:
Access administration: Allow, Access tables: Allow, Modify fee descriptions table: Allow.

1-2-3

Add a fee description entry

Follow these steps to add a fee description to the Fee Descriptions policy table.

Note:

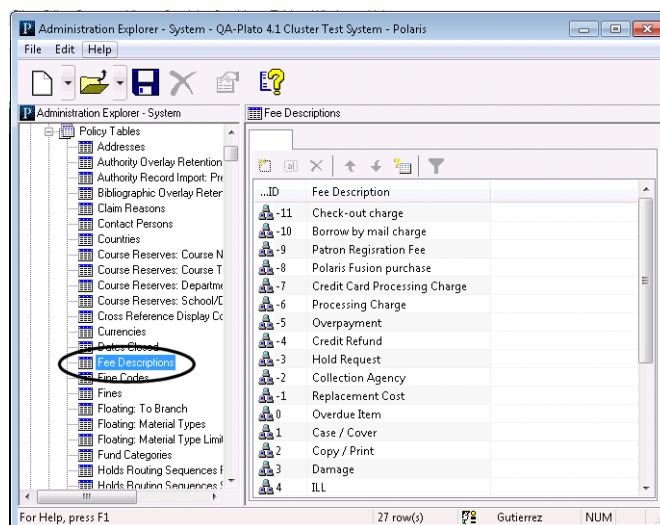
Check existing descriptions before you add a new one. You cannot delete duplicate descriptions.

1. In the Administration Explorer, open the **Policy Tables** folder for the organization, and select **Fee Descriptions**.

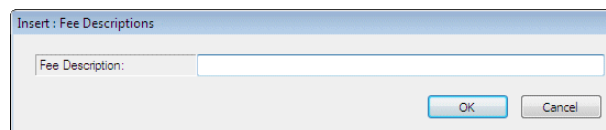
The Fee Descriptions table is displayed in the details view.

Note:

In the Fee Descriptions table, ID numbers preceded by a minus sign are supplied by the system and used in system processes.



2. Click  to display the Insert Fee Descriptions dialog box.



3. Type text describing the type of fee in the **Fee Description** box.
4. Click **OK** on the dialog box.

The Fee Descriptions policy table appears with the new fee description name. The status bar indicates that the modification is pending.

5. Select **File, Save** to save your changes.

The status bar indicates that the record is saved.

Related Information

- **Modify a table entry** - Select the entry, click , and change the description.

Important:

Any changes to an existing fee description are immediately applied to all records using the original fee. Descriptions should be maintained as is for accounting purposes, as long as charges using a description are kept on the patron records or are assigned an amount.

- **Set branch-level display** - See [“Set fee descriptions for branch-level display”](#) on page 239
- **Replacement fees** - You can set a default replacement fee amount and a processing fee amount for items the library cannot recover. See [“Setting Replacement Fee Defaults”](#) on page 241.

1-2-3

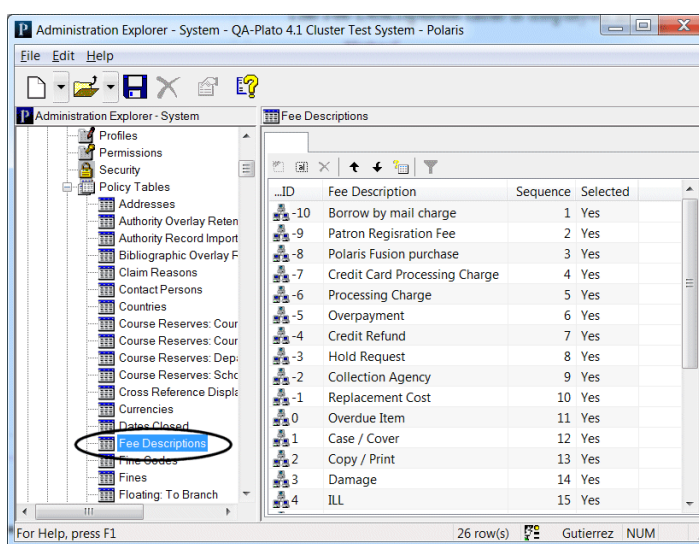
Set fee descriptions for branch-level display

Fee descriptions are displayed to staff for selection when the staff member adds a charge to the patron account.

Follow these steps to set the fee descriptions that should display to staff at a specific branch, edit the descriptions, and determine the order of entries in the fee reason list.

1. In the Administration Explorer, open the **Policy Tables** folder for the branch, and select **Fee Descriptions**.

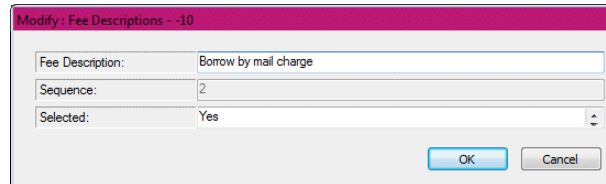
The Fee Descriptions table (branch-level version) is displayed in the details view. At the branch level, the table displays a **Selected** column, indicating whether an entry is displayed for staff selection, and a **Sequence** column, indicating the entry's position on the list of reasons.



2. To change an entry's display setting, select the entry and click  or double-click the entry.

For example, if the branch does not use Borrow by Mail, you may want to suppress **Borrow by mail charge** from display in the fee reasons list.

The Modify dialog box opens.



The dialog box titled "Modify : Fee Descriptions - -10" contains the following fields:

Fee Description:	Borrow by mail charge
Sequence:	2
Selected:	Yes

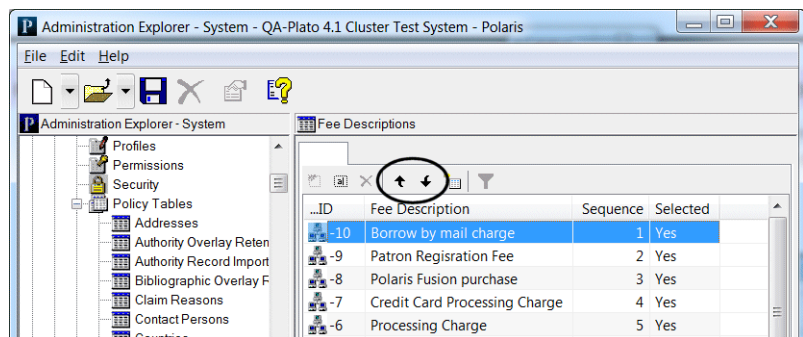
Buttons: OK, Cancel

3. Select **Yes** or **No** in the Selected box to display or suppress the fee reason.
4. To modify the description, type the new description in the **Fee Description** box.

Note:

The modified description is displayed only at the branch for which you made the setting. It is not changed at the system level.

5. Click **OK**.
6. To move an entry up or down in the selection list, select the entry and click the up or down arrow at the top of the table.



The screenshot shows the "Administration Explorer - System" window with the "Fee Descriptions" table selected. The table has columns: ...ID, Fee Description, Sequence, and Selected. The entry "Borrow by mail charge" (ID -10) is selected, and the up and down arrows at the top of the table are circled.

...ID	Fee Description	Sequence	Selected
-10	Borrow by mail charge	1	Yes
-9	Patron Registration Fee	2	Yes
-8	Polaris Fusion purchase	3	Yes
-7	Credit Card Processing Charge	4	Yes
-6	Processing Charge	5	Yes

7. Select **File, Save** to save your changes.

Setting Replacement Fee Defaults

When a patron must be charged to replace a lost, damaged, or long overdue item, Polaris can use the original price of the item or a default cost set by library policy. If the item's original price is unknown (the **Price** box on the Item Record workform is blank), the default replacement cost is used. (If the item's price was \$0.00, no replacement cost is charged.) You may choose to use the default replacement cost for every item, whether the original price is known or not. In addition, you can specify a processing fee that is added to the replacement cost. You can set separate replacement costs and processing fees for each material type.

The Patron Services parameter **Replacement fee options** controls default cost settings. You can set the parameter at the system level, library, or branch level. When an item is manually declared lost, or is automatically declared lost when it is billed, the **Replacement fee options** settings for the item's assigned branch are used. The settings for the governing branch for fine calculations are used to calculate the overdue fine, if any. See ["Governing Library for Circulation Transactions"](#) on page 209.

1-2-3

Set the replacement charge defaults

Follow these steps to set the defaults for item replacement charges.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Replacement fee options** to display the Replacement Fee Defaults dialog box.

Material Type	Replacement Cost	Processing Fee
Art	\$25.00	\$0.00
Audiobook	\$25.00	\$0.00
Book	\$25.00	\$0.00
Childrens Video	\$25.00	\$0.00
Equipment	\$25.00	\$0.00
Kit - Audiovisual	\$25.00	\$0.00
Kit - Reels	\$25.00	\$0.00
Manuscript	\$25.00	\$0.00
Map	\$25.00	\$0.00
Music	\$25.00	\$0.00
New / Popular Book	\$25.00	\$0.00
Periodical	\$25.00	\$0.00
Picture / Photo	\$25.00	\$0.00
Reels	\$25.00	\$0.00
Rental	\$25.00	\$0.00
Score	\$25.00	\$0.00
Software	\$25.00	\$0.00
Vertical File Material	\$25.00	\$0.00
Video	\$25.00	\$0.00

3. Choose how replacement charges should be calculated:
 - To use the original purchase price (if specified in the item record), click **Use item record price field or default**. If the original purchase price is not available for the calculation, the value specified in the **Replacement cost** field for the material type is used.
 - To always use the replacement cost for the material type, and ignore actual purchase prices, click **Use defaults only**.

Note:

If the original purchase price is specified in the item record as \$0.00 (the item was free), no replacement cost is charged.

4. For each material type, in the **Replacement Cost** field, type the standard replacement value that is specified by library policy.
5. For each material type, in the **Processing Fee** box, type the amount to charge a patron for processing a replacement item.
6. Click **OK** on the dialog box.

Overdue Fines on Lost Items

An item may be declared lost in the following situations:

- A patron notifies the library that a checked-out item is lost. Then a staff member manually declares the item lost.
- Billed items may be declared lost automatically, a system-level decision. (If they are not automatically declared lost, a staff member may manually declare a billed item lost.)

The Patron Services parameter **Lost item charge options** determines how overdue fines are handled at the time an item is billed and automatically set to lost, or when a staff member declares the item lost.

Most options controlled by the **Lost item charge options** parameter are available at the system, library, and branch levels. The governing library setting for fine calculation determines which library's settings rule lost item charges. For more information about governing library settings, see [“Governing Library for Circulation Transactions”](#) on page 209.

Settings for Lost Item Charge Options

The **Lost item charge options** parameter offers the following settings:

Overdues: billed items set to lost - System level only. Setting the item status to Lost at the time the item is billed will ensure the most consistent results for lost item recovery. However, leave this option unchecked if libraries in your system prefer to declare the item lost manually.

Charge overdue with bill - For best results, check this option if it is available (not grayed out). When this option is selected, the overdue charge is included in the bill regardless of whether the billed items are set to lost. If you prefer not to charge overdues with the bill, select the option **Charge overdue when returned**. The replacement fee and optional processing fee will still be billed.

Charge overdue when declared lost - Like **Charge overdue with bill**, this option is available only if **Charge overdue when returned** is not set. For best results, check this option if it is available. If the library does not charge overdues when items go to Lost as a matter of policy, the option **Charge overdue when returned** should be checked instead.

Charge overdue when returned - Select this option if the library policy is to charge the overdue fine only if and when the lost item is returned.

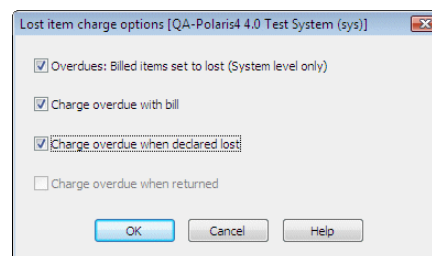
If you select this option but do *not* set **Overdues: billed items set to lost**, the library charges the overdue fine when a lost item is recovered but does not assume an item is lost until the patron comes in and says he cannot find it. In this situation, you will see the following effects:

- No automatic lost item recovery options are possible because the item's status is not Lost.
- The patron is billed for the replacement cost and optional processing fee. However, the overdue fine remains uncharged and unresolved.
- If the patron brings the item back, a staff member checks the item in and waives the replacement and optional processing fees. The overdue fine is calculated at that time and the staff member pays, waives, or charges the overdue fine.
- If the patron says he cannot find the item, the staff member declares the item lost on the Patron Status workform - Items out view, then pays, waives or leaves the replacement and optional processing fees; the overdue is calculated at that time. The item is now lost, so lost item recovery options may apply (see "[Setting Lost Item Recovery Defaults](#)" on page 248). (If the staff member does not declare the item lost, it stays out to the patron until checked in and the overdue fine is calculated at that time.)

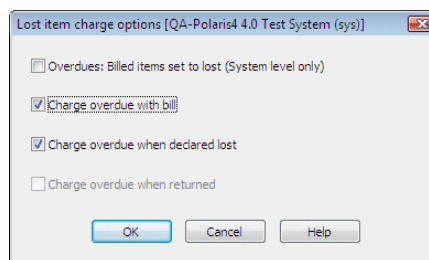
Policy Decisions for Lost Item Charge Options

Different combinations of settings reflect your library's policy:

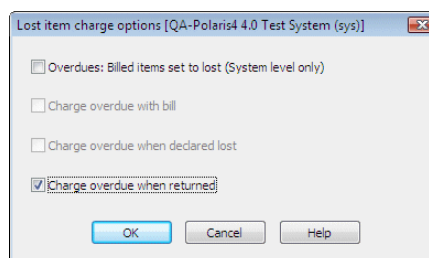
- If you want to include overdue fines with the bill, and billed items are automatically set to lost, select (check) the following options:
 - **Overdues: billed items set to lost** (system level only)
 - **Charge overdue with bill**
 - **Charge overdue when declared lost**



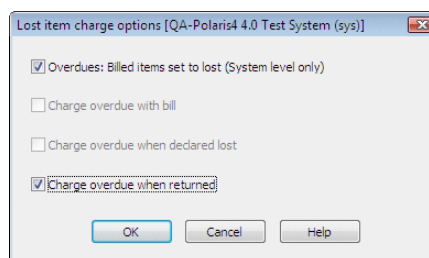
- If you want to include overdue fines with the bill, and billed items are not automatically set to lost, select (check) the following options:
 - **Charge overdue with bill**
 - **Charge overdue when declared lost**



- If you want to charge overdue fines when an item is returned, and billed items are not automatically set to lost, select (check) **Charge overdue when returned**.



- If you want to charge overdue fines when an item is returned, and billed items are automatically set to lost, select (check) the following options:
 - **Overdues: billed items set to lost (system level only)**
 - **Charge overdue when returned**

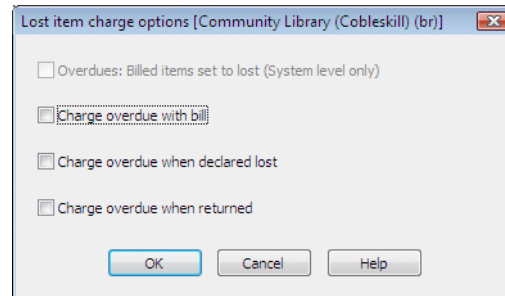


1-2-3

Set lost item charge options

Follow these steps to set whether billed items are automatically set to Lost (system level only), and how to handle overdue charges on billed and lost items.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Lost item charge options** to display the Lost item charge options dialog box.

**Tip:**

See “[Policy Decisions for Lost Item Charge Options](#)” on page 244 for suggested combinations of settings in this dialog box.

3. (System level only) Select (check) **Overdues: billed items set to lost** to make the status of billed items automatically set to Lost.

Note:

Set this parameter to **Yes** if you use collection agency services. This ensures that if a lost item is recovered, the system reports the recovery correctly.

4. To charge overdue fines when an item’s status changes to lost, select one or both of the following options:
 - **Charge overdue with bill** - If **Overdues: billed items set to lost** is selected for the system, when the billed item’s status automatically changes to Lost the overdue charge is placed on the patron account, along with other appropriate charges related to lost items (see “[Setting Replacement Fee Defaults](#)” on page 241). If **Overdues: billed items set to lost** is *not* selected for the system, the billed item’s status remains Out. The overdue charge and any other charges related to billed items are placed on the patron account.
 - **Charge overdue when declared lost** - Select (check) this option to charge overdue fines to the patron account when an item is declared lost by a staff member.

Tip:

When **Charge overdue when returned** is selected, replacement costs are charged immediately when the item's status changes to Lost, but not overdue fines. If your library uses a collection agency, the patron would be reported only for the total replacement costs. (However, any overdue fines already owed would be included in the collection agency calculation.)

5. To charge overdue fines to the patron account when a lost item is recovered at circulation, instead of when the item's status changes to Lost, select **Charge overdue when returned**.

Note:

If you select **Charge overdue with bill**, **Charge overdue when declared lost**, or both, this option is unavailable.

Libraries that use this option typically charge any replacement and processing fees to the patron when the item's status changes to Lost, but not overdue charges. If the item is recovered, replacement and processing fees are then waived or credited (if already paid), the overdue fine is calculated up to the point when the item was returned, up to the maximum fine amount, and the overdue charge is placed on the patron account.

Important:

If you select **Charge overdue when returned**, set the **Lost item recovery** parameter for lost-and-paid items to **Charge** for overdues. See ["Set the lost item recovery default actions"](#) on page 249.

6. Click **OK**.

Related Information

- **Charge resolution when lost items are recovered** - See ["Setting Lost Item Recovery Defaults"](#) on page 248.
- **Bills** - See ["Overdue Notices, Bills, and Combined Notices"](#) on page 413.
- **Overdue fines on lost items in estimated fines** - See ["Set up estimate accrued fine calculations and blocking"](#) on page 346.

Setting Lost Item Recovery Defaults

When a lost item is recovered at check out or check in, the charges associated with the item must be resolved (charged, waived, credited, or left as is, as appropriate). With the Patron Services parameter **Lost item recovery**, you can set the default actions so that the charges are resolved automatically when lost items are recovered at circulation, and staff members do not have to resolve each item manually. Charges for lost items may include a replacement charge, a processing fee, and an overdue charge. You can set up separate resolutions depending on whether the charges have been paid or remain unpaid.

The governing library setting for lost item recovery (transacting library or lending library) determines which library's settings rule when a lost item is recovered at circulation. The governing library for fines determines how the overdue charges are calculated. For more information about governing library settings, see [“Governing Library for Circulation Transactions”](#) on page 209. The replacement charge and processing fee are calculated according to the settings for the item's assigned branch. See [“Setting Replacement Fee Defaults”](#) on page 241.

You can set separate default actions for normal check in, bulk check in, and check out. Your settings determine how lost items are resolved in the online staff client and in the following situations:

- **Offline circulation** - Uses check-out and normal check-in settings.
- **Polaris ExpressCheck** - If you have set Polaris ExpressCheck to permit check out of lost items, your settings for normal check out are used. For information about Polaris ExpressCheck settings, see the *Polaris ExpressCheck Administration Guide*.

Note:

SIP/NCIP circulation does not support default settings, and returns error messages for lost items.

1-2-3

Set the lost item recovery default actions

Follow these steps to set the automatic actions for resolving the charges associated with lost items when they are recovered at circulation.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Lost item recovery** to display the Lost Item Recovery Options dialog box.

The dialog box opens with the **Lost Item Recovery** tab selected.

	Auto waive/charge lost item fees	Overdue fine	Processing fee	Replacement cost
Check-in: Bulk mode	☐			
Check-in: Normal mode	☐			
Check-out	☐			

3. On the **Lost Item Recovery** tabbed page, set the processing defaults that should apply when lost items are recovered at circulation, but the charges related to the items *have not been paid or waived*:
 - a) In the **Default action if recovered in** fields, specify the maximum time period for which automatic changes to the patron account should apply.

For any specific item, the period you specify is measured from the point when the item was declared lost. The maximum numerical value is 999 (months or years).

Important:

This feature depends on the availability of patron ID information. If your organization purges patron ID information from transactions after a set period of time, be sure to coordinate the settings so that the patron ID is available if the lost item is recovered within the time period you specify. See ["Removing Patron ID Information from Transaction Files"](#) on page 79.

- b) Select the check box for each circulation situation (normal check in, bulk check in, and check out) where you want to charge or waive lost item fees automatically.

If a lost item is recovered in one of the circulation situations you selected before the time specified in the **Default action if recovered in** fields, fees are charged or waived automatically according to your settings. If the item is recovered after the specified time, the circulation transaction continues but no changes are made to the patron account.

If you do not select a circulation situation, automatic processing is not applied, and staff members must resolve the charges when a lost item is recovered in that situation. See [“Resolve a lost-and-unpaid item at circulation”](#) in the *Polaris Patron Services Guide 4.1R2*.

- c) For each circulation situation that you checked, select the automatic action to take for each fee (**Overdue fine**, **Processing fee**, and **Replacement cost**):
- **Charge** - This option leaves the charge related to the lost item unchanged in the patron account.
 - **Waive** - This option waives the charge in the patron account. For overdues, the charge is placed in the patron account and then automatically waived.

The patron’s Account Transaction Summary will be updated according to the action you specify.

Note:

For more information about setting replacement costs and processing fees, see [“Setting Replacement Fee Defaults”](#) on page 241.

4. Click the **Lost-and-paid recovery** tab, and set the processing defaults that should apply when lost items are recovered at circulation, and the charges related to the items *have already been paid*:

	Auto credit lost item fees	Overdue fine	Processing fee	Replacement cost
Check-in: Bulk mode	☐	▼	▼	▼
Check-in: Normal mode	☐	▼	▼	▼
Check-out	☐	▼	▼	▼

- a) In the **Default action if recovered in** fields, specify the maximum time period for which automatic processing should apply.

For any specific item, the period you specify is measured from the point when the item was declared lost. The maximum numerical value is 999 (months or years).

Important:

This feature depends on the availability of patron ID information. If your organization purges patron ID information from transactions after a set period of time, be sure to coordinate the settings so that the patron ID is available if the lost item is recovered within the time period you specify. See [“Removing Patron ID Information from Transaction Files”](#) on page 79.

- b) Select the check box for each circulation situation (normal check-in, bulk check-in, and check-out) where you want to credit lost item fees or leave them as is automatically.

If a lost item is recovered before the time specified in the **Default action if recovered in** fields, in one of the circulation situations you selected, payments are credited or left as is automatically according to your settings. If the item is recovered after the specified time, the circulation transaction continues but no changes are made to the patron account.

If you do not select a circulation situation, automatic processing is not applied, and staff members must resolve the account when a lost item is recovered in that situation. See [“Resolve a lost-and-paid item at circulation”](#) in the *Polaris Patron Services Guide 4.1R2*.

- c) For each circulation situation that you checked, select the automatic action to take for each fee (**Overdue fine**, **Processing fee**, and **Replacement cost**):
- **Charge** - For overdue fines only. This option charges overdue fines to the patron’s account calculated from when the item went overdue to the day it was recovered. Libraries that set the **Lost item: Charge overdue when returned** parameter (see [“Set lost item charge options”](#) on page 246) typically charge any replacement and processing fees to the patron when the item’s status changes to Lost, but not overdue charges. If the item is recovered, replacement and processing fees are then waived or credited (if already paid), the overdue fine is calculated up to the point when the item was returned, up to the maximum fine amount, and the overdue charge is placed on the patron account.
 - **Credit** - This option credits the patron’s account for the payment amount related to the lost item. If an amount was partially paid, the paid amount is credited and the unpaid balance is waived. For libraries that use PayPal Payflow Pro credit card processing in the staff client, PAC, or Polaris ExpressCheck, if the payment was made by credit card, the credit is issued to the credit card account.
 - **Leave as is** - This option leaves the transactions related to the lost item unchanged in the patron account.

The patron’s Account Transaction Summary will be updated according to the action you specify.

Related Information

Separate settings control whether overdue fines are charged when an item is declared lost, when an item’s status is automatically changed to lost when it is billed, or when a lost item is recovered at circulation. See [“Overdue Fines on Lost Items”](#) on page 243.

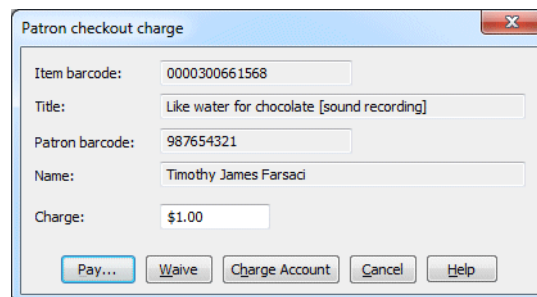
Charging for Checkout and Renewal

You can charge patrons for checking out items of specified material types and optionally charge for renewing them, or charge only for renewal. You can also choose to waive the charge for certain patron codes. The charge policy is applied according to the settings of item's assigned branch. Your renewal settings also apply to Polaris PowerPAC, Mobile PAC and renewals made through inbound telephony. Separate settings determine how the charge policy affects transactions at Polaris ExpressCheck and SIP self-check workstations.

Staff Client Transactions

For staff client transactions, you can optionally display a prompt regarding charges during checkout and renewal as appropriate. You might also consider placing physical labels on your chargeable items so that patrons know there is a charge before they reach the circulation desk.

When a chargeable item is scanned at check-out or selected for renewal, the system first for item blocks, holds, and patron item limits. Then, if you have set the system to display a prompt, a Patron check-out charge dialog box is displayed.

A screenshot of a software dialog box titled "Patron checkout charge". The dialog box has a light blue header bar with a close button (X) in the top right corner. The main area contains several input fields: "Item barcode:" with the value "0000300661568", "Title:" with the value "Like water for chocolate [sound recording]", "Patron barcode:" with the value "987654321", "Name:" with the value "Timothy James Farsad", and "Charge:" with the value "\$1.00". At the bottom of the dialog box, there are five buttons: "Pay...", "Waive", "Charge Account", "Cancel", and "Help".

The staff member can choose to charge the patron's account and continue the check-out, pay the charge, waive the charge, or cancel the transaction. The appropriate permissions are required to pay or waive the charge. If the staff member chooses to pay the charge, a standard Pay dialog box is displayed. The Charge for Check-out dialog box also appears during bulk check-out of Borrow by Mail or Outreach Services items. If you have chosen not to display the prompt, the charge is automatically applied to the patron account. Check-out charges are not listed on the check-out receipt. If the same item is checked out again to the same patron before the library closes, the patron is not charged again.

Renewal from the Check Out workform follows a similar process, if the option to charge at renewal is set for the item's assigned branch. If the item is overdue and the option to charge the overdue when returned is enabled, the prompt for the overdue appears before the Patron checkout charge dialog box. The charge is written to the patron account only if the item renewal is completed. Renewal from the Patron Status workform - Items Out view is similar. If multiple items are selected for renewal, the Patron checkout charge dialog box is displayed for each item as appropriate.

When a chargeable item is checked out offline, the charge is applied to the patron account and a message is written to the upload log file.

Note:

In systems that use floating collections, the chargeable settings for an item change as the item's assigned branch changes.

The Patron Status workform - Account view lists check-out charges. The organization listed with the charge is the item's assigned branch. The charges are also listed on the PAC My Account - Fines & Fees page.

PAC Display

- **Item availability display** - The PAC item availability display includes an icon  next to an item if the item's assigned branch has defined the item's material type as chargeable.
- **Courtesy message for hold requests** - When a patron places a bibliographic-level hold request in PAC, and at least one item eligible to fill the request would incur a check-out charge, a courtesy message is displayed. Note that the request may actually be filled by a non-chargeable item, depending on which items trap for the request. If after the request is placed new items become available from a branch that does not charge for checkout, or holds policies change, the message may no longer be accurate. It is a courtesy message only. You can edit the message in Polaris Language Editor (WebAdmin):
 - For PowerPAC, the default message is **If your request is filled you may be charged to check out the item according to the policy of the library owning the item. Do you want to place this request?** The Polaris Language Editor string ID is **PACML_CHARGECKOREQ**.
 - For Mobile PAC, the default message is **If your request is filled you may be charged to check out the item according to the policy of the library owning the item. Do you want to place this request?** The Polaris Language Editor string ID is **MP_MSG_HOLDS_CHARGE_WARNING**.

Renewing Items From PAC

If renewing an item is chargeable according to the settings of the item's assigned branch, a message is displayed when the patron attempts to renew the item from the patron account. The patron can choose whether to continue or cancel the renewal. The default messages can be edited in Polaris Language Editor (WebAdmin).

<i>PowerPAC String ID</i>	<i>Default Message</i>
PACML_CHARGE_RENEW	There is a charge to renew this item.
PACML_CHARGE_RENEW_MULTIPLE	There is a charge to renew the following items.
PACML_RENEWITEMS_1347	If you renew these items your account will be charged
PACML_RENEWITEMS_1348	To accept these charges and continue with the renewal, press 'OK'.
PACML_RENEWITEMS_1349	Your account has been charged.

<i>Mobile PAC String ID</i>	<i>Default Message</i>
MP_MSG_ITEMSOUT_CHECKOUT_CHARGE_WARNING	There is a charge of {0} to renew this item. Your account will be charged. Do you want to accept this charge?
MP_MSG_ITEMSOUT_CHECKOUT_CHARGE	Your account has been charged.

Phone Renewal

The Polaris Phone Attendant also supports charges for item renewals, according to the policies of the item's assigned branch. The patron is notified of any renewal charges and prompted to accept them. If both overdue and renewal charges will be applied, the notification is combined in a single message. If the patron chooses to renew all items at once (option #6), a status message informs the patron that the "renew all" process is underway, since the process may take a few seconds to gather information. In Polaris Language Editor (WebAdmin), the following language strings define these messages:

<i>String ID</i>	<i>Default Message</i>
PA_TEXT_PATREC_RENEWITEMS_CHARGE	Your account will be charged \$%3.2f to renew these items.
PA_TEXT_PATREC_RENEWITEM_CHARGE	Your account will be charged \$%3.2f to renew this item.
PA_TEXT_PATREC_RENEWITEM_OVDANDCHARGES	Overdue and renewal charges will apply. Your account will be charged \$%3.2f.
PA_TEXT_PATREC_RENEW_WAIT	Please wait while we process your renewals.

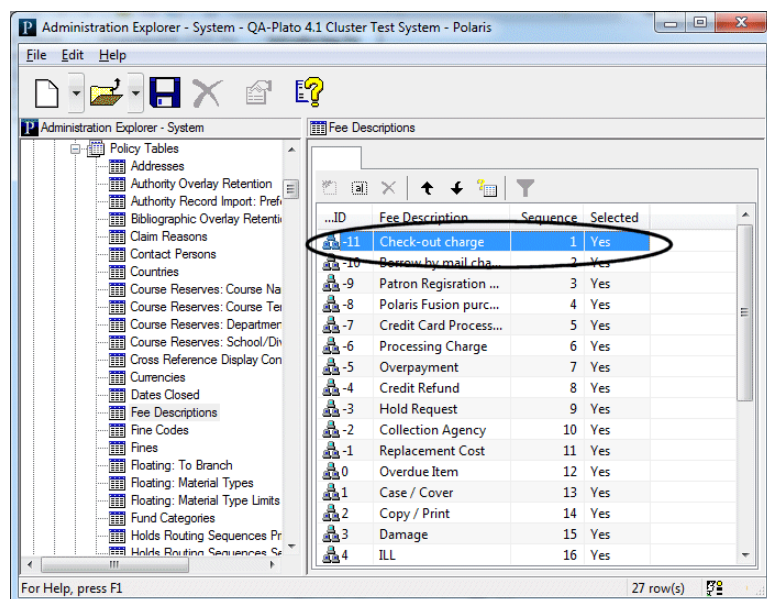
1-2-3

Set up charges for checkout and renewal

Follow these steps to set up charges for checkout and renewal.

1. Enable the fee description in Polaris Administration:
 - a) Open the Fee Descriptions policy table for the organization that is setting up check-out or renewal charge policies.
 - b) Set the fee description **Item charge for check-out/renewal** to **Yes**.

This setting displays the fee description on views and dialog boxes that list charges on the patron account. The charge transactions are logged with the Fee Description code -11. They are included in all Polaris toolbar reports of charge transactions and are available for reporting in Polaris SimplyReports.

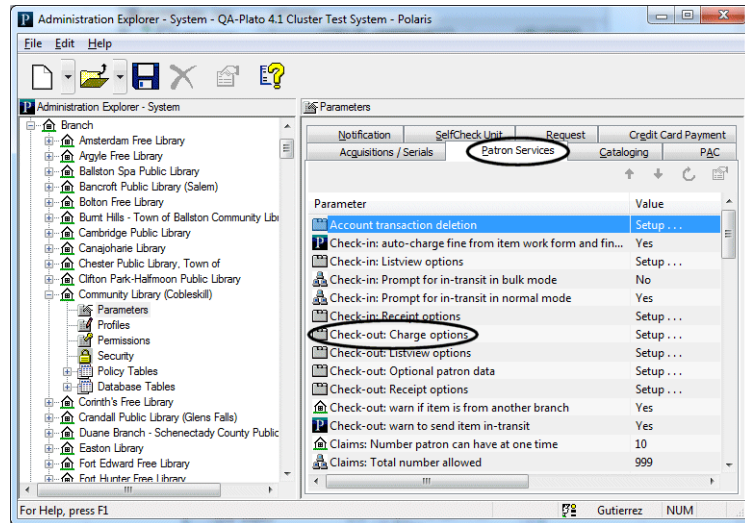


- c) Select **File, Save**.

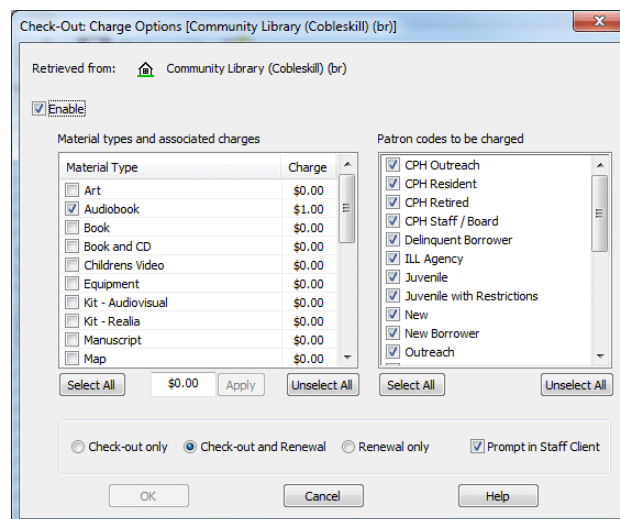
For more information about working with this table, see “[Defining Fee Descriptions](#)” on page 237.

2. Double-click the Patron Services parameter **Check-out: Charge options** to enable the charge and specify the appropriate material types, charge amounts, and patron codes.

The parameter is available at the system, library, and branch levels.



The Check Out: Charge options dialog box opens.



3. Select (check) **Enable**.
4. Select (check) a material type to which a check-out charge should be applied.
5. Specify the amount to be charged for the selected material type and click **Apply**.

You can also click several material types or **Select All**, specify a single amount, and click **Apply**.

Note:

It is possible to select a material type and leave the amount at \$0.00, or to set an amount for a selected material type and then uncheck that material type. In either case, no charge will be applied.

6. Select (check) the patron codes that should be charged the specified check-out charges.

You can also click **Select All**.

7. Select one option for applying charges:
 - **Check-out only** - Apply the charge only at check-out
 - **Check-out and Renewal** - Apply the charge at check-out and again if the item is renewed
 - **Renewal only** - Apply the charge only when the item is renewed
8. If you want a message to appear when a staff member attempts to check out or renew a chargeable item to a patron, select (check) **Prompt in Staff Client**. For this option, the system uses the setting of the transacting workstation's log-on branch.
9. Click **OK**.

Related Information

- **Polaris ExpressCheck transactions** - Your charge policies also apply to checkout and renewal from Polaris ExpressCheck. You can choose to allow the transactions and have the patron's account charged appropriately when the transactions occur, or stop the transactions and display a message. The option is available in the SelfCheck unit parameter **Polaris ExpressCheck: Blocking conditions** (Item Blocks tabbed page). For more information, see the *Polaris ExpressCheck Administration Guide*.
- **SIP Self-Check transactions** - Your charge policies also apply to checkout and renewal from SIP self-check units. You can choose to allow checkout and have the patron's account charged appropriately when the transactions occur, allow renewal and have the patron's account charged, automatically charge when the patron chooses to renew all items out, or stop the transactions and display a message. For more information, see "[Setting Up SIP Self-Check Circulation](#)" on page 451.

Managing Collection Agency Services



Your library may contract with a collection agency to encourage patrons to pay their fines or return borrowed items. Delinquent accounts are reported to the collection agency automatically, and the patron records automatically updated, according to settings you make in Polaris Administration.

Note:

Polaris Library Systems charges a modest annual site license fee to use the collection agency interface in Polaris. Contact your Site Manager at Polaris Library Systems for additional information.

See the following topics:

- [“Using a Collection Agency”](#) on page 260
- [“Collection Processing Reports”](#) on page 274

Using a Collection Agency

Collection agencies differ in notification practices and in how repayment is obtained. Some collection agencies, such as Unique Management Services (UMS), manage all collection communications with patrons who have delinquent accounts, but the patrons make all payments directly to the library. For other collection agencies, the library may send a fine notice warning the patron that the account will be turned over to collection. Once the account is turned over, patrons may make payments to the collection agency as well as to the library. Your library's contract with the collection agency determines the cost to the library for collection agency services. To recoup some of these costs, you can set a collection fee on delinquent patron accounts.

Regardless of communication and payment methods, collection agency services rely on the automatic reporting capabilities of Polaris. Polaris automatically transmits a Submission Report of delinquent patron information and an Update Report of patron account activity to the collection agency, via e-mail, FTP, or both. You can have Polaris send copies of the reports to a library staff member for verification and backup. In addition, a Synchronization Report lists all currently reported patrons with their balances. You can run this report manually, any time.

A patron's account is considered delinquent and is included on the Submission Report when all the following conditions exist:

- The patron owes an amount of money over a library-defined limit.
- The money has been owed longer than a library-specified period of time.
- The specific patron has not been excluded from collection reporting (the **Exclude from collection agency** check box is not selected on the Patron Registration workform - General view).
- The patron code in the patron record has not been excluded from collection reporting.

The total amount reported may include charges of all types, replacement costs, processing fees, and collection fees. Or, you can opt to report patron accounts based only on lost item charges (see [“Reporting for Lost Item Charges Only”](#) on page 261).

Accrued overdue fines that have not yet been charged are not included in the calculation for reporting to a collection agency. See the section [“Calculating and Blocking for Estimated Accrued Fines”](#) [“Calculating and Blocking for Estimated Accrued Fines”](#) on page 340.

The following events occur during collection agency processing:

- After collection agency functions are started, the system identifies delinquent patrons. The Submission Report is produced during overnight batch processing and is sent to the collection agency by e-mail or FTP. The report includes all patron accounts that match the criteria you set in Polaris Administration. See [“Collection Processing Reports”](#) on page 274.
- A system-generated collection block and collection fee (if specified) is automatically added to the patron record. Only staff members with the system-level Circulation permission **Override collection agency block: Allow** can override the block.
- The collection agency encourages the patron to settle with the library, or collects money directly from patrons and transmits it to the library.
- The patron pays all participating libraries all the money that is owed, including fines and collection fees incurred after being reported to the collection agency. When the patron no longer owes money to the reporting libraries, the patron’s account is out of collection. (The patron may still owe money to non-participating libraries.) The block is automatically removed from the patron’s account, and the patron’s account is considered to be out of collection.

Note:

If the patron’s account is not paid down to \$0.00 at all the participating organizations, the patron’s account is still in collection. If the patron’s account is paid down to \$0.00 after submission to collection, but the patron incurs a new fine before the Update Report is generated, the patron’s account is still in collection.

- The Update Report is generated during overnight batch processing, and is sent to the collection agency by e-mail or FTP. The report includes all patrons who have been identified for collection and have had any activity (payment, waiver, or new charge) at the reporting organization since the last report, either the Submission Report or Update Report, was generated.

Note:

You can manually remove a patron’s account from collection. See [“Remove a patron account from collection”](#) in the *Polaris Patron Services Guide 4.1R2*. However, the action is not included in any automatic collection agency reports. *If a patron’s account is manually removed from collection, you must inform the collection agency.*

Reporting for Lost Item Charges Only

Patron accounts can be sent to collection based only on lost item charges (combined replacement and processing fees). No other charges are included when determining if the patron account should be reported. However, if the patron account does qualify for reporting based on lost item fees, the total amount owed, including all charges such as overdue fines or printing, is sent to the agency. Similarly, after a patron account is submitted to the collection agency, all new charges of any type are included in the Update Report, not just lost item fees.

A patron account is sent to collection based on a threshold amount you specify. If you set the “item fees only” option, the calculation to determine if the patron meets the minimum balance for reporting is based only on combined replacement and processing fee charges. For example, if the threshold amount is \$25:

- A patron who owes \$30 in combined replacement cost and processing charges for lost items will be reported to the collection agency. If this patron owes an additional \$10 in overdue fines, making his total owed \$40, when the account is submitted to the agency his amount owed will be \$40, and the account will not be cleared until the balance is \$0.
- A patron who owes \$20 in combined replacement cost and processing charges and \$10 in overdue fines will not be reported.

The “item fees only” option is available only at the system level. If selected, it affects all calculations to determine if a patron account qualifies for reporting, regardless of the **Reporting Level** setting (System, Library, Branch) or **Reporting By** setting (Patron Branch, Item Branch, Loaning Branch). See [“Set up collection agency processing”](#) on page 266.

Note:

When you set the “item fees only” option, calculations for new collection agency submissions from that point on will be affected. Patron accounts reported under previous rules are not affected.

Reporting Minors

Polaris identifies patrons under the age of 18 from the **Birth date** field in the patron record. You can specify a guardian for collection purposes by setting up a user-defined field (UDF) for the guardian’s patron barcode. See [“User-Defined Fields in Patron Records”](#) on page 35. In this case, the Submission Report to the collection agency lists the guardian’s address and telephone numbers for collection purposes. If you use library-generated fine notices, the message regarding the minor’s delinquent account is addressed to the minor, in care of the guardian, at the guardian’s address. If the patron’s record does not include a birth date, but does contain a UDF with a valid patron barcode, the patron is reported as a minor. If the system cannot identify the UDF barcode as a patron, the delinquent patron is reported on her own behalf (not as a minor).

Important:

Polaris Library Systems sets up user-defined fields at implementation. If you plan to use collection agency services, and you want to specify a UDF to use for the guardian barcode, you must have Polaris Library Systems set up the UDF.

Collection Agency Reporting via FTP

You can transmit Submission and Update reports to your collection agency via FTP (File Transfer Protocol), instead of or in addition to e-mail.

FTP is a method of sending data files to (or retrieving them from) specified locations on remote servers. In Polaris Administration, the library specifies the FTP address on the collection agency server. When the process runs, the Submission and Update files are automatically placed on the remote server.

Depending on the collection agency's requirements, the FTP file location for multiple branches may require individual folders for each branch or library, or a single folder containing the data files from all locations. For example, UMS prefers a single folder since the files for individual branches are distinguished by file name.

Secure FTP and Third-Party FTP software

Polaris also supports SFTP (Secure FTP), a secure way to transmit the data. If the library chooses to use SFTP, you must install a third-party SFTP program on the library network. You can also use third-party FTP software that does not support SFTP. In either case, you specify the program executable and any associated parameters in Polaris Administration.

Note:

Some networks may have restrictions on FTP or on file sizes, and there may be firewall settings that prevent FTP. The library is responsible for clearing the way for FTP on the local network.

Active FTP

Some collection agencies may support Active FTP. Active FTP allows the remote service to initiate the connection to begin the transfer. However, the firewall on some networks will not allow this, so Passive mode is used. If the remote server accepts Active FTP, you can select the option in your Polaris Administration setup. As with Passive mode, the remote service will need to provide the parameters necessary to connect via Active FTP.

E-Mail Summary

The Polaris Administration e-mail setup for collection agency processing includes an option to send an e-mail summary only. When this option is selected, the program sends a summary to the specified e-mail addresses instead of a full report. The summary e-mail includes the summary data normally included in the full report. (This summary data is not included in the FTP files.) The header of the summary includes a mapping of the UDFs included in the files. The summary option should be used in connection with FTP transmission to alert the designated recipients that the reporting process ran.

Important:

The e-mail summary option is intended to be used with the FTP option. If the library sends files to the agency via e-mail but does not use FTP, do not select this option.

The e-mail summary feature is also valuable if there are transmission errors. If the FTP transmission fails for any reason, the summary e-mail message indicates that the process failed. The message includes the filename of the document to be sent and a reason for the failure, if one can be determined.

Sending the Files

When you enable FTP transmission, the Submission and Update reports are automatically sent to the designated file location, and a copy of the report file is automatically saved to a local directory on your server:

`\\[Polaris Data Path]\\[Version No.]\\Logs\\SSIS\\CollectionAgency\\Reports`

If you report by branch or library, each location has a subdirectory:
`SSIS\\CollectionAgency\\Reports\\AMS-3`

Note:

If both e-mail and FTP output options are selected, only one copy is sent to the local directory.

Setting Up FTP Transmission in Polaris Administration

Before you begin setting up FTP transmission in Polaris Administration, contact your collection agency to determine the following:

- FTP server location
- FTP port
- FTP folder name
- Your user name and password for the agency's FTP server

See [“Set up collection agency processing”](#) on page 266 for information about the setup in Polaris Administration.

1-2-3

Set up collection agency prerequisites

Follow these steps to prepare to use collection agency services with Polaris.

1. Enable collection agency processing:
 - Contact Polaris Library Systems to make the collection agency functionality available in Polaris, and tell Polaris Library Systems which agency you will be using.
 - Set up a contract with the collection agency. Establish a reporting schedule, transmittal method (e-mail or FTP), and destination information for the reports.
2. If the library will send fine notices to warn delinquent patrons about collection, set up the fine notice (see [“Fine Notices”](#) on page 428).

Note:

This step is not applicable if you use UMS.

3. If the library wants the fine notice and collection communications to go to the guardian of a minor patron, have Polaris Library Systems set up a UDF in Polaris Administration for the guardian barcode (see [“Reporting Minors”](#) on page 262).

Note:

This step is not applicable if you use UMS.

4. To be sure the system reports the recovery of lost items correctly, set the Patron Services parameter **Overdues: Billed items set to lost** to **Yes**.
5. Be sure that the SQL job is set up properly before you start collection agency processing:
 - In SQL Enterprise Manager, check that the SQL Server job **Polaris_Collection** is scheduled properly and enabled. The schedule should not interfere with other running jobs.
 - Check that a valid path is set for the SQL Server job **Polaris_Collection** output file, and that entries are appended into it.
 - Be sure an error file is set up for the SSIS package **Polaris_Collection**.

Note:

Polaris Library Systems can assist you with this step. Contact your Polaris Site Manager.

Related Information

Set collection agency reporting criteria, thresholds, and schedules - See [“Set up collection agency processing”](#) on page 266.

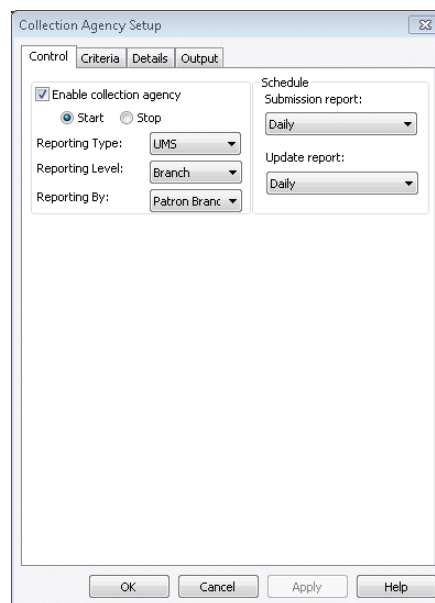
1-2-3

Set up collection agency processing

You can set up collection agency processing independently at the system, library, and branch levels. This means that individual libraries and branches can choose not to participate in collection services, or they can use different thresholds. It is recommended that your entire library system use a single system-wide setup, but if you need branch-specific settings, you can open the **Collection agency options** parameter at the system level, set the defaults, and then change them as needed at the branch level. Follow these steps to set up collection agency processing.

1. In the Administration Explorer tree view, select **Parameters** for the system, and click the **Patron Services** tab in the details view.
2. Double-click **Collection agency options**.

The Collection Agency Setup dialog box appears. The Control tabbed page is selected.



3. Select (check) **Enable collection agency**.

Important:

If you clear (uncheck) the **Enable collection agency** check box after reporting has begun, you receive a warning message. If you continue, any collection agency blocks in patron records are cleared but the collection agency fee is not cleared. Then, if you check **Enable collection agency** again, the patron accounts are put back in collection and duplicate collection fees are placed on their accounts. Anyone who has paid amounts so the balance is under the threshold, but not down to 0.00, is not included. *If you want to stop reporting for a period of time, click Stop.*

4. Choose one of the following options:
 - To start using the collection agency function after completing the setup, click **Start**.

Important:
Be sure that the SQL job is set up properly before you set processing to **Start**. See ["Set up collection agency prerequisites"](#) on page 264.

 - To stop collection agency reporting, click **Stop**. This option does not remove patron accounts from collection; it suspends reporting. (When you are ready to begin, click **Start**.)
5. Choose one of the following options in the **Reporting Type** box:
 - **UMS** - Select this option if your collection agency is UMS (Unique Management Services).
 - **Other** - Select this option if you use an agency other than UMS.

Note:
This option controls the automatic reports that Polaris transmits to the collection agency. Polaris Library Systems configures the automatic reports for the appropriate agency.
6. Choose one of the following options in the **Reporting Level** box:
 - Select **System** if all institutions in the Polaris system use collection services and agree on the same settings. This makes the Collection Agency Setup dialog box unavailable at subordinate levels.
 - Select **Library** if the settings must be unique for libraries in a consortium. You also use this setting if some libraries do not want to use collection services. This makes the Collection Agency Setup dialog box unavailable at the branch level.
 - Select **Branch** if the settings must be unique for individual branches. The settings for the system level are the default settings for all branches. You change the settings for each branch at the branch level.
7. (System level only) Choose one of the following options in the **Reporting By** box:
 - **Item Branch** - Default. Reporting is based on the collection policies of the item's assigned branch or the branch to which the patron owes money for other types of charges. This setting reports all patrons who owe money to the branch, regardless of the patrons' registered branches. A patron account may be reported by more than one branch if the patron owes money to more than one.

- **Patron Branch** - Reporting is based on the collection policies of the patron's registered branch. The patron account is reported for all sums owed (the amount in the **Charges** field of the patron account workform). This setting reports only patrons registered at the reporting branch, regardless of which branch the patron owes. A patron account is never reported by more than one branch. If the patron's registered branch does not use Collection Agency, the patron account is never reported. If the **Reporting Level** is set to **System**, all patrons are eligible for reporting. If the **Reporting Level** is set to **Library**, all patrons registered at branches linked to a library that has enabled Collection Agency are eligible for reporting.

Important:

Reporting by patron's branch will report patrons for the total amount owed to any other branch *only if* the reporting level is set to **System** (see step 6). If the reporting level is set to **Branch**, then the patrons are only reported for money owed to their own branch, even if they owe money at other branches.

- **Loaning branch** - Reporting is based on the collection policies of the item's transacting (check-out) branch. In this case it is possible for a patron to be reported by different branches and incur multiple collection fees if the patron has delinquent fines and fees at several different branches.

Note:

The **Reporting by** setting does not affect fine calculation. The governing library for fines determines how the amount is calculated. Nothing prevents a library from calculating fines based on item branch and reporting for collection agency by patron branch. See ["Governing Library for Circulation Transactions"](#) on page 209. Also, if you send fine notices, set the notification library to **Patron's branch** to be sure the fine information is consistent with what will be reported to the collection agency. See ["Fine Notices"](#) on page 428.

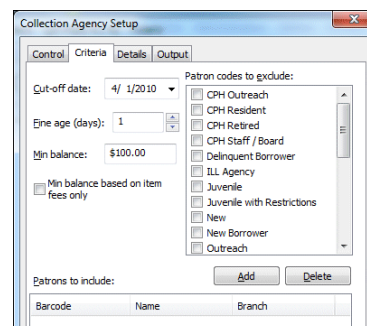
8. Specify how often reports are sent from Polaris to the collection agency by selecting an interval in the following boxes:

- **Submission**
- **Update**

Note:

For more information about these reports, see ["Collection Processing Reports"](#) on page 274. Check with the collection agency for the best settings to use.

9. Click the **Criteria** tab to set the criteria by which patron records are sent to collections.



Tip:

To include all fines in the total amount required for reporting, specify a cut-off date in the remote past.

- a) Specify a date in the **Cut-off date** box for a fine to be considered in the delinquent balance. Fines incurred before this date are not considered when calculating the patron's eligibility for submission to the collection agency. However, if reported, the patron will be reported for all amounts owed.

You can type the date in the format shown in the control, or click the down arrow to pick a date from the calendar.

- b) Type the number of days in the **Fine age (days)** box to identify the most recent fine that can be considered in the delinquent balance.

Note:

If you send fine notices to patrons to warn them that their accounts will be placed in collection, be sure this setting is *greater* than the fine age setting for the fine notice. This will ensure that the patron receives the notice before the account is sent to collection. See ["Fine Notices"](#) on page 428.

- c) Type a threshold charge amount in the **Min balance** box. If a patron's charges exceed this amount, the patron's account is considered to be delinquent and is submitted for collection. For example, if you want patron accounts to be submitted with charges of \$25 or more, type \$24.99.

Note:

If you send fine notices to patrons to warn them that their accounts will be placed in collection, set this to the *same* value as the minimum balance that triggers the fine notice. See ["Fine Notices"](#) on page 428.

- d) (System level only) To send accounts to collection based only on lost item charges (combined replacement and processing fees), select **Minimum balance based on item fees only**.

For details about this option, see ["Reporting for Lost Item Charges Only"](#) on page 261.

If selected, this setting affects all calculations to determine if a patron account qualifies for reporting, regardless of the **Reporting Level** (System, Library, Branch) or **Reporting By** (Patron Branch, Item Branch, Loaning Branch) settings on the Control tabbed page.

Note:

When you set the "item fees only" option, calculations for new collection agency submissions from that point on will be affected. Patron accounts reported under previous rules are not affected.

- e) To exclude specific categories of patrons, select the categories in the **Patron codes to exclude** list.
- f) To include specific patrons that would otherwise be excluded, click **Add** to find and select patrons to put in the **Patrons to include** list.

Note:

When you manually include patrons for collection, the list is cleared after the patrons have been reported.

10. Click the **Details** tab, and enter the balance ranges and their associated collection fees as follows:

Collection Agency Setup

Control Criteria **Details** Output

Collection agency fees

1. From:	\$10.00	To:	\$49.99	Amt:	\$5.00
2. From:	\$50.00	To:	\$9999.99	Amt:	\$10.00
3. From:		To:		Amt:	

User defined fields to include

- ☐ ID Number
- ☐ Privileges / Restrictions
- ☐ Voter Registration
- ☐ CybraryN Use Only (XXX,YYY)
- ☐ Not Currently In Use

- a) Type the beginning amount of the balance range in the first **From** box.
- b) Type the collection fee for the balance range in the first **Amt** box.

The collection fees are automatically added to the balances on the delinquent patron accounts when the collection agency report is submitted.

- c) Click **Apply**.

A default end amount for the balance range appears in the **To** field.

- d) To set different fees for other balance ranges, repeat steps a-c. Each **To** field changes according to the **From** fields.

Note:

If a patron account has any charge, payment or waive activity after the account is submitted to the collection agency, the patron account is included on the update report, but the collection agency fee is not charged again. The fee is charged only when the account is submitted to the collection agency.

11. To include information on the Submission and Update reports from the user-defined fields in the patron records, select the appropriate check boxes. Then click **Apply**.

Note:

For collection agencies other than UMS, if you want collection agency communications to go to the guardian of a minor patron, select the user-defined field for the guardian's patron barcode. For more information, see ["Reporting Minors"](#) on page 262.

12. Click the **Output** tab.

Settings on this tabbed page control transmission methods for the Submission and Update reports. You can transmit reports by e-mail, FTP, or both.

13. To transmit automatic reports via e-mail to the collection agency and library staff, follow these steps:
 - a) Select (check) **Send email**.
 - b) Specify the e-mail addresses that should receive the report in the **To** box.

Note:

You can specify multiple **To** e-mail addresses. Separate them with a semicolon (;). For example, you can send a copy of the report to the collection agency and to a library staff member. However, the e-mail fields are limited to 255 characters, including the characters that separate multiple addresses. If you have multiple e-mail addresses that require more characters, set up a distribution group on the e-mail server, and type the distribution group name in the e-mail address field.

- c) Specify the reply e-mail address in the **From** box.

Note:

The e-mail summary option is intended to be used with the FTP option (see step 14). If the library sends files to the agency via e-mail but does not use FTP, do not select this option.

14. To transmit reports via FTP, follow these steps:
 - a) Select (check) **Enable FTP**.
 - b) If you want library staff to receive a summary e-mail report, check **Send e-mail** and set up the addresses as described in step 13. Then select (check) **Send summary email only**. If you leave this option unchecked, the full collection agency reports will be sent by e-mail to the specified e-mail addresses, and via FTP to the collection agency. See [“E-Mail Summary”](#) on page 263.
 - c) If the collection agency uses Active FTP (see [“Active FTP”](#) on page 263), select (check) **Set mode to Active FTP**. If you leave this option unchecked, Passive mode is used.

- d) Supply your agency's server information in the following fields:
- **FTP server** - Type the complete URI for the agency's FTP server.
 - **Default Folder** - Type this organization's folder name as it exists on the agency's FTP server. See ["Collection Agency Reporting via FTP"](#) on page 263.
 - **Default port** - Type the port number for the agency's FTP server.
 - **User Name, Password** - Supply your user name and password for the agency's FTP server.
- e) If you use a third-party service for FTP transmission (see ["Secure FTP and Third-Party FTP software"](#) on page 263), follow these steps:
- Type the executable name (for example, **ftp.exe**) or click **Browse** to browse for and select the executable.
 - Enter the FTP parameters as directed by your third-party service. At a minimum, your entry must include **[FTPFILE]**. Other valid parameters include:
 - [FTPServer]** - Server that will be used for FTP
 - [FTPUSER]** - FTP user
 - [FTPPASSWORD]** - FTP password
 - [FTPPORT]** - FTP port
 - [FTPREMOTEPath]** - The remote FTP path to put the file in

Example:

-s -file [FTPFILE]

Note:

Some of the parameters may duplicate the values you entered in the **User Name, Password**, or other fields.

15. In the **Number of days to keep the reports** box, specify how long report copies should be kept on the library's server.

Note:

Collection agency report processing takes place on the server. Report copies are automatically saved in the following default server location:
C:\ProgramData\Polaris\[version]\Logs\SSIS\CollectionAgency\Reports
[Branch Abbreviation]

16. Click **OK** to save your changes and close the dialog box, or click **Apply** to save your changes and continue to work with this dialog box.

Related Information

- **Changing reporting levels** - Libraries, and especially consortia, are advised *not* to change the reporting level (system, library, or branch) on the Collection Agency Setup dialog box after it is established. Changing this setting can cause patron accounts to be lost from the reporting process or unexpectedly added. However, if you must change the reporting level, first select a level that you do *not* want in the **Reporting Level** box, then click **Apply**. Then select the level you want, and click **OK**.

Example:

To change the level from **System** to **Branch**, first change from **System** to **Library** and click **Apply**. Then change from **Library** to **Branch** and click **OK**.

- **Fine notices** - If the library sends warning notices to delinquent patrons before the patrons are reported for collection, set up the fine notices in Polaris Administration. See [“Fine Notices”](#) on page 428.
- **Collection agency reports** - See [“Collection Processing Reports”](#) on page 274.
- **Processing payments from the collection agency** - A collection agency may collect payments directly from patrons, and turn over a bulk payment with a report to the library. In this case, you record the payments a patron made to the collection agency by selecting **Collection Agency** as a payment method in the patron record. See [“Pay charges from the Account view”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Displaying an individual patron’s collection history** - See [“Patrons in Collection”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Manually removing a patron’s account from collection** - You can manually remove a patron’s account from collection in the staff client. See [“Remove a patron account from collection”](#) in the *Polaris Patron Services Guide 4.1R2*. However, the action is not included in any automatic collection agency reports. *If a patron’s account is manually removed from collection, you must inform the collection agency.*

Collection Processing Reports

Three reports are created in Polaris and sent to the collection agency. The Submission Report and the Update Report are scheduled to run in overnight batch processing, while the Collection Agency Synchronization Report is run on demand. These reports are ASCII text files that can be imported into Microsoft Excel or another spreadsheet application to format as needed.

Important:

Collection Agency reports depend on the SQL Server job **Polaris_Collection**. Before running reports, in SQL Enterprise Manager, check that the SQL Server job **Polaris_Collection** is scheduled properly and enabled. The schedule should not interfere with other running jobs.

- **Submission Report** - Includes all patrons who have been flagged for collection since the last Submission Report was generated. See [“Using a Collection Agency”](#) on page 260. These patrons are not included in subsequent Submission reports unless their patron records are cleared, and they qualify at a later time. The report runs in overnight batch processing on a regular schedule and is transmitted to the collection agency automatically. See [“Set up collection agency processing”](#) on page 266.
- **Update Report** - Includes all patrons whose accounts are in collection and have had any activity (new charge, payment, or waive) at the reporting organization since the last report (Submission or Update) was generated. The report runs in overnight batch processing on a regular schedule and is transmitted to the collection agency automatically. See [“Set up collection agency processing”](#) on page 266.

Important:

To be sure the system reports the recovery of lost items correctly, set the Patron Services parameter **Overdues: Billed items set to lost** to **Yes**.

- **Collection Agency Synchronization Report**- Summary of all patrons currently reported to the collection agency. It includes each patron's barcode, name, and the amount due. The Balance Due System is the amount a patron owes to all reporting organizations, and the Balance Due Org is the amount a patron owes to the reporting library. (If the reporting organization is the system, the amounts are the same.) It is possible that the patron may be reported on behalf of more than one library; for example, if the reporting options are set to Item's Branch. In this case the patron would appear twice in the report, once for each reporting organization, and the Balance Due System is the total amount owed to both organizations. Also, the patron may have an actual account balance greater than the Balance Due System. This would happen if the patron owed additional charges to a third library that did not report to the collection agency. That larger amount, the sum of amounts due to the two reporting libraries and the one that did not report, is not included in the Synchronization Report because it does not impact any collection agency processing. The collection agency may use this report to verify that its records are accurate. You can run this report on demand, at any time. When you run the report, it is automatically

transmitted to the collection agency. See [“Generate the Collection Agency Synchronization”](#) on page 275.

In addition to the three reports intended for the collection agency, formatted reports for library use are available from **Utilities, Reports** on the Polaris Shortcut Bar:

- **Collection Agency Summary** - Lists all patrons in collection and the amounts they owe.
- **Collection Agency Detail** - Lists all transactions on accounts submitted to collection within a specified date range.

For more information about running and printing these reports, see [“Patron Financial Reports”](#) in the *Polaris Basics Guide 4.1R2*.

1-2-3

Generate the Collection Agency Synchronization

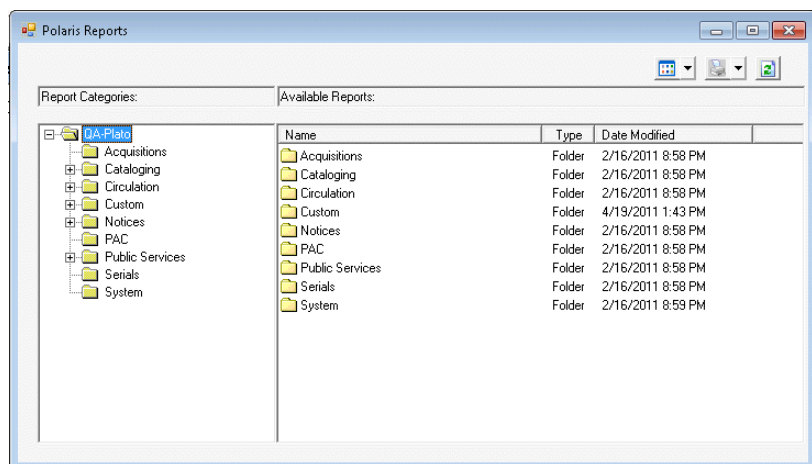
The Collection Agency Synchronization Report identifies patrons currently reported to the collection agency, with their balances. It is recommended that you run it at least quarterly. Follow these steps to run this report.

Important:

Collection Agency reports depend on the SQL Server job **Polaris_Collection**. Before running reports, in SQL Enterprise Manager, check that the SQL Server job **Polaris_Collection** is scheduled properly and enabled. The schedule should not interfere with other running jobs.

1. Select **Utilities, Reports and Notices** on the Polaris Shortcut Bar (staff client).

The Polaris Reports dialog box appears.



2. Expand the **Notices** folder.
3. Select the **Collection Agency** folder under **Notices**.
4. Double-click **Collection Agency Synchronization** in the **Available Reports** list.

The Report Parameter Wizard appears.

5. Select the organization or organizations for which you want to run the report, or select **All**, and click **Submit**.

Note:

The organizations available for selection depend on the setting in the Staff Client parameter **Report Server**. See "[Specify a server for Reporting Services](#)" in the *Polaris Administration Guide 4.1R2*.

The report is created and transmitted to the collection agency according to the Polaris Administration collection agency settings you made for the Submission and Update reports. For information about these settings, see "[Set up collection agency processing](#)" on page 266.

Setting Up Holds and ILL Request Processing



Polaris Administration settings control request processing for materials that are not currently available in the library. Hold requests are routed to specified branches in the system, where they can be filled or denied, or items may be trapped at circulation to fill the requests. Interlibrary loan requests are sent outside the system to obtain materials unavailable from any organization in the system.

Note:

Polaris Borrow by Mail is a licensed feature available at no additional cost that allows staff members and patrons to request library materials and have the requested materials delivered to the patrons by mail. For information about Borrow by Mail request processing, see [“Setting Up Borrow by Mail Circulation”](#) on page 471.

Note:

Libraries that offer integrated 3M ebooks set up request limits and other options with 3M, and many of the features described in this unit do not apply to ebook requests. For details, see [“Requesting 3M Integrated Ebooks from PAC”](#) in the *Polaris Public Access Administration Guide 4.1R2*.

See the following topics:

- [“Holds Processing Overview”](#) on page 278
- [“Setting Up Holds Routing”](#) on page 280
- [“Defining Not-Supplied Reasons”](#) on page 287
- [“Defining Hold Processing Options”](#) on page 289
- [“Blocking Holds at Renewal”](#) on page 311
- [“Restricting Holds on Specific Items”](#) on page 312
- [“Specifying Hold Status Descriptions”](#) on page 315
- [“Setting Up ILL Requests”](#) on page 319

Holds Processing Overview

Staff (and patrons, if you choose) can create hold requests for titles and specific items that are not available at a particular branch, but are owned by other libraries in your system. These requests may be filled during Request-to-Fill processing, or when an item that can fill a request is trapped at circulation.

Request-to-Fill (RTF) Processing

As a request is routed among specified branches with eligible items, a branch may choose to fill the request with an eligible item. Polaris identifies all the items that can fill the request from libraries (responder branches) listed in the Holds Routing Sequences tables for the request's pickup branch (requester branch). These are the only branches that can fill the request. Then during RTF processing, Polaris determines which of these items have a status of In. RTF processing typically runs nightly, but you can schedule it to run more often. When RTF processing is completed, the request appears on the RTF list of the first responder branch that has a holdable item with a status of In.

The responder branch reviews the RTF report after RTF processing is complete. The responder branch can fill, deny, or ignore the request. To fill a request, the library checks in the item and sends it to the pickup library. Then, the item is checked in at the pickup library and held for the patron. If the request is denied or ignored, the request is automatically routed to the next responder branch with an item that is In. This process continues until the request is filled, expires, is denied at each responder branch, or the RTF routing period ends. For more information on the holds workflow in the staff client, refer to [“Working with Hold Requests”](#) in the *Polaris Patron Services Guide 4.1R2*.

Trapping at Circulation

While the hold request is being routed, an item that fills the request may be trapped at circulation. In this case, an alert message is displayed when the item is scanned. If the item is scanned at the pickup library identified in the request, the message notifies staff to hold the item. If an item is scanned at any other library, the message notifies staff to ship the item to the pickup library. An item may be trapped in this way at any time during the life of the hold request.

Note:

You can suppress holds processing for items checked in offline when the offline transaction file is uploaded. See [“Holds Processing at Upload”](#) on page 386.

Polaris Administration Settings for Holds Processing

Polaris Administration settings control the following holds processing characteristics:

- **Holds routing sequence** - Each organization can determine the member libraries in its RTF routing cycle, the routing sequence, and how many days a request remains on a branch's Request-to-Fill list. An organization can set up a primary routing group and a secondary routing group, so that requests are routed out to the secondary group only under certain circumstances. See ["Setting Up Holds Routing"](#) on page 280.
- **Routing duration and options** - Each organization can decide how long the system should continue routing a request from branch to branch (Total RTF). Separate settings control the total RTF cycle for the primary and secondary routing group (if one is defined). You can also randomize the starting point of the primary and secondary routing sequences, and start the secondary cycle immediately under certain circumstances. See ["Set Holds options: RTF processing"](#) on page 303.
- **Hold request not-supplied reasons** - Your library system defines the possible reasons why libraries may not fill hold requests. See ["Defining Not-Supplied Reasons"](#) on page 287. These reasons are available as options when a staff member denies a request. You can set a default reason at the branch level. See ["Set Holds options: RTF processing"](#) on page 303.
- **Policy decisions** - Libraries make policy decisions, such as which circulation statuses should prevent an item from filling a hold request, and whether to allow patrons to request, suspend, and reactivate holds from the PAC. Other settings control trapping preferences, which affect a hold request's position in the queue relative to other requests for the same title or item. See ["Set Holds options: Enabling, Item Status Restrictions, First Available Copy"](#) on page 291 and ["Set Holds options: Trapping preferences, queue settings"](#) on page 306.
- **Holds on specific items** - You can restrict holds on specific items through settings in the item record. For example, you can restrict items of a certain material type to a limited group of preferred pick-up branches. See ["Restricting Holds on Specific Items"](#) on page 312.
- **Hold status descriptions** - You can specify the descriptions that appear wherever hold statuses are displayed in the staff client and PAC. See ["Specifying Hold Status Descriptions"](#) on page 315.
- **Patron hold limits** - You can block requests based on combinations of specific patron codes, limits on total requests, and limits on requests for specific material types. You can also create groups of material types and place limits on the group as a whole. See ["Defining Loan and Request Limit Blocks"](#) on page 332.
- **Hold request notices** - When a hold request is ready for pick-up, a notice informs the patron. Libraries define the mail, e-mail, and phone notification settings. See ["Managing Notification"](#) on page 399.

Setting Up Holds Routing

In Polaris, the specified pickup branch for a hold request (*not* the patron's registered branch) is the "requester" branch for the purposes of RTF routing. Each branch can specify the RTF routing sequence that the system uses when that branch is the pickup branch. When you set up a routing sequence for a requester branch, you are effectively defining the branches with which the requester branch can do the business of hold requests, whether items are taken off the shelf as part of RTF processing or trapped at circulation.

A branch can specify a primary routing sequence alone, or both primary and secondary routing sequences. This allows a library to establish levels of priority in filling hold requests. In a system where libraries are geographically close and have fairly uniform lending policies, a branch may define only a primary group of RTF branches, allowing a request to pass from one branch to the other in a preferred order. Leaving a branch out of a routing cycle will prevent your items from filling requests at that branch. You might do this, for example, if a branch has closed temporarily.

If the concern is not just to fill requests from any branch as efficiently as possible but to first check with a specific group of branches (such as geographically close or politically allied branches) the library might place itself and a few other branches in the primary group, but place other libraries in the secondary group. Then a request is routed to the secondary group only if the primary group does not have the item.

Note:

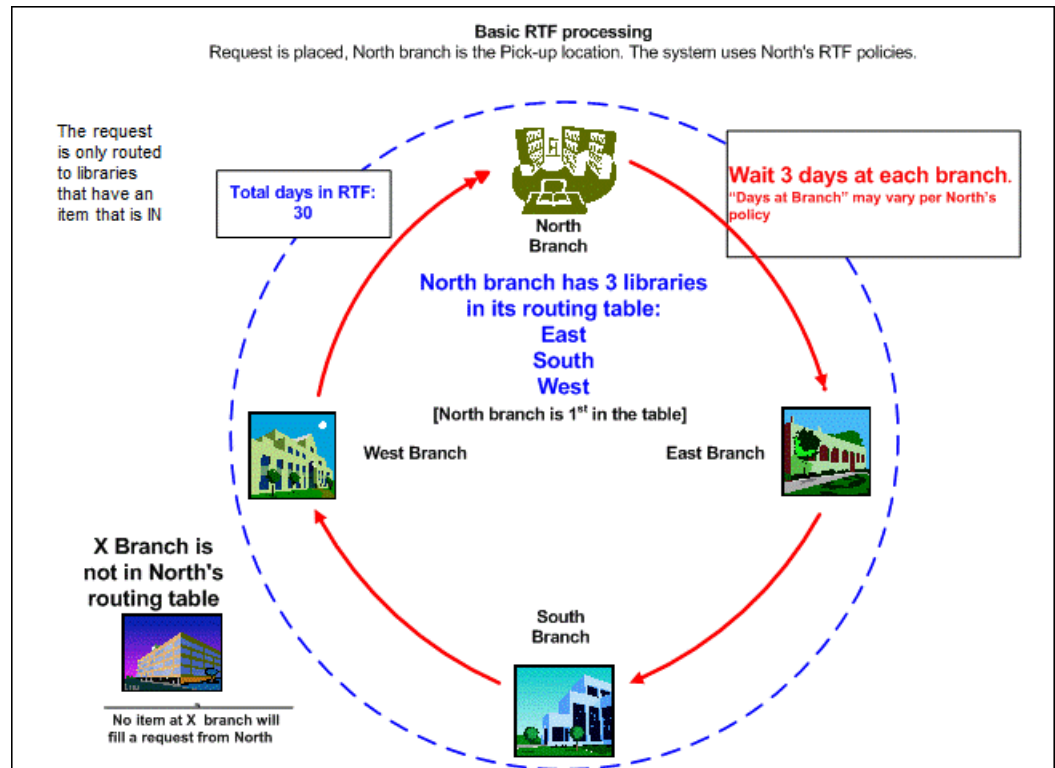
You can set Polaris to randomize the request sequence so that the same library is not always the first asked to fill the request. See ["Set Holds options: Enabling, Item Status Restrictions, First Available Copy"](#) on page 291.

When you use primary and secondary routing groups, and a request is routed to the secondary group, the position of the request in the holds queue may change. If you think this might confuse patrons, you can suppress the display of the holds queue position in PAC and Polaris ExpressCheck. For PAC, set the PAC profile **Patron access: Display hold queue information** to **No**. The profile setting for the *patron's registered branch* controls whether the holds queue column is displayed in the online patron account, and whether the patron receives a message about the current number of active requests for the material when she places a hold. For Polaris ExpressCheck, open the SelfCheck Unit parameter **Polaris ExpressCheck enable** and clear the **Display hold queue position** check box.

Note:

It is neither necessary nor desirable to include the same branches in both the primary and secondary cycles as this defeats the purpose of separately defined groups. Also, when a request passes to the secondary routing cycle, an item that checks in to a primary branch will still trap for the request.

The illustration shows an example of primary group routing.



Holds Routing Sequences

The Holds Routing Sequences Primary and Holds Routing Sequences Secondary policy tables specify the RTF routing sequences of hold requests from the requester branch to other branches, and determine whose items can be trapped at circulation to fill a request. Your Polaris Implementation Manager helps set up the tables when Polaris is installed, but you can modify them as needed. The Holds Routing Sequences Secondary table can be left empty if the branch does not use a secondary RTF sequence.

You can work with these tables from an organization workflow or with the Administration Explorer. When you open the tables at the system level, you can view, add, change, delete, and reorder entries for any branch. At the library level, you can view, add, change, delete, and reorder entries for any branch associated with the library. At the branch level, you can view, add, change, delete, and reorder entries only for the specific branch.

Note:

These System Administration permissions are required to modify these tables: **Access administration: Allow, Access tables: Allow, Modify holds routing sequence table: Allow.**

For each branch (and in each routing group, if you use both groups), the following information is defined:

- **Requester branch** - The branch designated as the pickup branch for the hold request.
- **Responder branch** - A branch that can fill a hold request for the requester branch. If the responder branch owns an item that fills a request *and* the item has a status of In, the branch is part of the RTF sequence for that request. If a branch is *not* listed as a responder branch, the branch cannot fill a hold request from the requester branch, regardless of any items it may have.
- **Sequence** - The order in which a request is routed to responder branches, one branch at a time. For example, if Responder A has a Sequence setting of 3, it is the third library to receive a request from the Requester library (assuming that branches with a sequence of 1 and 2 have items that are In, but deny or ignore the request). You can randomize which library should come next to start the sequence, if number 1 denies or ignores the request. See [“Set Holds options: Enabling, Item Status Restrictions, First Available Copy”](#) on page 291.

Important:

Each branch should put itself in the first position (sequence of 1) for the Primary table's Responder column. That way, the request can be filled first by the requester branch, if that branch has an item that is In. *If the branch is not listed as a responder branch for itself, its own items do not trap for holds at circulation.* If you use secondary groups, you would probably not want your branch as a responder branch in the secondary group, since the branch would be polled again if the request went to the secondary group. If a request does go to the secondary RTF group, an item can still be trapped at any branch in either group.

- **Days at branch** - The number of days a request stays on a branch's RTF list if no one responds to the request. When the period is over, the request moves to the next responder branch in the sequence with an item that is In. Polaris skips days closed and dates closed for the responder branch when calculating this period, so they do not count toward the total days at the branch. Days closed are specified with the Patron Services parameter **Hours of operation**, set at the system, library, or branch level. Dates closed are set in the Dates Closed policy table for an organization. See ["Identifying Dates Closed"](#) in the *Polaris Administration Guide 4.1R2*.

Note:

You set the total number of days in the entire RTF cycle with the Request parameter **Holds options** (RTF tabbed page). See ["Defining Hold Processing Options"](#) on page 289.

1-2-3

Add a holds routing sequence entry

Follow these steps to add a routing entry to a Holds Routing Sequences policy table. If you use primary and secondary routing sequences, you edit the Holds Routing Sequences Primary and Holds Routing Sequences Secondary tables separately; however, the basic procedure is the same for both tables.

Note:

Although it is possible to add the same branch to both the Holds Routing Sequences Primary and Holds Routing Sequences Secondary tables, this might result in the same branch being polled in both RTF cycles. Secondary routing groups handle RTF routing in "only if not in the primary group" situations, so adding the same branch to both tables would defeat this purpose.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Holds Routing Sequences Primary** or **Holds Routing Sequences Secondary**.

Note:

To better manage memory, a program-defined row limit determines whether these tables can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

The Hold Routing Sequences table is displayed in the details view.

Requester Branch	Responder Branch	Sequence	Days at branch
Community Libr...	Community Library...	1	1
Community Libr...	Saratoga Springs P...	2	1
Community Libr...	Test Branch 1 (Libr...	3	1
Community Libr...	Test Branch 1 (Libr...	4	1
Community Libr...	Test Branch 1 (Libr...	5	1
Community Libr...	Joanne Branch (Libr...	6	1
Community Libr...	Karen Branch 1 (Li...	7	1
Community Libr...	Test Branch 1 (Libr...	8	1
Community Libr...	Test Branch 1 (Libr...	9	1
Community Libr...	Test Branch 1 (Libr...	10	1
Community Libr...	Test Branch 1 (Libr...	11	1
Community Libr...	Test Branch 10 (Libr...	12	1
Community Libr...	Test Branch 10 (Libr...	13	1
Community Libr...	Test Branch 10 (Libr...	14	1
Community Libr...	Test Branch 10 (Libr...	15	1
Community Libr...	Test Branch 10 (Libr...	16	1

2. Click  to display the Insert Holds Routing Sequences dialog box.

Insert : Holds Routing Sequences Primary -

Requester Branch: Community Library (Cobleskill)

Responder Branch: Amsterdam Free Library

Sequence: 2

Days at branch:

*Note: Insertions for this table are limited to Branch organizations.

OK Cancel

3. In the **Requester Branch** list, select the branch to which the holds routing entry is being assigned.

Note:

If the Holds Routing Sequences table is opened at the branch level, only the branch name is displayed in the **Requester Branch** list.

4. In the **Responder Branch** list, select the branch to which you want to send hold requests.

Note:

If all the branches in the system are already in the table, the **Responder Branch** box is unavailable, because you cannot add a duplicate entry to the table.

You can add any or all branches as responder branches. If you do not exchange requested materials with one or more branches in the system, do not add these branches to the table. A responder branch may be included in the Holds Routing Sequences table for one library, but not another. For example, Branch A may include Branches C and D as responder branches, but not Branch B. However, Branch B may include Branches A, C, and D.

Important:

When defining the routing cycles for your branch (you are the requester) your branch will normally be the first branch in the sequence. This insures that requests always come to you first. Omitting a branch from the sequence means that this branch will never fill hold requests, a branch that is a processing center is an example of this. However, if you use both a primary and a secondary routing group, add your branch to only one cycle. It is not necessary to include a branch in both cycles.

5. In the **Days at branch** box, type the number of days a request should stay on the RTF list for the responder branch when the branch does not fill or deny the request.

6. Click **OK** on the dialog box.

The Holds Routing Sequences table appears with the new requester branch/responder branch entry. The status bar indicates that the modification is pending.

7. To position the responder branch in the holds routing sequence, select the responder branch, and click the arrow buttons:

- Click  to move the branch earlier in the sequence.
- Click  to move the branch later in the sequence.

Important:

Each requester branch should put itself as a responder branch in the first position (Sequence of 1).

The value in the **Sequence** column changes as you reposition the entry.

8. Select **File, Save** to save your changes.

The status bar indicates that the record is saved.

9. Set the Request parameter **Holds options**, if you have not already done so.

Several **Holds options** settings affect the RTF cycle. For more information, see [“Defining Hold Processing Options”](#) on page 289.

Related Information

- **Modify a table entry** - Select the entry and click . You can change the **Days at branch** setting for an existing holds routing entry. If you need to change the holds routing entry to another responder branch, delete the incorrect entry and insert a new holds routing entry.
- **Delete a table entry** - Select the entry and click .
- **Reorder the holds routing sequence** - To change the order in which a hold request is routed, change the position of the responder branch in the routing sequence. Select the responder branch entry, and click  to move it earlier in the sequence, or click  to move it later in the sequence.

- **Request history** - You can see a request's status as it passes from branch to branch in the request-to-fill cycle. On the Hold Request workflow in the staff client, select **View, Notes**. Request history information is located at the bottom of the Notes view. Each time the request passes to a different branch, the status is displayed as Pending. For more information about working with requests in the staff client, see "[Placing Hold Requests](#)" in the *Polaris Patron Services Guide 4.1R2*.

Defining Not-Supplied Reasons

When a staff member denies a hold request, the staff member selects a reason why the request is not being filled. You define the possible reasons in the User Defined Hold Not-Supplied Reasons policy table. The same entries are displayed for every organization level at which the table is opened. You can add entries to the table at the system, library, and branch levels, but the addition is applied to all organizations. In other words, all organizations should agree on the not-supplied reasons they use for their hold requests. You cannot delete entries from this table.

You can open the User Defined Hold Not-Supplied Reasons table from the Administration Explorer only. You cannot access this table from an organization workflow.

Note:

These System Administration permissions are required to modify this table:
Access administration: Allow, Access tables: Allow.

1-2-3

Add a not-supplied reasons entry

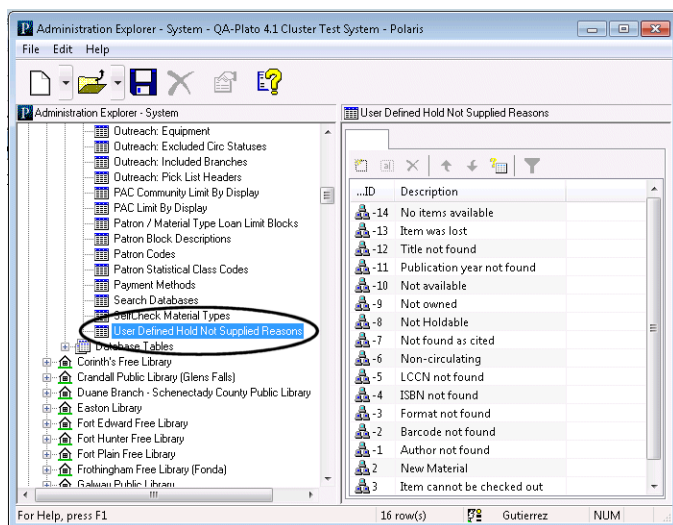
Follow these steps to add a not-supplied reason to the User Defined Hold Not-Supplied Reasons policy table.

Important:

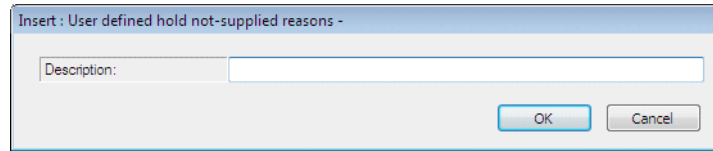
New not-supplied reasons are available to all organizations.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **User Defined Hold Not-Supplied Reasons**.

The table is displayed in the details view.



2. Click  to display the Insert User defined hold not-supplied reasons dialog box.



3. Type the text describing the not-supplied reason in the **Description** box.
4. Click **OK** in the dialog box.

The User Defined Hold Not-Supplied Reasons policy table is displayed with the new entry. The status bar indicates that the modification is pending.

5. Select **File, Save** to save your changes.

Related Information

- **Default not-supplied reason** - You can set a default not-supplied reason, choosing from the reasons defined in the User Defined Hold Not-Supplied Reasons policy table. See [“Set Holds options: RTF processing”](#) on page 303.
- **Non-holdable item checked out to requesting patron** - When a non-holdable item is checked out to a patron who has a title-level hold request that the item would otherwise fill, the hold request (Active or Inactive) is deleted. “Non-holdable items” include any item that is prevented from binding to the request. For example, such items include those where the **Holdable** option is not checked in the item record, or other item settings related to holds prevent the item from being trapped; the item is restricted by status, such as Lost; the item’s assigned branch is not in the routing table.

Defining Hold Processing Options

You can choose from a number of options to determine whether patrons can place and suspend hold requests from the PAC, set how Polaris processes hold requests, and set certain aspects of RTF routing. These settings are available through the Request parameter **Holds options**. Most **Holds options** settings can be made at the system, library, or branch levels. However, options that control charges for holds, options that control the time when expired, cancelled, and not-supplied hold requests are deleted from Polaris, and trapping preference groups can be set only at the system level. See the following procedures for detailed instructions on setting each group of holds options; the system-level settings are noted where applicable.

Important:

You must also set up the Holds Routing Sequences policy tables (see [“Setting Up Holds Routing”](#) on page 280).

Title-Level, Item-Level, and First Available Copy Requests

Polaris offers flexible choices regarding hold requests from PAC. You can allow title-level (bibliographic-level) hold requests but not requests for specific items. Or you can prevent item-level hold requests on monographic titles but allow first-available-copy requests. For example, you can allow PAC hold requests for specific issues of a serial title (such as the May 2009 issue of *Horticulture Magazine*) or specific parts of a multi-part title (such as the first season of a television series on DVD), while preventing item-level hold requests on monographic titles. It may be helpful to think of these “first available copy” requests as filtered bib-level requests. If you allow first-available-copy requests but not item-specific requests for monographic titles, specific criteria determine the items that can be held.

Note:

You can completely suppress request and availability information options from PAC search results for specific types of material. See [“Suppressing Request and Availability Options”](#) in the *Polaris Public Access Administration Guide 4.1R2*.

First Available Copy Requests on Serials

If the item record is linked to a Serial Issue Record, is holdable, and has data in the **Issue** field, the request is treated as a first available copy request. The MARC Bibliographic level entry may or may not be **S**. If there are other items with matching **Issue** data linked to the same bibliographic record, these will also be eligible to fill the request. When considering whether **Issue** data matches, internal spaces and all punctuation are considered, but letter case and beginning and trailing spaces are ignored.

If the item is linked to a bibliographic record with the Bibliographic level entry **S**, *but there are no linked Serial Issue Records*, the request can be filled by that specific item only – the equivalent of an item-level request on a monographic title. In other words, if you do not use the Polaris Serials subsystem, but manually enter volume data in the call number of the item, the first-available-copy functionality is not available.

Note:

Libraries who do not use the Serials subsystem can allow individual item requests, setting up each specific issue with an item record. Or, they may use the grouped request functionality in the staff client (see ["Grouping a Patron's Hold Requests"](#) in the *Polaris Patron Services Guide 4.1R2*).

First Available Copy Requests and Multi-Part Titles

If the item record is linked to a bibliographic record with a Bibliographic level entry other than **S**, and has data in the **Vol** field of the call number, the request is treated as a first available copy request. If there are other items with matching **Vol** data linked to the same bibliographic record, these will also be eligible to fill the request. (If the Bibliographic level entry is any value other than **S** and no linked items have data in the **Vol** field, the option to place a request at the item level is not available. In this case, only bib-level requests are allowed.)

Since manually-input **Vol** data may be inconsistent in your database, you may want to use item bulk change to help ensure uniformity of your existing data before implementing the first available copy option for multi-part sets. The multi-part option is separate so that libraries who may have inconsistent item data can implement serial requests and multi-part requests separately while suppressing item requests on plain monographs. If you plan to make the **Vol** data consistent before implementing this feature, keep in mind that request processing uses exact, character-for-character matches as follows:

- Internal spaces and all punctuation affect a match:
 - Vol 1** and **Vol1** do not match.
 - Vol.1** and **Vol1** do not match.
- Case does not matter.
 - Vol.1** and **vol.1** match.

- Beginning and trailing spaces are ignored.

[space] v.1 and [no space] v.1 match

v.1 [space] and v.1 [no space] match

Note:

A request on an item with blank Vol data is placed as a single, item-level request.

Holds for On-Order Multi-Volume Sets

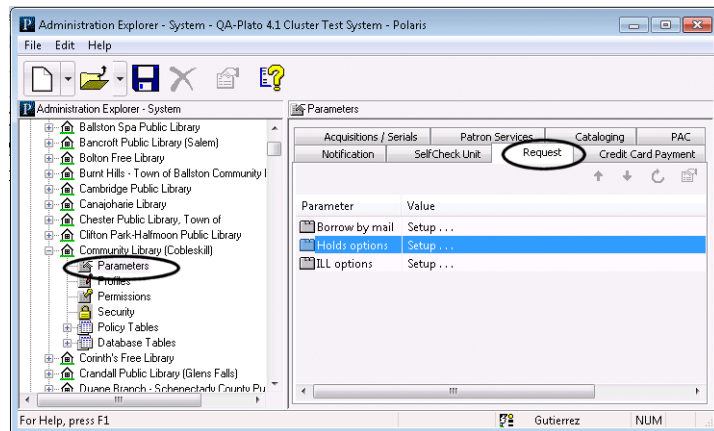
Libraries that use enriched EDI ordering through Polaris Acquisitions and receive shelf-ready items from their vendors can automatically provide patrons with the first volume of a multi-volume set when the set arrives. When the patron places a hold on a new multi-volume set, such as on a television series just released on DVD, the hold is placed at the bibliographic level for the series title. Then, when the full bibliographic record is imported, the embedded holdings create the shelf-ready item records for all the volumes in the series, and the hold is automatically placed on the first volume. For more information, see [“Holds Requests for On-Order Multi-Volume Sets”](#) in the *Polaris Acquisitions Guide 4.1R2*.

1-2-3

Set Holds options: Enabling, Item Status Restrictions, First Available Copy

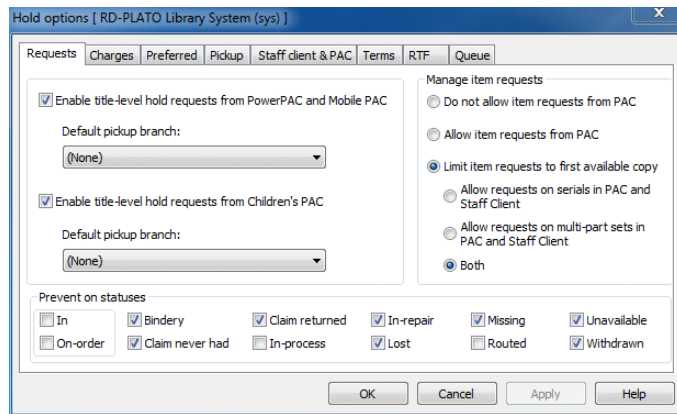
Follow these steps to define hold request processing options for PAC, item-level, and first available copy requests, and to set restricted item statuses.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Request** tab in the details view.



2. Double-click **Holds options**.

The Hold Options dialog box - Requests tabbed page appears.



3. If applicable, set Polaris PowerPAC and Mobile PAC *title-level* hold request options:

- **Enable title level hold requests from PowerPAC and Mobile PAC** - Select (check) this box to allow hold requests from Polaris PowerPAC and Mobile PAC. If this option is not checked, patrons cannot place title-level requests in either application.
- **Default pickup branch** - Select the default location for patrons to pick up their held items. This option sets the default only. A patron can select a different location when placing a request from among those you have designated as pickup libraries. See [“Set Holds options: Pickup library options”](#) on page 297. When the default setting is **None** and the patron selects a pickup branch the first time, or changes the current setting, a message offers to use the selected location until it is changed again. The patron can choose to use the new setting or keep the old one. (The patron can change the setting at any time.) The system uses the setting for the patron’s registered branch.

Note:

You can completely suppress request and availability information options from PowerPAC and Mobile PAC search results for specific types of material. See [“Suppressing Request and Availability Options”](#) in the *Polaris Public Access Administration Guide 4.1R2*.

4. If applicable, set Polaris PowerPAC Children’s Edition *title-level* hold request options:

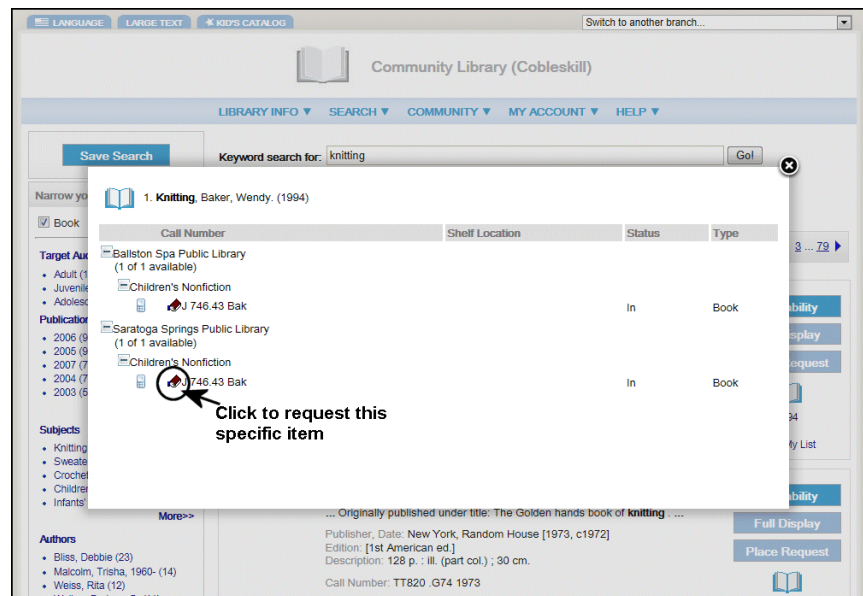
- **Enable title level hold requests from Children’s PAC** - Select (check) this box to allow hold requests from Polaris PowerPAC. If this option is not checked, patrons cannot place title-level requests in Polaris PowerPAC Children’s Edition.
- **Default pickup branch** - Select the location for patrons to pick up their held items. In Polaris PowerPAC Children’s Edition, patrons cannot select a different location when placing a request. Be sure the location you select is allowed as a pickup library for this organization, and do not set the default to **None**. See [“Set Holds options: Pickup library options”](#) on page 297. The system uses the setting for the patron’s registered branch.

5. Select an option under **Manage item requests** to set your policies for item-level requests on monographic materials, specific issues of serial titles, and specific parts of multi-part titles:

Note:

For more information about these options, see ["Title-Level, Item-Level, and First Available Copy Requests"](#) on page 289.

- **Do not allow item requests from PAC** - When this option is selected, the item-level request icon never appears in PAC search results. Patrons cannot place any monographic item-level, serial issue, or part-level requests.
- **Allow item requests from PAC (default)** - When this option is selected, the item-level request icon appears in the availability view of PAC search results for all item records that have not been restricted from filling holds, and patrons can place requests on specific items. The illustration shows a sample PAC display.



- **Limit item requests to first available copy** - Select this option when you want to allow requests on specific issues of serial titles, specific parts of multi-part sets, or both, but you do not want to allow any other item-level requests. When this option is selected, the item-level request icon appears in PAC search results for specific copies of serial titles, specific parts of multi-part sets, or both, but not for monographic items. Your selection for this option also affects hold requests placed in the staff client. When you select this option, both of the following options are automatically selected, but you can opt to select one and not the other:

–**Allow requests on serials in PAC and Staff Client** - Select this option to allow item-specific requests on an issue of a serial or standing order part (such as an issue of *Wired* or a volume of *Fodors*) and prevent title-level requests on these same titles (preventing patrons from accidentally requesting any issue of *Time*). When the

patron clicks **Place Request** at the title level, a message directs the patron to select individual issues. In the staff client, this option does not prevent a staff member from placing an item-specific request for a monographic title, and the staff member can place a first-available-copy request for an issue or standing order part.

–Allow requests on multi-part sets in PAC and Staff Client - Select this option to allow patrons to request the first available copy of a multi-part set, such as Season One of a television series or any one of several copies of Volume One in a set. When this option is selected, for monographic titles like *Harry Potter and the Deathly Hallows*, the request option will only be available at the title level. But the request icon will be available at the item level if you have multiple copies of each season of *The Sopranos* linked to one bibliographic record. Selecting the item-level request icon for Season One will automatically link the request to all copies of Season One. In the staff client, this option does not prevent a staff member from placing an item-specific request for a monographic title, and the staff member can place a first-available-copy request for Season One of *The Sopranos*.

Note:

Regardless of how your item request options are set, if you have enabled title-level requests in the PAC, the title-level **Request** option is displayed. When a patron selects this option, the system will direct the patron to place a request at the item level if appropriate (as for *Time Magazine*). If your settings prevent item-specific or first-available-copy requests, the option to request will *only* be available at the title level.

6. To prevent items with specific statuses from filling hold requests, select the appropriate check boxes for the statuses.

If an item that could otherwise fill a hold request has a circulation status that you have designated as ineligible (such as Missing), the item is ineligible to fill requests when hold requests are placed and requests are routed. However, the item can be trapped for a hold at check in.

Tip:

You can also restrict *specific items* from filling hold requests according to various conditions. See [“Restricting Holds on Specific Items”](#) on page 312.

If you specify that items with the status of In should not fill hold requests, the staff client user receives a warning message if any item is In *at the pickup branch*. (Items with a status of In at other branches do not block the request.) The staff user can override the warning and continue to place the hold request, but requests from PAC are blocked.

Items with a status of Provisional or Deleted are automatically filtered from holds processing.

7. Click **Apply** to save your settings and continue to work with holds options settings, or click **OK** to save your settings and close the Holds options dialog box.

Related Information

Preparing data for serial and multi-part holds - See “Serial and Multi-Part Holds FAQ,” available on the Polaris Customer Extranet.

1-2-3

Set Holds options: Charge for hold requests

You can choose to charge patrons for hold requests if they are filled. This setting is available at the system level only, and your settings apply to all organizations in the system. Follow these steps to set up charges for hold requests.

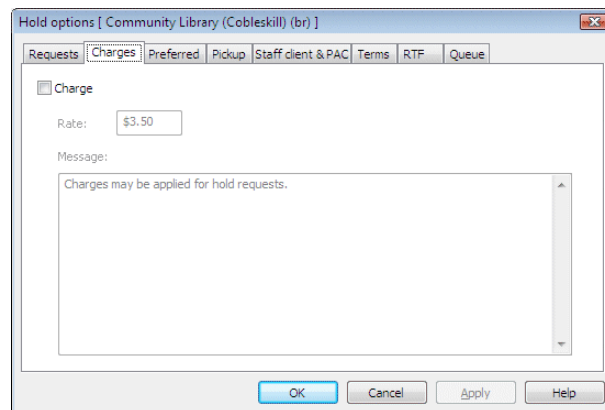
Important:

If you choose to charge fees for hold requests, and you want the charge to apply to hold requests from Polaris PowerPAC Children's Edition, set the Children's PAC profile **Allow hold requests if charging for holds** to **Yes**. The profile is available at the system, library, and branch levels; the default setting is **No**. If you choose to charge a fee for hold requests and you leave the Children's PAC profile set to **No**, hold requests cannot be placed in Polaris PowerPAC Children's Edition.

1. In the Administration Explorer tree view, open the **Parameters** folder for the system, and click the **Request** tab in the details view.
2. Double-click **Holds options**.

The Hold Options dialog box - Requests tabbed page appears.

3. Click the **Charges** tab.



Hold options [Community Library (Cobleskill) (br)]

Requests Charges Preferred Pickup Staff client & PAC Terms RTF Queue

☒ Charge

Rate: \$3.50

Message:

Charges may be applied for hold requests.

OK Cancel Apply Help

4. Select the **Charge** check box.
5. Type the fee per request in the **Rate** box. This amount is automatically added to the patron's account when the hold request is filled.
6. In the **Message** box, type the text that patrons see when they attempt to place a hold request in Polaris PowerPAC.
This message should state that a fee will be charged to the patron account when the hold request is filled.
7. Click **Apply** to save your settings and continue to work with holds options settings, or click **OK** to save your settings and close the Holds options dialog box.

1-2-3

Set Holds options: Preferred borrowers branches

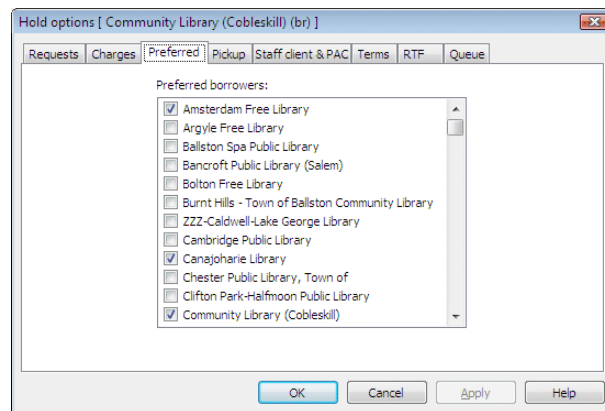
Settings in this list work with the hold limit option **Preferred borrowers** in the item record. When **Preferred borrowers** is checked in an item record, the item is eligible to fill holds only when the item's assigned branch has selected (checked) the pickup branch in this list. See [“Restricting Holds on Specific Items”](#) on page 312. Follow these steps to set the pickup branches for preferred borrowers.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Request** tab in the details view.

2. Double-click **Holds options**.

The Hold Options dialog box - Requests tabbed page appears.

3. Click the **Preferred** tab.



4. De-select (uncheck) any branches that should not be listed as items' "preferred borrowers" branches.
5. Click **Apply** to save your settings and continue to work with holds options settings, or click **OK** to save your settings and close the Holds options dialog box.

1-2-3

Set Holds options: Pickup library options

Follow these steps to set which branches should not be available as pickup library options in the PAC and staff client.

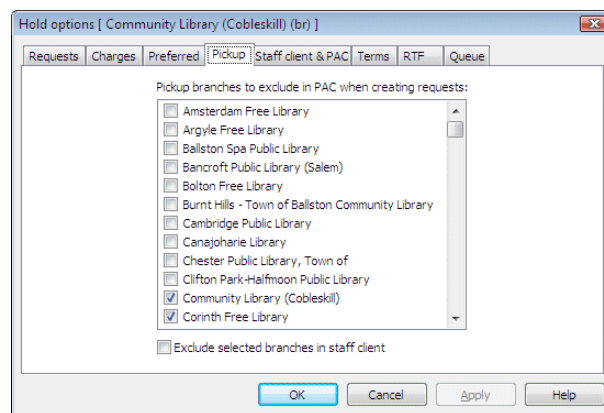
Note:

For hold requests from the PAC, the settings for the *patron's registered branch* determine the available pickup branches.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Request** tab in the details view.
2. Double-click **Holds options**.

The Hold Options dialog box - Requests tabbed page appears.

3. Click the **Pickup** tab.



Tip:

Typically, if a branch is not included in your Holds Routing Sequence policy table, you should exclude it from the pickup branches.

4. Select the check boxes to indicate which branches should *not* be available as pickup library options in PAC.
5. To exclude the same pickup branches from the staff client, select (check) **Exclude selected branches in staff client**.

Note:

To specify a particular library as a pickup branch for a hold request in the staff client, the staff member needs permission to create hold requests at that branch. However, the available pickup branch options depend on the **Exclude selected branches in staff client** settings for the *logged-in branch*. If there is no permission to create holds for the branch, and the branch is excluded, the list of available pickup libraries in the staff client is blank.

6. Click **Apply** to save your settings and continue to work with holds options settings, or click **OK** to save your settings and close the Holds options dialog box.

Related Information

Pick-up branch display order (PAC) - When placing a request from PAC, the patron chooses a pickup library from a list of those you allow. The branch display order is controlled in PAC Administration. See [“Setting Up Polaris PowerPAC”](#) in the *Polaris Public Access Administration Guide 4.1R2*.

1-2-3

Set Holds options: Alerts and blocks

This group of **Hold options** settings controls staff client and PAC alerts and blocks. You can also set an automatic due date adjustment based on the number of hold requests for items, so that popular items can circulate more quickly. Follow these steps to set alerts, blocks, and adjusted due dates.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Request** tab in the details view.
2. Double-click **Holds options**.

The Hold Options dialog box - Requests tabbed page appears.

3. Click the **Staff client & PAC** tab.

4. To allow staff members to fill a hold request at check-out, select (check) **Trap at check-out**.

When this option is checked, an alert message appears when a staff member attempts to check out an item that can fill a request. This setting also blocks check-out of these items at SIP self-check units.

5. To include a patron's telephone number in a trapping message, select (check) **Display patron phone number when trapped**.

When this option is checked, the patron's phone number, along with the patron's name and barcode, appears on the alert message that an item can fill a hold request.

6. Set the bulk check-in alerts:
 - **Alert in bulk check-in if the item will fill holds** - Alert staff during bulk check-in if an item can fill a hold request. Staff have the option of filling the request or not. If you leave this option unchecked, Polaris traps the item automatically.
 - **Alert in bulk check-in if the item is held** - Alert staff that an item is held. Staff can choose whether to continue to hold the item. If this option is unchecked, no message alerts staff that the item is held.

Note:

This setting also affects ILL items. At bulk check-in, the ILL item status goes from Held to In, and if you check this option, the alert message appears for the ILL item.

7. To provide a note field on the PAC patron request form, allowing the patron to enter a note with the request, select (check) **Permit patron notes from PAC**.
8. (*System level only.*) To allow patrons to suspend and reactivate hold requests from Polaris PowerPAC, Mobile PAC, and Polaris ExpressCheck, select **Permit suspended requests from PAC**.

Requests with the status **Active** or **Pending** can be suspended. Requests with the status **Inactive** can be reactivated.

Important:

If this option is disabled, patrons cannot set an activation date in the future when placing a request, but the Suspend/Reactivate options are still displayed on the request page of the PAC patron account.

9. Set the following options (**If no items are attached**) for bibliographic-level hold requests when no items are attached to the bibliographic record:
 - **Alert in Staff Client** - When this option is checked, staff members receive an alert message if they place bib-level hold requests when no items are attached. From the alert message, the staff member can place or cancel the hold request. If this option is not checked, no message appears and the hold request is automatically placed. You may want to leave this option unchecked to prevent repeated messages to staff if your acquisitions staff regularly place bib-level hold requests when no items are attached – for example, from the Purchase Order or Purchase Line Item workforms. The setting for the staff member's log-on branch controls whether the alert message is displayed.
 - **Block in PAC** - When this option is checked, patrons are blocked from placing bib-level hold requests when no items are attached. The request cannot be placed from PAC, and a message advises patrons to contact the library for assistance. If this option is not checked, a message informs the patron that no items are linked to the request. The patron can continue or cancel the request. The settings for the requesting patron's registered branch determine how the system treats bibliographic-level hold requests when no items are attached.
10. Set the following options (**If patron is blocked**) for hold requests from patrons whose records are blocked:
 - **Block in Staff Client** - Select to block a hold request initiated in the staff client if the patron's record is blocked for any reason. Staff members can override the block. If you leave this box unchecked, staff can place a hold for the patron regardless of any blocks on the patron's record or hold limits (see [“Defining Loan and Request Limit Blocks”](#) on page 332), and no block messages appear. The system uses the setting of the pick-up branch.

- **Block in PAC** - Select to block a hold request initiated in Polaris PowerPAC, Mobile PAC, or Polaris PowerPAC Children's Edition if the request would exceed the setting for the total number of requests allowed or the number of requests allowed for a particular material type. See ["Defining Loan and Request Limit Blocks"](#) on page 332.

11. To enable a request status of Out and display requests with this status in the staff client and PAC patron account, select (check) **Enable request status "Out"**. The setting for the workstation's logon branch controls the display in the staff client; the setting for the patron's registered branch controls the display in the PAC patron account.

A request status changes to Out when a held item is checked out, allowing the request to remain available for tracking purposes until the item status changes from Out to In, Held, Transferred, In-Transit, or Lost.

Note:

The Out request status is automatically enabled if your library offers Borrow by Mail. See ["Setting Up Borrow by Mail Circulation"](#) on page 471.

12. Select (check) **PAC display patron contact info** to display the patron's contact information on the PowerPAC request confirmation page so that patrons can verify the information. A link is provided so the patron can update the information if necessary.

This feature is particularly convenient for patrons who place Borrow by Mail requests and need to check their mailing addresses.

Note:

This feature does not apply to Mobile PAC.

13. Select (check) **PAC block for patron verification** to block hold requests from PAC if there is a verification block on the patron record.

This type of block is added when the patron has registered online or has requested updates to certain patron account information. See ["Setting Patron Access Options"](#) in the *Polaris Public Access Administration Guide 4.1R2*.

14. To set an item's due date to change automatically according to the number of hold requests for the item (request-to-item ratio), do these steps:

- a) **Select Change due date based on ratio.**

Loan periods are shortened to a library-specified period. For example, if there were five requests for one item, the loan period for the item could be shortened to allow the item to circulate more quickly. This setting affects only loan periods of more than 7 days, and applies only to bibliographic-level holds. The calculation is based on all holdable items attached to a bibliographic record, regardless of Assigned Branch, and all open hold requests, but shortens the loan period of

items according to the value set for this parameter by the item's assigned branch. (Non-holdable items are not included in the calculation.)

Note:

To display a message to circulation staff when a due date is automatically changed according to the request-to-item ratio, set the Patron Services parameter **Due date truncated: Prompt** to **Yes**.

- b)** In the **Requests** box, type the number of requests in the requests-to-item ratio that triggers the change in due date.
 - c)** In the **Items** box, type the number of items in the requests-to-item ratio that triggers the change in due date.
 - d)** In the **Loan period** box, type the number of days for the loan period when the requests-per-item ratio is met.
- 15.** Click **Apply** to save your settings and continue to work with holds options, or click **OK** to save your settings and close the Holds options dialog box.

1-2-3

Set Holds options: Expiration and Unclaim limits, Deletion options

This group of settings controls how long a requested item's status remains held for pickup, how long a hold request remains in the queue without being filled, when the system deletes hold request records, how to handle unclaimed requests, and whether to include Held and Shipped requests in limit calculations. Follow these steps to set terms and limit calculations.

- 1.** In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Request** tab in the details view.
- 2.** Double-click **Holds options**.

The Hold Options dialog box - Requests tabbed page appears.

- 3.** Click the **Terms** tab.

Hold options [Qa-Cluster - System (sys)]

Requests Charges Preferred Pickup Staff client & PAC Terms RTF Queue

Days

Number days held for pickup: 5

Default expiration period: 10

*** Delete expired in: 2

*** Delete cancelled in: 2

*** Delete not-supplied in: 2

Unclaimed requests:

☒ Delete

☐ Cancel

*** ☐ Total holds thresholds include Held/Shipped

*** System level only

OK Cancel Apply Help

4. In the **Number days held for pickup** box, type the number of days an item is held for a patron.

The hold request status becomes unclaimed at 11:59 pm on the last day the item is held. The system takes into account the dates closed and hours of operation (days closed) when calculating the last day the item is held. The pick-up branch's setting is used.
5. In the **Default expiration period** box, type the number of days that a hold request remains in the queue before the request status automatically changes to expired.

When a request has expired, it can no longer be filled. The pick-up branch's setting is used.
6. (*System level only*) Specify when the system deletes expired, cancelled, and not-supplied hold request records:
 - **Delete expired in** - The number of days after which an expired hold request is automatically deleted from Polaris. To delete requests immediately upon their expiration, set this to **0** days.
 - **Delete cancelled in** - The number of days after which a cancelled hold request is automatically deleted from Polaris. To delete requests immediately upon their cancellation, set this to **0** days.
 - **Delete not-supplied in** - The number of days after which a hold request with a not-supplied status is automatically deleted from Polaris. To delete requests immediately when they become not supplied, set this to **0** days.
7. For **Unclaimed requests**, select one of the following options for handling unclaimed requests:
 - **Delete** - An unclaimed request is automatically deleted when the item is checked in or out. Deleted requests are automatically removed from the system. This setting also applies to SIP self-check units.
 - **Cancel** - An unclaimed request is automatically cancelled when the item is checked in. A cancelled request remains in the system, so it can later be reactivated or deleted.
8. (*System level only*) To include requests with a status of Held and Shipped when calculating the total number of hold requests a patron can have and the request limit by material types, select (check) **Total holds thresholds include held/shipped**.

If you leave this option unchecked, calculations include requests with a status of Active, Inactive, and Pending only. For information about setting total request limits and request limits by material type, see ["Defining Loan and Request Limit Blocks"](#) on page 332.
9. Click **Apply** to save your settings and continue to work with holds options, or click **OK** to save your settings and close the Holds options dialog box.

Related Information

Hold request status definitions - See [“Specifying Hold Status Descriptions”](#) on page 315.

1-2-3

Set Holds options: RTF processing

Follow these steps to set options related to requests-to-fill processing.

Note:

For more information on holds routing and setting up primary and secondary RTF routes, see [“Setting Up Holds Routing”](#) on page 280.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Request** tab in the details view.
2. Double-click **Holds options**.
The Hold Options dialog box - Requests tabbed page appears.
3. Click the **RTF** tab.

Hold options [Community Library (Cobleskill) (br)]

Requests Charges Preferred Pickup Staff client & PAC Terms **RTF** Queue

☐ Allow only one cycle in Primary RTF
Total days in Primary RTF Cycle: 365

☐ Allow only one cycle in Secondary RTF
Total days in Secondary RTF Cycle: 365

☒ Randomize Primary RTF

☒ Randomize Secondary RTF

☐ When no items in Primary RTF, transfer immediately

Default not-supplied reason (System level only):
▼

☐ If all material limits exceeded, set to Not Supplied

OK Cancel Apply Help

4. Select (check) **Allow only one cycle in Primary RTF** to send requests through the RTF cycle only once when all libraries in the requester branch's primary routing table deny or ignore the request.
When this option is checked and you use only one routing sequence, at the end, the request status becomes Active and the item can be trapped at circulation, but the request no longer appears on the responder libraries' RTF lists. If you use a primary and secondary routing sequence, the request goes to the secondary routing sequence at the end of the cycle.
5. (For libraries that use secondary routing sequences.) Select (check) **Allow only one cycle in Secondary RTF** sequence to send requests through the secondary RTF cycle only once when all libraries in the requester branch's secondary routing table deny or ignore the request.

When this option is checked, at the end of the secondary routing cycle, the request status becomes Active, and the item can be trapped at circulation at any branch, but the request no longer appears on the libraries' RTF lists.

Note that when a request is routed to the secondary cycle, items will still trap if checked in at a primary cycle branch.

6. Select (check) **Randomize Primary RTF** to have the system randomly select which library in the primary RTF sequence is the next library to get the request when the first branch in the sequence denies or ignores the request. After Polaris selects the next library, the sequence is followed in order.

You might select this option to prevent the same library from repeatedly filling the requester branch's requests.

7. (For libraries that use secondary routing sequences.) Select (check) **Randomize Secondary RTF** to have the system randomly select which library in the secondary RTF sequence is the next library to get the request when the first branch in the specified start sequence denies or ignores the request. This option works like **Randomize Primary RTF** (above), but it applies to the secondary routing sequence.
8. (For libraries that use secondary routing sequences.) Select (check) **When no items in Primary RTF transfer immediately** to send a request immediately to the secondary routing sequence when no items are In at any of the responder branches in the primary routing sequence. If this option is not selected (do not transfer immediately), if all items are out, are holdable, or otherwise not restricted from filling requests, the request remains in the primary cycle for the period of time you set in **Total Days in Primary RTF cycle**. However, if all remaining items are somehow restricted from filling requests—for example they are not holdable or they have a request such as Lost and items with that status have been restricted from filling requests—the request will move to the secondary because there are no items that can fill the request in the primary.
9. In the **Total Days in Primary RTF cycle** box, type the number of days a hold request continues to follow the sequence of responder branches designated in the Holds Routing Sequences Primary policy table (see [“Setting Up Holds Routing”](#) on page 280).

If you use a single routing sequence, when this time period is over, the request can still be filled when an item is trapped at circulation, but it is no longer routed to the branches. If you use both primary and secondary routing sequences, and you have not selected **transfer immediately** (see step 8), the request remains Active in the primary cycle for this number of days before going to the secondary routing sequence.

10. (For libraries that use secondary routing sequences.) In the **Total Days in Secondary RTF cycle** box, type the number of days a hold request continues to follow the sequence of responder branches, as designated in the Holds Routing Sequences Secondary policy table (see [“Setting Up Holds Routing”](#) on page 280).

When this time period is over, the request can still be filled when an item is trapped at circulation, but it is no longer routed to the branches.

11. (*System level only.*) In the **Default not-supplied reason** box, select the default reason that is displayed when a library denies a hold request.

Your choices for this setting are defined in the User Defined Hold Not Supplied Reasons policy table. See [“Defining Not-Supplied Reasons”](#) on page 287.

12. Select **If all material limits are exceeded set to Not Supplied** to display a block message in the staff client when all the items attached to the bibliographic record have the same material type and a patron has reached the hold limit by material type. The system uses the setting of the governing library for patron blocks.

If the block is overridden, the request is placed with a status of Not Supplied. The Not Supplied reason is **All items denied by system**. If some items have the limited material type and some do not, a message is displayed and those of the limited material type are automatically denied by the system.

If this option is *not* checked, and all the items attached to the bibliographic record have the same material type, the block message is displayed in the staff client as above. However, if the block is overridden, the request is placed with a status of Active. If some items have the limited material type and some do not, a message is displayed and those of the limited material type are automatically denied by the system.

13. Click **Apply** to save your settings and continue to work with holds options, or click **OK** to save your settings and close the Holds options dialog box.

1-2-3

Set Holds options: Trapping preferences, queue settings

The holds queue is the prioritized list of Active or Pending requests for a specific title or item. By default, hold requests are arranged from the request with the earliest Active date at the top to the request with the most recent Active date at the bottom. Trapping preference settings, which are optional, can override the queue and affect which request an item will fill when it is scanned at check in, nearly the last step in holds processing. They do not affect Pending requests in requests-to-fill (RTF) routing, which determines which requests to place on a pull list. Also, trapping preferences do not affect restrictions on specific items (such as restricting Withdrawn items from filling requests, or limiting a specific item to **Patrons from this branch only**). If these rules allow an item to be a candidate to fill a request, only then do trapping preferences affect which request may be filled first. Trapping preference settings are also applied when offline files are uploaded, after the items have been checked in offline.

Note:

You can suppress holds processing for items checked in offline when the offline transaction file is uploaded. See [“Holds Processing at Upload”](#) on page 386.

Each branch can set a trapping preference or opt for none at all. Holds processing uses the trapping preference setting of the *item's assigned branch*. Follow these steps to set trapping preferences and other request queue management options.

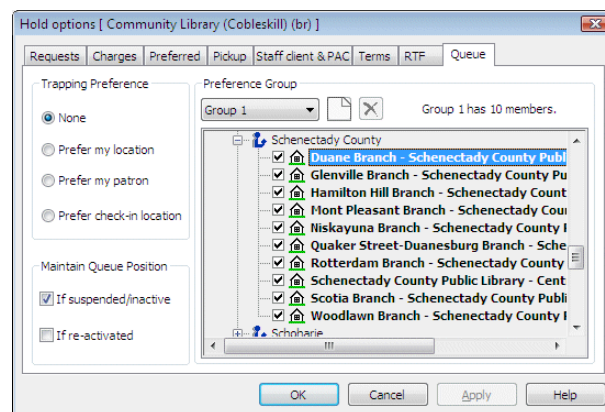
Note:

At the system level, you can set up optional trapping preference groups, which apply trapping preferences to a designated group of branches. You may find this feature useful in a consortium where various groups of organizations are far apart or have very different hold request policies. For instructions, see [“Set Holds options: Trapping preferences groups”](#) on page 308.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Request** tab in the details view.
2. Double-click **Holds options**.

The Hold Options dialog box - Requests tabbed page appears.

3. Click the **Queue** tab.



4. Select a trapping preference as follows:
 - **None** - The existing queue order is followed when an item that can fill a request is trapped during circulation.
 - **Prefer my location** - If an item's assigned branch matches the pickup branch of any request in the queue, fill that request ahead of the others. In effect, **Prefer my location** favors requests that keep or return an item to its assigned branch.
 - **Prefer my patron** - If an item's assigned branch matches a patron's registration branch of any request in the queue, fill that request ahead of others. In effect, this option favors requests that place your branch's items in the hands of your branch's patrons.

Note:

If your system has set up trapping preference groups (see “[Set Holds options: Trapping preferences groups](#)” on page 308) and you select **Prefer my patron**, the request will be directed to the first request for the group, not the first request for the patron’s branch.

- **Prefer check-in location** - If an item could fill a request where the pickup branch matches the check-in branch, fill that request ahead of others. In effect, this option favors requests where the item does not need to be shipped.
5. Specify how to handle the queue position of reactivated and suspended/inactive requests:
- **Maintain queue position for re-activated requests** - When this option is selected, not-supplied, expired, or cancelled requests regain their position in the holds queue when they are reactivated. That is, the request will continue to move up the queue as other requests are filled. This setting also applies to requests reactivated during check out or check in. If this option is not selected, the request is placed at the end of the queue when reactivated.
 - **Maintain queue position for suspended/inactive requests** - When this option is selected, and you have also checked **Permit suspended requests from PAC** (Staff client & PAC tabbed page - system level), suspended requests regain their position in the holds queue when they are reactivated. That is, the request will continue to move up the queue as other requests are filled. This setting also controls the queue position when a request placed with an activation date in the future becomes Active. If this option is not selected, the request is placed at the end of the queue when reactivated.
6. Click **Apply** to save your settings and continue to work with holds options, or click **OK** to save your settings and close the Holds options dialog box.

1-2-3

Set Holds options: Trapping preferences groups

If you choose to use a trapping preference (see “[Set Holds options: Trapping preferences, queue settings](#)” on page 306), you can extend the preference to consider a group of organizations, such as a group of branches from various libraries, all branches that belong to a library, or all the branches in a group of libraries. For example, the trapping preference **Prefer my location** would favor requests that keep or return the item to any branch in the group. You set up the groups at the system level using the grouping options on the Hold options dialog box - Queue tabbed page. (At the library and branch levels, the group settings are visible for your information, but are view-only.) Follow these steps to set up trapping preference groups.

1. In the Administration Explorer tree view, open the **Parameters** folder for the system, and click the **Request** tab in the details view.

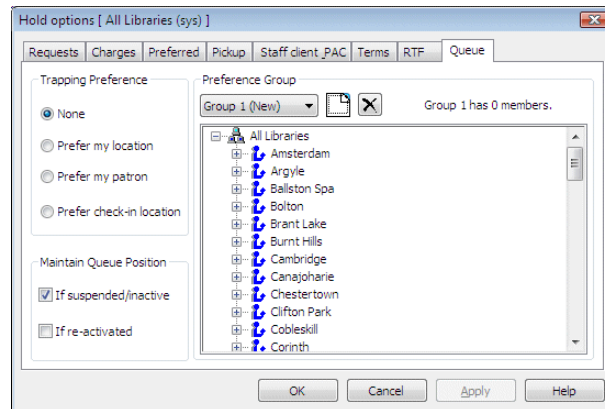
2. Double-click **Holds options**.

The Hold Options dialog box - Requests tabbed page appears.

3. Click the **Queue** tab.

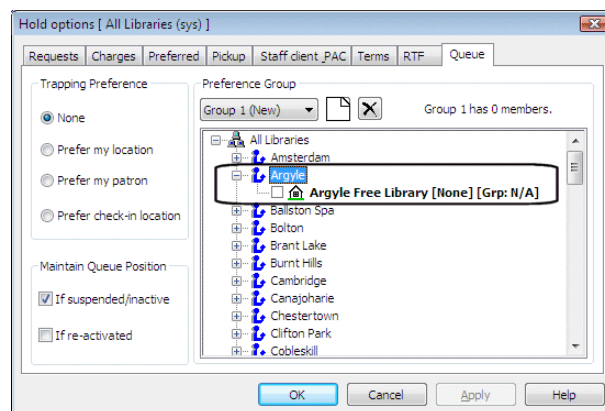
4. Click the new group icon .

The preference group drop-list displays the new group number, and the list of organizations becomes available so you can choose the organizations to add to the group.



5. To add a branch to the group, expand the branch's parent library in the list and check the branch.

- To select all the branches under a parent library at once, expand the parent library and click the library name or press the space bar.
- You can select branches from different libraries to place in one group.



A branch can belong to one group or no groups, but not to multiple groups. The information in brackets for a branch in the group list includes that branch's trapping preference setting and the group number, if any, to which the branch belongs. Although the branches in a group can have different trapping preferences, the matching process

occurs between the item and the group based on the setting of the item's assigned branch. You may want to coordinate trapping preferences in a group so that the results are more predictable.

Note:

After you have set up a group, you can select it in the **Preference Group** drop-down list to display the members of the group.

6. Click **Apply** to save your settings and continue to work with holds options, or click **OK** to save your settings and close the Holds options dialog box.

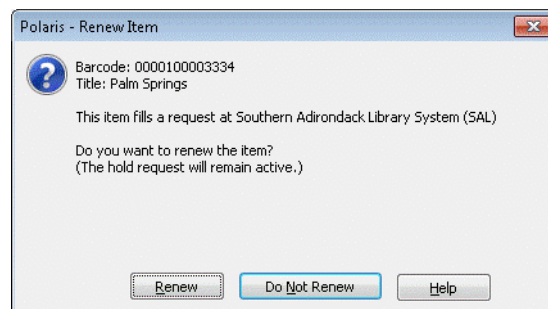
Related Information

Delete a trapping preference group - Select the group in the Preference Group drop-down list and click the delete icon .

Blocking Holds at Renewal

If an attempt is made to renew an item that is out but there are Active, Inactive, or Pending requests for that title, by default the renewal is blocked and a message is displayed. You can set a system-level Patron Services parameter, **Renewal: Block if there are holds**, to make this block message optional. The default setting is **Yes**, which blocks the renewal and displays the message.

When you set this parameter to **No**, the block message appears in the staff client when the item being renewed is the only item available to fill the request.



If other holdable and potentially eligible items are In, no dialog box appears and the item can be renewed. (The other In items could be identified by the next round of RTF processing and pulled to fill the request.) In PAC, the renewal is allowed in the same circumstances. But if the item selected for renewal is the only item available to fill a request, the renewal is not allowed.

Note:

If you choose to set this parameter to **No**, be aware that the system does not check the eligibility status of each In item at every branch. An item may be In and holdable, but not necessarily eligible to fill requests. So it is possible, although perhaps not very likely, to allow renewal on the only item that will fill the request even though other items are In, and thus delay the request.

Restricting Holds on Specific Items

You can restrict specific individual items from filling hold requests through controls in the item record itself. You can designate the item as non-holdable, or allow hold requests on the item only under certain circumstances. For example, you may want your videos to fill requests only for certain pickup libraries, but allow your books to fill any requests.

Note:

Items with a status of Provisional or Deleted are automatically filtered from holds processing.

1-2-3

Restrict holds on specific items

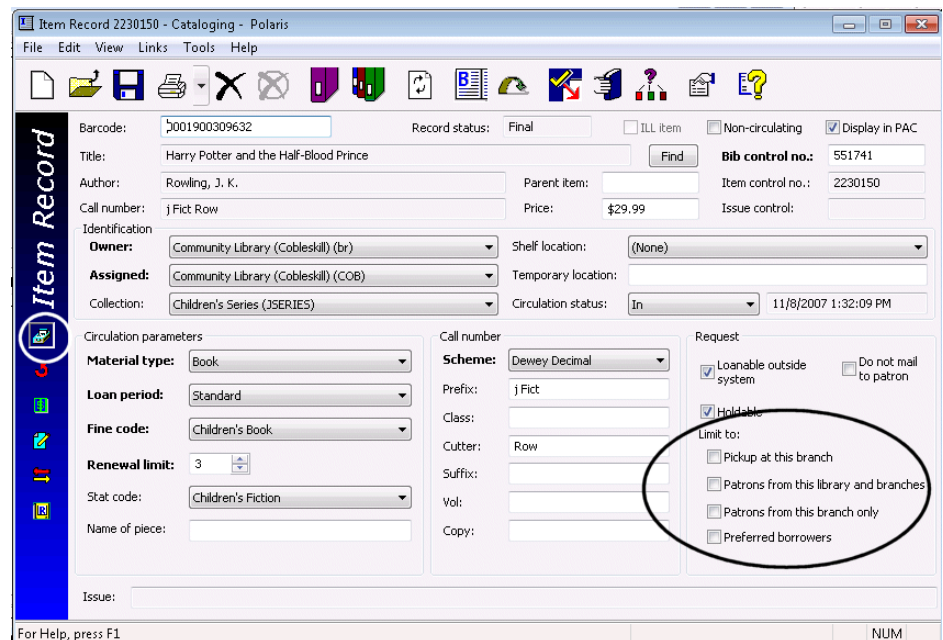
Follow these steps to restrict holds on specific items.

1. Search for and open the item record.

See “[Finding Polaris Records](#)” in the *Polaris Basics Guide 4.1R2*.

2. Select **View, Cataloging** or click .

3. To allow the item to be eligible for unrestricted hold requests, select the **Holdable** check box and clear all the **Limit To** check boxes.



Item Record 2230150 - Cataloging - Polaris

File Edit View Links Tools Help

Barcode: 001900309632 Record status: Final ☐ ILL item ☐ Non-circulating ☒ Display in PAC

Title: Harry Potter and the Half-Blood Prince Bib control no.: 551741

Author: Rowling, J. K. Parent item: Item control no.: 2230150

Call number: j Fict Row Price: \$29.99 Issue control:

Identification

Owner: Community Library (Cobleskill) (br) Shelf location: (None)

Assigned: Community Library (Cobleskill) (COB) Temporary location:

Collection: Children's Series (JSERIES) Circulation status: In 11/8/2007 1:32:09 PM

Circulation parameters

Material type: Book

Loan period: Standard

Fine code: Children's Book

Renewal limit: 3

Stat code: Children's Fiction

Name of piece:

Issue:

Call number

Scheme: Dewey Decimal

Prefix: j Fict

Class:

Cutter: Row

Suffix:

Vol:

Copy:

Request

☒ Loanable outside system ☐ Do not mail to patron

☒ Holdable

Limit to:

☐ Pickup at this branch

☐ Patrons from this library and branches

☐ Patrons from this branch only

☐ Preferred borrowers

For Help, press F1 NUM

4. To allow the item to be eligible for hold requests under restricted circumstances, select the **Holdable** check box and one (or certain combinations) of the following options:
 - **Pickup at** - Limit the item to filling hold requests only at a selected branch, not just the item's assigned branch. From this list, only one branch can be selected. Upon selection of this option, you can also select **Patrons from this library and branches** or **Patrons from this branch only**.

The branches that display for selection can be set in the **Holds: Item Pickup Branches** option located under **Parameters, Patron services**. The control can be set at the system, library and branch level.

Note:

If this option is set and the item assigned branch changes, the pickup option is unchecked.

- **Patron from this library and branches** - Limit the item to filling hold requests from patrons registered at the item's assigned branch library and associated branches. When you select this option, you can also select **Pickup at**.
- **Patrons from this branch only** - Limit the item to filling hold requests only from patrons registered at the item's assigned branch. When you select this option, you can also select **Pickup at**.
- **Preferred borrowers** - Limit the item to filling hold requests only where the pick-up library is on the Preferred lender list of the item's assigned branch. See ["Defining Hold Processing Options"](#) on page 289. When you select this option, you cannot select any other **Limit to** options.

5. Select **File, Save**.

Related Information

- **Restricting multiple items** - To restrict multiple existing item records in the same way, search for the records and place them in a record set. For example, you may want to restrict all DVDs to the assigned branch's **Preferred lender** list. Then use the bulk change function to set the **Preferred lenders** option for all the record set members. For more information about finding item records and limiting searches by material type, see [“Doing a Basic Search”](#) in the *Polaris Basics Guide 4.1R2*. For more information about bulk-changing item records, see [“Working With Multiple Records”](#) in the *Polaris Cataloging Guide 4.1R2*. You can set any item hold restrictions with bulk change.
- **Restricting new records** - To restrict holds on all new item records of a certain material type, create an item template for the material type with the **Preferred lenders** option selected (checked). Then use the template for all new item records of this material type.
- **Items relinked to a new bibliographic record** - If an item is linked to a different bibliographic record after an item-level hold request is placed, the hold request is updated with the new bibliographic information.
- **General information about item records** - See [“Creating Item Records”](#) in the *Polaris Cataloging Guide 4.1R2*.

Specifying Hold Status Descriptions

As a hold request moves through the processing cycle, the request status changes. The standard hold status descriptions are as follows:

- **Active** - When a hold request is placed in the queue, its status is automatically set to Active. All items that can fill the hold request are bound to it, and the items can be trapped to fill the request. The system is actively looking for items to fill the request.
- **Cancelled** - Cancelled hold requests remain in the database and visible on Polaris workforms. A Cancelled request cannot be filled. However, you can reactivate or delete it.
- **Expired** - If a hold request is not filled within the specified period of time, the request status automatically changes to Expired. (The current date is later than the Expiration date on the Hold Request workform.) An Expired request cannot be filled. However, you can reactivate or delete the request, or convert it to an interlibrary loan request.
- **Held** - A Held request means an item has been trapped to fill the request, and the circulation status is Held. The item is ready for the patron to pick up.
- **Inactive** - An Inactive hold request has an activation date in the future. The request does not appear in the queue, and an item cannot be trapped to fill the request until the activation date. You can cancel or delete an inactive request, or convert it to an interlibrary loan request.
- **Not-supplied** - If no items can fill the request (for example, if no items are attached to the bibliographic record), the request status is Not-supplied. You can delete the request or convert it to an interlibrary loan request. You can also reactivate a Not-supplied request, but if the reason it was not supplied has not changed, the request becomes Not-supplied again.
- **Out** - An item has been linked to the hold request, and the item's circulation status has changed to Out (that is, the item has been checked out). This status is useful in keeping track of items requested and circulated by Borrow by Mail.

Note:

This status is automatically enabled for organizations using Borrow by Mail and is displayed in the staff client and the PAC patron account (where it appears as **Sent**). Organizations who do not use Borrow by Mail can choose to display or suppress the display of requests with the status of Out. On the Holds options dialog box - Staff & PAC tabbed page (**Request** parameters), select (check) the option **Display request status "Out"**. The setting for the workstation's logon branch controls the display in the staff client, while the setting for the patron's registered branch controls the display in the PAC patron account.

- **Pending** - When an active request can be filled by an item with a status of In at your library, or the request has been routed to another library that has the item with a status of In, the status changes to Pending. If none of the items there have a status of In, the request keeps its Active status, and items can be trapped to fill the request.

- **Shipped** - A Shipped hold request means that an item was trapped at a branch other than the pickup branch, and is being shipped to the pickup branch.
- **Unclaimed** - If the requesting patron does not pick up the held item within the specified period of time, the hold request status automatically changes from Held to Unclaimed. (The current date is later than the Unclaimed date on the Hold Request workform.)

The status descriptions are displayed in various contexts in the staff client, in the PAC patron account, and in Polaris ExpressCheck. The illustration shows the Patron Status workform - Requests view.

Patron Status - 357291 - Holds - Polaris

Barcode: 987654321 Name: Timothy James Farsad

Acct charges: \$0.00 Patron code: Regular
 Acct credit: \$21.20 Registered branch: Community Library (Cobleskill)
 Items out: 3 Expiration date: 2/10/2013
 Total overdue: 0 Registration date: 2/10/2010
 Claims/Lost: 0/0 Notification option: Email Address
 Items held: 0 Last activity date: 2/20/2013
 Total holds/ILL: 2/0 Address: 419 First St

Holds

Polaris requests:

Author	Title	Format	Call Number	Activation Date	Status	Pickup Branch	Qu...	Hold Until Date	Gr...
Grisham, John.	The broker [large print]	Large Print		2/11/2013	Active	Community Lib...	1		
Meyers, Belle.	Knitting know-how	Book		2/12/2013	Active	Community Lib...	1		

ILL requests:

Author	Title	Format	Activation Date	Status	Item	Pickup Branch

For Help, press F1 NUM

You can change the description text in Polaris Administration, in the database table **Hold Request Statuses**. The table is available at the system, library, and branch levels, but your changes affect all organizations in the system.

1-2-3

Edit hold request status descriptions

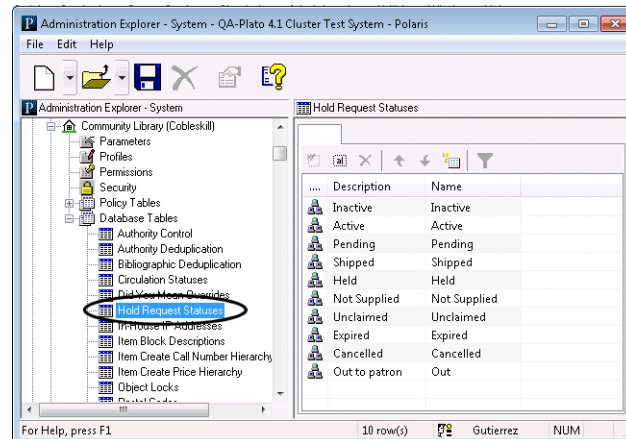
Follow these steps to edit the display descriptions for hold request statuses.

Note:

These System Administration permissions are required to view and modify this table: **Access administration: Allow; Access tables: Allow; Modify hold status table: Allow.**

1. In the Administration Explorer tree view, open the **Database Tables** folder for the organization, and select **Hold Request Statuses**.

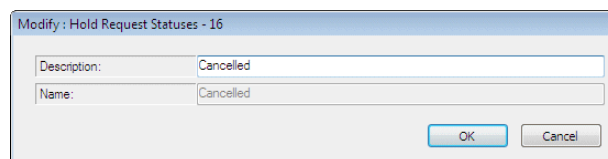
The Hold Request Statuses table is displayed in the details view.



2. To modify a description, follow these steps:

- a) Select the hold request status entry and click .

The Modify Hold Request Statuses dialog box appears.



- b) Type the new description in the **Description** box.

Modify the description so that it is brief and understandable to everyone, including patrons. The modification affects only the description that is displayed; it remains associated with the underlying hold request status that appears in the **Name** box. Reports use the status name, not the description.

- c) Click **OK**.

Related Information

- **Processing hold requests (staff client)** - See [“Working with Hold Requests”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Deleting bibliographic or item records with linked hold requests** - Two system-level Cataloging parameters control whether a bibliographic or item record can be deleted when there are hold requests attached to it:
 - **Bibliographic record delete: Allow if there are holds** - The default setting is **No** (do not allow bibliographic record deletion if hold requests are attached). When this option is set to **Yes**, if the record is linked to one or more hold requests with a status of Active, Pending, or Inactive, and no other circumstances prevent the deletion, the deletion is allowed and the request status is set to Not Supplied. A canceled hold notice is generated according to your library's settings for this type of notice. Regardless of your setting for this parameter, the deletion will be allowed and the request deleted if the request has a status of Not-supplied, canceled, Expired, or Out. The deletion will not be allowed if the request status is Unclaimed, Shipped, Held.
 - **Item record delete: Allow if there are holds** - The default setting is **No** (do not allow item record deletion if hold requests are attached). When this option is set to **Yes**, if the record is linked to one or more bibliographic-level or item-level hold requests with a status of Active, Pending, or Inactive, and no other circumstances prevent the deletion, the deletion is allowed and the request status is set to Not Supplied. A canceled hold notice is generated according to your library's settings for this type of notice. As with the bibliographic record parameter, the deletion will be allowed and the request deleted if the request has a status of Not-supplied, Canceled, Expired, or Out. The deletion will not be allowed if the request status is Unclaimed, Shipped, Held.

Setting Up ILL Requests

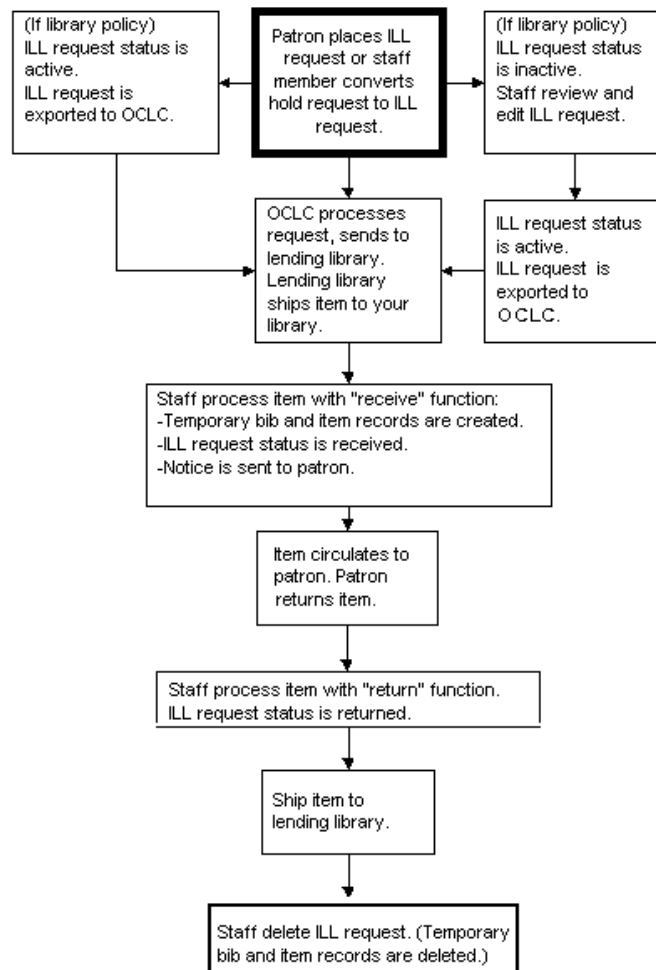
An interlibrary loan (ILL) request is filled by routing the request to potential lenders outside of the library system. You can set Polaris to allow interlibrary loan requests from the staff client, PAC, or both.

Polaris ILL requests can be processed automatically. Automatic processing is brokered through OCLC's ILL Direct Request Service. Polaris customers who are OCLC members can use the OCLC Direct-to-Review service. With this service, ILL requests are sent to a review file at OCLC where they are reviewed by library staff and directed to OCLC lending libraries.

Note:

You can also allow ILL requests and process them manually or through a third-party ILL fulfillment system, without OCLC membership.

If you participate in OCLC's service, you can specify whether requests are sent directly to OCLC's Direct-to-Review service (unmediated), or reviewed by library staff and manually exported to OCLC (mediated).



Use the Request parameter **ILL options** to specify whether ILL requests are mediated or unmediated, set any restrictions, and enable the OCLC connection. You can set most ILL options at the system, library, or branch level. The parameter is available from the Administration Explorer and the organization workflow.

Bibliographic and Item Records for ILL Items

When an item that fills an interlibrary loan request arrives at the library, staff receive the item in Polaris using a special ILL item template. Temporary bibliographic and item records are created from the template to track the item in Polaris. (For more information about this process, see [“Receiving Interlibrary Loans”](#) in the *Polaris Patron Services Guide 4.1R2*.) Later, these temporary records are automatically deleted when the ILL request is deleted. Bibliographic and item record deletion for ILL requests honors the settings for the Cataloging profiles **Retain deleted bibliographic records** and **Retain deleted item records** for the item’s assigned branch:

- If both **Retain deleted bibliographic records** and **Retain deleted item records** for the item’s assigned branch are set to **Yes**, the records are retained (deleted provisionally) until purged. They cannot be undeleted, however.
- If one of the profiles is set to **No** and the other is set to **Yes**, both the bibliographic and item record will be immediately deleted and purged.
- If both **Retain deleted bibliographic records** and **Retain deleted item records** for the item’s assigned branch are set to **No**, the records are immediately deleted and purged.

When an ILL bibliographic or item record is marked for deletion, the “marked for deletion” transaction is logged. When an ILL bibliographic or item record is purged (physically deleted), the transaction is logged as an “ILL delete.”

Note:

Bibliographic and item records for ILL items cannot be deleted manually.

ILL Requests from PAC

If you choose to allow patrons to place ILL requests from PAC, the **Place Request** button appears for titles in remote database search results. When the patron clicks **Place Request** and logs in, the system checks for settings that block hold requests from PAC (such as patron blocks, duplicate requests, and request limits). It also checks for separate blocks specifically for ILL requests. If the request is blocked for any of these reasons, the appropriate message is displayed. If the request passes these checks, the system then checks to see if any duplicate titles are available for requests in the local database. If matching local titles are detected and one or more is available, the system displays a message that includes the options to continue the ILL request for the remote title, place a request on the local title, or cancel. If the patron chooses to place the local request, the ILL

process stops and the system creates a hold request. If the patron chooses to proceed with the ILL request, the system processes the request as an ILL request.

Note:

You can suppress the **Place Request** button for selected types of material. Your settings affect search results in both local and remote databases. See ["Suppressing Request and Availability Options"](#) in the *Polaris Public Access Administration Guide 4.1R2*

1-2-3

Set up interlibrary loan request processing

Follow these steps to allow staff (and patrons, if you choose) to request interlibrary loans.

Note:

If you plan to use OCLC's ILL Direct Request service and your library is not already an OCLC member, establish an account with Direct Request Service to use the Direct-to-Review service. Contact the OCLC regional office. The setup in Polaris requires the IP address and your OCLC log-in name and password for the service.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and click the **Request** tab in the details view.
2. Double-click **ILL options**.

The ILL Options dialog box - Requests tabbed page appears.

3. To permit ILL requests from Polaris PowerPAC, follow these steps:

Note:

For details about PAC processing, see ["ILL Requests from PAC"](#) on page 320.

- a) Select the PAC requests **Enable** check box.

Note:

When a patron requests a title from remote database (Z39.50) search results and logs on, a message regarding ILL requests is displayed according to the setting for the patron's registered branch. The default message is **You are about to place an Inter-Library Loan request for an item from a remote library system. If your library charges for Inter-Library Loan requests, your account will be charged accordingly. Do you want to place this request?** You can customize and translate the message using Polaris Language Editor (WebAdmin). The message string ID is **ILL_TEXT_REQINFO** (ILL "product"). For more information about using Polaris Language Editor to customize and translate messages, see the *Polaris Language Editor (WebAdmin) Guide*, or Language Editor online Help.

- b)** If you will use OCLC and you want your staff to review all ILL requests made by patrons before they are sent to OCLC, select the **Mediate all** check box.

- c)** Click **Apply**.

Important:

The settings for the patron's registered branch determine whether the patron can place an ILL request from the PAC. You should also set up remote databases as PAC search targets. See "[Registering Remote Resource Servers](#)" in the *Polaris Administration Guide 4.1R2* and "[Managing Federated Search Targets](#)" in the *Polaris Public Access Administration Guide 4.1R2*.

- 4.** To allow library staff to create ILL requests in the staff client, select the Staff requests **Enable** check box, and click **Apply**.
- 5.** To place limits on ILL requests, click the **Restrictions** tab and do the following steps:
 - a)** If you will use OCLC and you want your staff to review ILL requests converted from hold requests in the staff client, select the **Hold-to-ILL is mediated** check box.

If the check box is cleared, the converted ILL requests are automatically sent to OCLC.
 - b)** To prevent one or more categories of patrons from requesting interlibrary loans, select the check box for each appropriate patron code in the **Patron codes to exclude** list.
 - c)** In the **Need-by** box, set the default number of days by which an ILL request should be filled.
 - d)** In the **Held Period** box, specify how long an item is held for a patron to pick up before being returned to the lending library. The system takes into account the library's closed dates and days when calculating this period.

- e) (System level only) Choose a block option:
 - **Over 2nd level fine amount** - The patron is blocked if the money owed is over the 2nd level fine amount set by the patron's registered branch, and a block message is displayed in PAC.
 - **Over [amount]** - Select this option and set an amount. The patron is blocked if the money owed is *greater than or equal to* the amount you specify, and a block message is displayed in PAC. This is the default setting. The default amount is \$0.01, which blocks the request if the patron owes any money at all.
 - f) Click **Apply**.
6. (OCLC subscribers only) To set up your connection to OCLC's ILL service, click the **OCLC** tab and do these steps:
- a) Select the **Enable OCLC connection** check box to indicate you are using the OCLC ILL service provider.
 - b) In the **OCLC Symbol** box, type the library mnemonic for the system, library, or branch that has the account with OCLC.
 - c) (System level only) In the **Polling interval** box, specify how often (in minutes) Polaris should send ILL requests to OCLC. The default setting is 15 minutes.
 - d) In the **Address and port** box, type the IP address and the port number (*IP address:port number*) of the server where Polaris sends the ILL requests. Do not include **http://**.
 - e) In the **Login name** box, type the login identifier for the OCLC server.
 - f) In the **Password** box, type the password for your OCLC account.
7. Click **Save** to submit your settings.

The Explorer or workflow is displayed.

Important (OCLC Subscribers only):

The Polaris Application Server handles ILL direct requests to OCLC. If your application server name changes, enter the new Polaris Application Server name in the system-level Request parameter **ILL: Computer designated for sending OCLC/ILL direct requests**.

Related Information

- **Maximum number of active ILL requests for a patron can have** - See ["Defining Loan and Request Limit Blocks"](#) on page 332.
- **Loan limit for ILL items** - See ["Defining Loan Periods"](#) on page 213.
- **Fines for ILL items** - See ["Defining Fines and Fees"](#) on page 225.
- **Alert message at bulk check-in** - See ["Set Holds options: Enabling, Item Status Restrictions, First Available Copy"](#) on page 291.
- **Managing interlibrary loans in the staff client** - See ["Working with Interlibrary Loans"](#) in the *Polaris Patron Services Guide 4.1R2*.

Defining Circ and Request Limit Blocks



Blocks interrupt circulation transactions, such as check outs, renewals, and hold requests. A threshold value determines the limit that causes a block to interrupt the transactions. Most blocks can be overridden at the discretion of the library staff member.

You can set up circulation blocks related to item records (for example, the item does not circulate) and patron records (for example, the patron owes money or has borrowed too many items). You can also set loan and request limits that trigger blocks based on patron codes and material types. Separate settings control blocks on patron-initiated renewals from the PAC or inbound telephony service. Polaris also provides the ability to block a patron from checking out or renewing materials when an associated patron record is blocked; you define default settings for this feature in Polaris Administration.

Note:

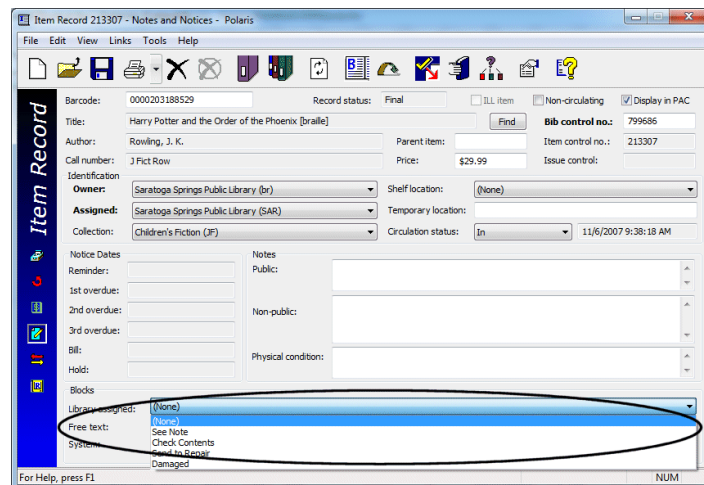
If your system includes self-check units, you set up blocks specifically for circulation transactions at the self-check units. For more information about SIP2 units, see ["Setting Up SIP Self-Check Circulation"](#) on page 451. For Polaris ExpressCheck, see the *Polaris ExpressCheck Administration Guide*.

See the following topics:

- ["Defining Item Blocks"](#) on page 325
- ["Defining Patron Block Descriptions"](#) on page 328
- ["Defining Loan and Request Limit Blocks"](#) on page 332
- ["Calculating and Blocking for Estimated Accrued Fines"](#) on page 340
- ["Defining Material Type Group Limits"](#) on page 348
- ["Defining Patron-Initiated Circulation Blocks"](#) on page 352
- ["Associated Patron Blocking"](#) on page 356

Defining Item Blocks

An item block stops circulation based on a setting in the item record. The **Library assigned** box on the Notes and Notices view of the Item Record workflow lists the standard, library-assigned block descriptions (for example, **Be sure all parts are present**). The blocks available in the list and the order in which they appear depend on the item block description settings for the library named in the **Assigned** box on the Item Record workflow. The settings of the item's assigned branch also control the blocks available for item bulk change.



Note:

When you are bulk-changing library-assigned blocks in an item record set, you must first select a branch because library-assigned block choices depend on the item's assigned branch.

You define the standard item blocks in the Item Block Descriptions database table. You can standardize item block descriptions among all organizations, or you can have different descriptions for each organization. You can define them at the system, library, and branch levels, but they are assigned to a specific branch when you define them, and are not inherited from a parent organization. This table can be displayed on an organization workflow or with the Administration Explorer. When you open the table at the system level, you can view, add, change, and delete item block descriptions for all branches. At the library level, you can view, add, change, and delete item block descriptions for the branches associated with the library. At the branch level, you can view, add, change, or delete item descriptions for the branch, even if the entry was added at a higher level.

Note:

These System Administration permissions are required to modify this table:
Access administration: Allow, Access tables: Allow, Modify item block descriptions table: Allow.

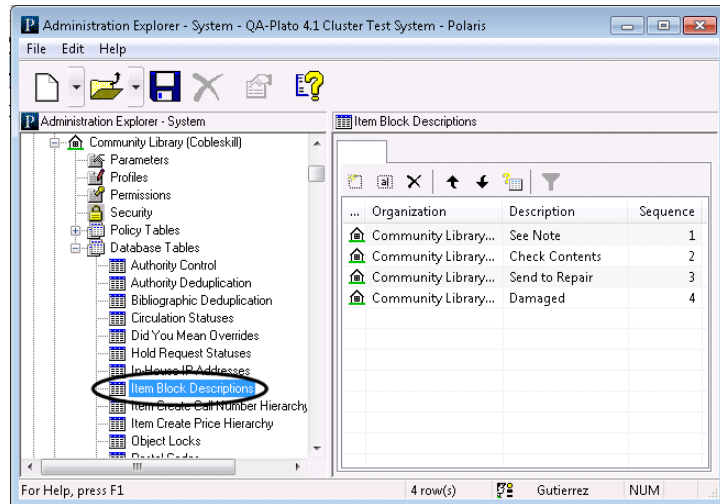
1-2-3

Add an item block description

Follow these steps to add an item block description in the Item Block Descriptions database table.

1. In the Administration Explorer tree view, open the **Database Tables** folder for the organization, and select **Item Block Descriptions**.

The Item Block Descriptions table is displayed in the details view.



2. Click  to display the Insert Item Block Descriptions dialog box.

Organization: Community Library (Cobleskill)

Description:

Sequence:

*Note: Insertions for this table are limited to Branch organizations.

OK Cancel

3. Select the branch that needs the item block description in the **Organization** list.

Note:

If the Item Block Descriptions table is opened at the branch level, only the branch name is displayed in the **Organization** list.

4. Type the text describing the item block in the **Description** box.

Note:

If the assigned branch is changed for an item with a library-defined block, the system checks whether there is matching block description text for the former and newly assigned branch. If so, the block is retained. If there is no match, the block is set to **None**.

5. Click **OK** on the dialog box.

The Item Block Descriptions dialog box closes and the new entry is displayed in the policy table. The status bar indicates that the modification is pending.

6. Select **File, Save** to save your changes.

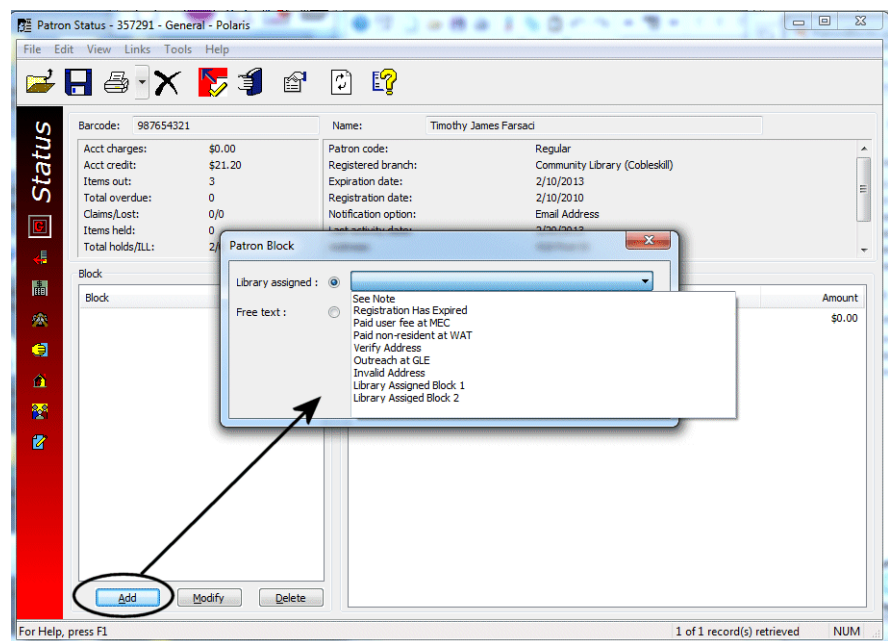
The status bar indicates that the record is saved.

Related Information

- **Order the block display** - Select table entries and click  or . The order of blocks in the table determines their display order when a block is added to an item record and when blocks are displayed at check-out.
- **Modify a table entry** - Select the entry, click , and change the description. Any changes are immediately applied to every item record that used the original block. If you need to assign the entry to another organization, delete the incorrect entry and add a new item block description for the desired organization.
- **Delete a table entry** - Select the entry and click . However, you cannot delete a block description if the block is currently assigned to an item.

Defining Patron Block Descriptions

A patron block (also called patron stop) interrupts check-out, renewal, or placement of a hold request based on certain conditions in the patron record. Among these conditions are library-assigned blocks. When a staff member adds a block to a patron record from the Patron Status workflow, the **Library assigned** box on the Patron Block dialog box lists the standard, library-assigned patron block descriptions (for example, **Address correction required**) based on the block descriptions set up for the patron's registered branch. The staff member can choose a library-assigned block from the list (or type a free-text block).



Note:

When you are bulk-changing library-assigned blocks in a patron record set, you must first select a registered branch because library-assigned block choices depend on the patron's registered branch. When you search for patron records by library-assigned blocks with the Polaris Find Tool, the blocks are determined by the settings for your current log-on branch.

You define the standard library-assigned patron blocks in the Patron Block Descriptions policy table. You can standardize patron block descriptions among all organizations, or you can have different descriptions for each organization. You can add new blocks at the system or library level, but each branch selects which blocks to use. This table can be displayed on an organization workflow or with the Administration Explorer. When you open the table at the system or library level, you can view, add, change, and delete patron block descriptions. At the branch level, you can view, change, or delete the descriptions, select blocks for use at that branch, and determine their display order. In addition, of the blocks selected for use at

a branch, you can designate which ones trigger a generic block message in the PAC patron account summary. (A free text block in the patron record triggers the same message in the PAC patron account.)

Note:

These System Administration permissions are required to modify this table:
Access administration: Allow, Access tables: Allow, Modify patron stop descriptions table: Allow.

You can also set Polaris to block patron accounts based on current and total claims. See [“Set up blocks for claims”](#) on page 331.

For more information about patron record blocks and staff workflows, see [“Working with Blocks \(Stops\)”](#) in the *Polaris Patron Services Guide 4.1R2*.

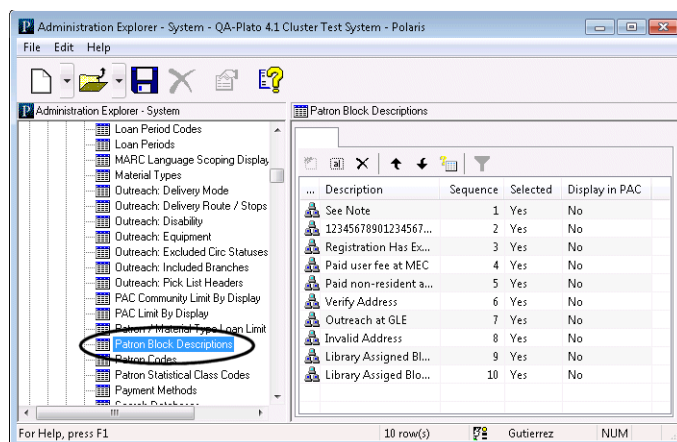
1-2-3

Add, select, and order patron block entries

Follow these steps to add a patron block to the Patron Block Descriptions table, then select blocks for branch use, determine their display order, and designate whether they trigger display text in the PAC patron account.

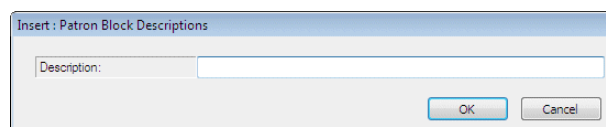
1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Patron Block Descriptions**.

If you open the table at the system or library level, you can add new blocks. If you open the table at the branch level, the table includes controls for selecting and ordering blocks, and specifying which ones should display a message in the PAC patron account.



2. (System or library level only) To add a new block, follow these steps:

- a) Click  to display the Insert Patron Block Descriptions dialog box.



- b) Type text describing the patron block in the **Description** box.

Note:

The description can be up to 255 characters long. For best display results, limit your description to fewer than 40 characters.

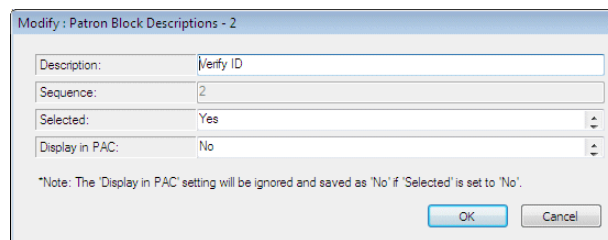
- c) Click **OK** on the dialog box.

The Insert Patron Block Descriptions dialog box closes, and the new patron block entry is displayed in the table. The new block is displayed in the table for all organizations. Each branch can decide whether to use the block (set to **Yes** by default), and determine the order of blocks in lists in staff client dialog boxes and user controls.

3. (Branch level only) To select or de-select blocks for use by the branch, or to change their Display in PAC status, follow these steps:

- a) Double-click the block that needs the change, or select the block and click .

The Modify Patron Block Descriptions dialog box opens.



- b) Select **Yes** or **No** in the **Selected** box to indicate whether the new block should be selected for use at the branch.

- c) Select **Yes** or **No** in the **Display in PAC** box to change that status.

The **Selected** box must be set to **Yes** if you want to set **Display in PAC** to **Yes**. That is, a block must be set to display for the patron's registered branch in the staff client if you also want to display the library-block text in the PAC patron account summary.

Note:

You can set the display text with the PAC profile **Patron library assigned and free text block default text** (maximum 255 characters). The profile is available at the system, library, and branch levels. The default setting is **Library assigned block**. The same text is displayed for any library-assigned block you set to display in PAC, and when the patron record has a free text block.

- d) Click **OK**.

Note:

You can also change the description at the system, library, or branch level. Limit your changes to correcting spelling or using a different choice of words for the same type of patron block. Any changes are immediately applied to all records using the original patron block description.

4. (Branch level only) To order the block display, select any block in the table with a status of **Yes** and click  or .

The order of blocks in the table determines their display order in the New Block dialog box when a block is added to a patron record, when blocks are displayed at check out, and when multiple blocks are listed in the Delinquent Patrons Report.

5. Select **File, Save**.

Related Information

Delete a table entry - Select the entry and click . You cannot delete a block description if the block is currently assigned to a patron.

1-2-3

Set up blocks for claims

When a patron receives an overdue notice or a bill, the patron may claim that she never had an item or that the item was returned. The claim is recorded in the patron's record. You can set Polaris to block transactions for patrons who have too many claims. Follow these steps to block patron accounts automatically based on current and total claims.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Claims: Number patron can have at one time**, and type or select the number of *current* (unresolved) claims a patron can have before the patron's account is blocked.
3. Double-click **Claims: Total number allowed**, and type or select the number of *total* (lifetime) claims a patron can have before the patron's account is blocked.

Note:

Staff with appropriate permission can reset this count to 0. See ["Reset a patron's total claims count"](#) in the *Polaris Patron Services Guide 4.1R2*.

4. Select **File, Save**.

Related Information

Overdue fines on claimed items in estimated fines - ["Set up estimate accrued fine calculations and blocking"](#) on page 346

Defining Loan and Request Limit Blocks

Loan and request limit blocks interrupt circulation transactions based on the thresholds you set for patron overdues and fines, item limits, and request limits. Each branch may set different limits, and the limits can be different for each patron code. In the staff client, a check-out clerk with appropriate permission may override a loan or request limit block (except the second-level fine block). In the PAC, a message is displayed and the renewal is stopped. You can specify whether request limits block PAC requests.

Important:

The system-level Patron Services parameter **Consortium Circulation** determines which branch's settings are used for loan and request limit blocks. For request limits, the "transacting branch" is the pick-up branch for the request, not the staff member's logged-in branch. See ["Governing Library for Circulation Transactions"](#) on page 209.

Patron Overdue Limits

A patron has too many overdue items, based on the number of items and the patron code. These blocks occur when the patron attempts to check out or renew an item.

Fine Limits

Blocks for unpaid fines are based on the total amount the patron owes and the patron code. These blocks occur when the patron attempts to check out or renew an item. You can define two fine limit levels. The first (minor) fine limit block allows libraries to remind patrons that fines are owed, but does not disrupt a busy circulation desk for minor fines. The second (major) fine a separate permission is required to continue the transaction. See ["Defining Loan and Request Limit Blocks"](#) on page 332.

Example:

The first fine limit may be set to \$.10 (10 cents) the second to \$10.00. If the patron owes over \$.10 but is not over \$10.00, a courtesy block, not requiring permission to continue, will display. If the patron owes over \$10.00 a different block message appears. Staff will require a separate permission to continue.

Note that all threshold blocking is based on values up to and including the value set in the System Administration control. Setting a fine limit of \$10.00 or an item limit of 15 means that the patron can have up to \$10.00 in fines or up to 15 items, but will be blocked at \$10.01 or 16 items.

You can manipulate the settings for special conditions:

- **Block for any fines** - Set the first fine limit to 0.00 to block the transaction if the patron has *any* unpaid fines. The permissioned staff member can bypass the block at her discretion. To require a supervisor override for any unpaid fines, set the first fine limit to 999999.99 and the second limit to 0.00.
- **Do not block for fines** - Setting the first or second level fine limit to 999999.99 effectively suppresses the block at that level.
- **Fine notices** - If your library uses fine notices, set the second level fine amount to a value equal to or less than the setting in the **Minimum balance** box for fine notices (Notification options). This combination of settings blocks the patron at circulation before a fine notice is sent, which helps prevent additional fines after notification. For more information about fine notices, see [“Fine Notices”](#) on page 428.

You can choose to include estimated accrued fines in the blocking calculation. See [“Calculating and Blocking for Estimated Accrued Fines”](#) on page 340.

Item (Loan) Limits

A patron has too many total items, too many items of a specific material type, or too many course reserve items borrowed at the same time. For example, if the items out limit is set to 10, the block occurs if the patron attempts to borrow an eleventh item without returning any of the other ten items. These blocks occur as each item is scanned at check-out, but not at renewal. To set these limits, see [“List and modify loan and request limit entries”](#) on page 336. You can also set limits on groups of material types for specific patron codes. See [“Defining Material Type Group Limits”](#) on page 348.

Total Requests and Request By Material Type Limits

These blocks occur in the PAC and at SIP self-check stations when a patron has too many requests (status of Active, Inactive, or Pending, and optionally Held/Shipped) or too many requests for a specific material type at the same time. The request limit blocks occur in the staff client when you have selected the holds option **Block in staff client** (see [“Set Holds options: Alerts and blocks”](#) on page 298). If you have selected this option, a block message is displayed in the staff client, and staff members have the option of overriding the block. The request is then placed as Active. If the **Block in staff client** option is not selected, no block message is displayed and the request is placed as Active (or whatever status is appropriate), regardless

of any request limits you set. Patrons are automatically blocked in the PAC and at the SIP self-check station when they try to place a request that is one over the specified limit.

In the case of material type limits, for item-level requests, the limit for the item's material type is checked directly. Items with valid barcodes and items without barcodes but with a status of On Order or In Process are included in the limit check. For bibliographic-level requests, the limit for each attached item's material type is checked, and the Holds Options setting **If all material limits are exceeded set to Not Supplied** determines how the request is handled in the staff client when a patron reaches the hold limit by material type. If this option is checked, and all the items attached to the bibliographic record have the same material type, a block message is displayed in the staff client, and staff members have the option of overriding the block. If the block is overridden, the request is placed with a status of Not Supplied. The Not Supplied reason is **All items denied by system**. If some items have the limited material type and some do not, a message is displayed and those of the limited material type are automatically denied by the system. If this option is not checked, and all the items attached to the bibliographic record have the same material type, a block message is displayed in the staff client, and staff members have the option of overriding the block. If the block is overridden, the request is placed with a status of Active. If some items have the limited material type and some do not, a message is displayed and those of the limited material type are automatically denied by the system. See [“Set Holds options: Alerts and blocks”](#) on page 298.

For bibliographic-level requests where no items are attached to the bibliographic record, the limit is not checked. You can allow or deny holds on these items with a separate Holds Options setting. See [“Set Holds options: Alerts and blocks”](#) on page 298.

Note:

The system includes a patron's inactive requests when calculating whether the patron will exceed the total request limit or request by material type limit. This prevents patrons who are near the limit from suspending a number of requests in order to place more. The limit is also checked when a cancelled hold is reactivated.

The Hold request workform - Notes view displays a blue icon  for the item if the system denied the request on that item, or a red icon  if a staff member denied the request.

Governing Library for Loan and Request Limits

The governing library for patron blocks determines which branch's request limit settings are used (see [“Governing Library for Circulation Transactions”](#) on page 209).

Example:

Governing library = Transacting branch

The request is placed from branch A, the patron is from branch B and the pick-up branch is branch C. Branch C's limit settings apply because it is the transacting branch.

Governing library = Patron branch

The request is placed from branch A, the patron is from branch B and the pick-up branch is branch C. Branch B's limit settings apply because it is the patron's branch.

Since the same governing library setting applies to both the loan and request limits, you may want to coordinate the settings for total item limits and total request limits. Some libraries set these limits to an equal value, reasoning that a patron should not be able to request an item if the patron cannot check it out. Alternatively, you may want to set the hold request limit without regard to the item limit, since the number of items checked out may change by the time a request is filled.

Setting Up Loan and Request Limit Blocks

The loan and request limit blocks are set with the Patron/Material Type Loan Limit Blocks policy table. They can be defined from the system, library, and branch levels, but are always assigned to a specific branch. They are not inherited from a parent organization. The table is displayed with the Administration Explorer only. When you open this table at the system level, you can view and change loan and request limits for all branches in Polaris. At the library level, you can view and change loan and request limits for the branches associated with the library. At the branch level, you can view and change the limits for the selected branch. Each organization can change limit blocks assigned specifically to the organization, even if the entry was added at a higher level. New patron and new material type entries are added automatically to the Patron/Material Type Loan Limit Blocks policy table:

- When a new patron code is added to Polaris, a patron loan limit entry is added automatically for every branch.
- When a new material type is added to Polaris, a material loan limit entry is added automatically to the table for every patron loan limit entry for each branch.
- When a new branch is added to Polaris, all patron and material type entries are added automatically to the table for every patron code and material type.

The new entries use default values as the thresholds. You can change the values after the entries are added to the table. You cannot add entries to or delete entries from the Patron/Material Type Loan Limit Blocks table.

Note:

These System Administration permissions are required to modify this table:
Access administration: Allow, Access tables: Allow, Modify patron/material type loan limit blocks table: Allow.

All threshold blocking is based on values up to and including the value set in the System Administration control. Setting a fine limit of \$10.00 or an item limit of 15 means that the patron can have up to \$10.00 in fines or up to 15 items, but will be blocked at \$10.01 or 16 items.

1-2-3

List and modify loan and request limit entries

Follow these steps to view and modify the entries in the Patron/Material Type Loan Limit Blocks table.

Important:

The system-level Patron Services parameter **Consortium Circulation** determines which branch's settings are used for loan and request limit blocks. For request limits, the transacting branch is considered to be the pick-up branch for the request, not the staff member's logged-in branch. For details, see ["Governing Library for Loan and Request Limits"](#) on page 335. For information about consortium circulation (governing library) settings, see ["Governing Library for Circulation Transactions"](#) on page 209.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization.
2. Select **Patron/Material Type Loan Limit Blocks**.

The Patron/Material Type Loan Limit Blocks table is displayed in the details view.

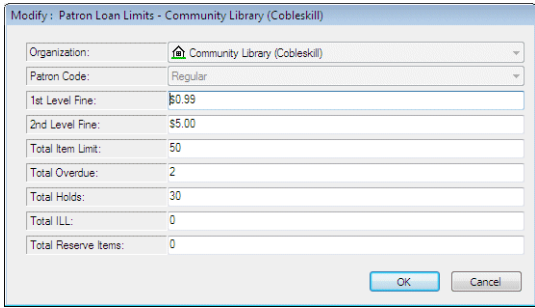
Organization	Patron Code	1st Level Fine	2nd Level Fine	Total Item Limit	Total Overdue	Total
Community ...	Regular	\$0.99	\$5.00	50	2	
Community ...	Juvenile	\$0.99	\$5.00	50	2	
Community ...	Juvenile with Rest...	\$0.99	\$5.00	50	2	
Community ...	Staff / Board	\$0.99	\$5.00	50	2	
Community ...	Outreach	\$0.99	\$5.00	50	2	

Organization	Patron Code	Material Type	Maximum Item Limit	Hold Limit
Communi...	Regular	Book	50	30
Communi...	Regular	New / Popular Book	50	30
Communi...	Regular	Video	50	30
Communi...	Regular	Childrens Video	50	30

The top portion of the table shows the limits for each patron code, organized by branch. Use the horizontal scroll bar to see all the limit categories (**1st Level Fine**, **2nd Level Fine**, **Total Overdue**, **Total Holds**, **Total ILL**, **Total Reserve Items**.) Use the vertical scroll bar to see all the branch/patron code entries.

3. To modify the limits for a patron code, select the branch/patron code entry in the top portion of the table, and click .

The Modify: Patron Loan Limits dialog box appears.



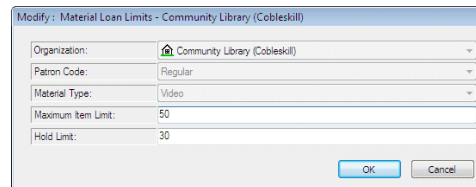
Organization:	Community Library (Cobleskill)
Patron Code:	Regular
1st Level Fine:	\$0.99
2nd Level Fine:	\$5.00
Total Item Limit:	50
Total Overdue:	2
Total Holds:	30
Total ILL:	0
Total Reserve Items:	0

- a) Type new values for the limits you want to modify, and click **OK**:
 - **First and second level fines** - See “[Fine Limits](#)” on page 332. If both first and second level fine limits are set to identical values, two blocks are displayed during a transaction. Identical settings for both fine limits are not recommended unless you are suppressing all blocks for unpaid fines. In that case, set both limits to 9999.99.
 - **Total limits** - For **Total Item Limit**, **Total Overdue**, **Total Holds**, **Total ILL**, and **Total Reserve Items** (course reserves), you can type a high number, such as **999**, if you do not want to block circulation based on that specific total. For example, if you do not want to block circulation for this patron code based on how many overdue items the patron has, type **999** in the **Total Overdue** box. The number in **Total overdue items** is the sum of items overdue and items long overdue, and the patron is blocked when his total overdue items exceeds the number you specify. The limit for **Total Item Limit**, **Total Overdue**, **Total Holds**, and **Total ILL** is 3,000. The limit for **Total Reserve Items** is 999.
4. To view the material loan and request limit entries for a specific patron classification, select the branch/patron code entry in the top portion of the table.

The material loan and request limit entries for the selected entry are displayed in the bottom portion of the table. The view lists the maximum item limits for each material type. Use the vertical scroll bar to see all the material type entries. Use the horizontal scroll bar to see the **Maximum Item Limit** and **Hold Limit** columns.

5. To modify the maximum number of items of a specific material type that can be checked out for a specific branch/patron code, follow these steps:
 - a) Select the branch/patron code entry in the top portion of the table.
 - b) Select the material type you want to modify in the bottom portion of the table, and click .

The Modify Material Loan Limits dialog box appears.



- c) Type the new setting in the **Maximum Item Limit** box, and click **OK**. The maximum is 3,000.

Note:

You can also set check-out limits on groups of material types for specific patron codes. See ["Defining Material Type Group Limits"](#) on page 348.

6. To modify the maximum number of items of a specific material type that can be requested for a specific branch/patron code, follow these steps:
 - a) Select the branch/patron code entry in the top portion of the table.
 - b) Select the material type you want to modify in the bottom portion of the table, and click .

The Modify Material Loan Limits dialog box appears.

- c) Type the new setting in the **Hold Limit** box, and click **OK**. The maximum is 3,000.

This setting applies only to hold requests, not ILL requests. The material request limits you set for each patron code/material type combination do not need to add up to the Total Holds limit. For more information about this setting, see ["Total Requests and Request By Material Type Limits"](#) on page 333.

Note:

A separate setting blocks hold requests from the PAC if the request would exceed the setting for the total number of requests allowed, or the number of requests allowed for a particular material type. See ["Set Holds options: Enabling, Item Status Restrictions, First Available Copy"](#) on page 291.

Items with valid barcodes and items without barcodes but with a status of On Order or In Process are included in the limit check.

7. Select **File, Save** to save any changes.

The status bar indicates that the record is saved.

Related Information

- **Limiting check-out by material type group** - You can set up groups of material types and limit the number of items belonging to the group that can be checked out to specific patron codes. See [“Defining Material Type Group Limits”](#) on page 348.
- **Blocks on long-overdue items** - You can set an additional circulation block in the staff client based on an item’s long-overdue status. Two parameters affect this block. The period after which an overdue item changes to “long overdue” is set with the Patron Services parameter **Overdues: # of days until long overdue**. Then, set the Patron Services parameter **Overdues: Block for long overdue items** to **Yes**. You can set these parameters at the system, library, or branch level.
- **Patron codes** - See [“Defining Patron Codes”](#) on page 23.
- **Material types** - See [“Defining Material Types”](#) on page 198.
- **Blocks on renewals from PAC or Polaris Phone Attendant** - See [“Defining Patron-Initiated Circulation Blocks”](#) on page 352.
- **Blocks on self-check circulation** - SIP self-check units use your settings in the Patron Loan and Request Limits table for maximum fines, items out, items overdue, and request limits. For other SIP self-check settings, see [“Setting Up SIP Self-Check”](#) on page 452. For Polaris ExpressCheck, see the *Polaris ExpressCheck Administration Guide*.
- **Blocks on using Wireless Access Manager (WAM)** - If your library uses the WAM application, you can prevent patrons with blocked accounts from using wireless access. Set the Patron Services parameter **WAM: Block if Patron has stops** to **Yes** at the system, library, or branch level. When you set this parameter at the branch level, it applies to patrons registered at that branch no matter where the blocked patron tries to use wireless access. That is, even if the blocked patron tries to use WAM at a branch that sets this parameter to **No**, the patron cannot use WAM at that branch. For more information about WAM, see the *Wireless Access Manager Administration Guide*, available on the Customer Extranet.

Calculating and Blocking for Estimated Accrued Fines

Polaris provides the ability to display an estimated fine amount (accrued fines) for overdue items a patron has currently checked out. You can opt to include claimed and/or lost items in the estimate calculation (system level only). The estimated fine amount information is available in the staff client, the PowerPAC and Mobile PAC patron account, and the Polaris ExpressCheck patron account.

In addition, you can choose to block the patron for a threshold amount that is the total of actual fines and accrued fines, not just fines already on the patron account, using the normal fines block functionality (see [“Fine Limits”](#) on page 332). If you choose to include accrued fines in blocking calculations, the accrued fines are added to any existing fines in real time and patrons are blocked as appropriate, using the normal fines block. The option to include accrued fines in blocking calculations is available at the system level only. This function applies to all check-out and renewals in Polaris, including staff client check-out and renewal, ExpressCheck check-out and renewal, renewal from PowerPAC or Mobile PAC, telephony renewal, and SIP check-out and renewal.

- **Governing library** - The calculation of the accrued amount is based on the setting of the governing library for fine calculation, set in the system-level Patron Services parameter **Consortium circulation**. (If that option is set to **Use transacting branch**, the calculation is based on the lending branch's settings.)

Note:

In some lost item scenarios it is possible to have a lost item where the replacement and overdue charges have not been charged. If the Transacting branch (the branch where the item is checked in) has been selected as the governing library for lost item recovery, that branch's charges would apply when and where the item is finally recovered, which cannot be known in advance. In this case the estimated amount will be based on the loaning branch's settings.

- **Hourly loans** - Accrued fines on hourly loans are calculated in real time and added to any actual fines at the time the block is calculated.
- **Maximum fine limit** - When the total amount is calculated and displayed, the displayed amount will not exceed the maximum fine limit per material type as defined in the Fines policy table, even if the calculated amount is greater. In other words, the patron will not be charged for an amount greater than the maximum fine limit.
- **Lost items with overdues** - You can opt to include items in the estimated fine calculation that are declared or billed lost but the overdue fine has not been charged. See [“Set up estimate accrued fine calculations and blocking”](#) on page 346.

- **Claimed items** - You can also opt to include claimed items in the estimated fine calculation. See [“Set up estimate accrued fine calculations and blocking”](#) on page 346.
- **Claimed and lost items in PAC patron account display** - The PAC patron account display does not include claimed or lost items, so the patron may be blocked for accrued fines that are not obvious in the display. However, many libraries have a lost item limit block and/or a claimed item limit block, and these may block the account before or in addition to the accrued fines block.
- **Notification and reporting** - The accrued amounts are not included on overdue notices, in the calculation for billing, or in calculations for collection agency reporting.

In summary, accrued fines are calculated for overdue items if the Patron Code/Fine Code Fine Amount definition is greater than \$0.00 and any one of the following conditions is true:

- The circulation status is Out and the item is overdue, but the overdue fine is not charged.
- You have opted to included claimed items in the calculation, the item circulation status is Claimed, and the system-level Patron Services parameter **Overdues: Charge fines for claimed items** is set to **Yes**. The table summarizes the effects of claimed items settings:

<i>Include claimed items in accrued fine calculation</i>	<i>Overdues: Charge fines for claimed items</i>	<i>Include in estimated amount calculation and block?</i>
Y	Y	Y
Y	N	N
N	Y	N
N	N	N

- You have opted to include lost items in the calculation, the item circulation status is Lost, and the overdue fine has not been charged. The table summarizes the effects of lost items settings:

<i>Include lost items in accrued fine calculation</i>	<i>Lost items charge options: Charge overdue</i>	<i>Include in estimated amount calculation and block?</i>
Y	Y	Y
Y	N	N
N	Y	N
N	N	N

Displaying Estimated Fines

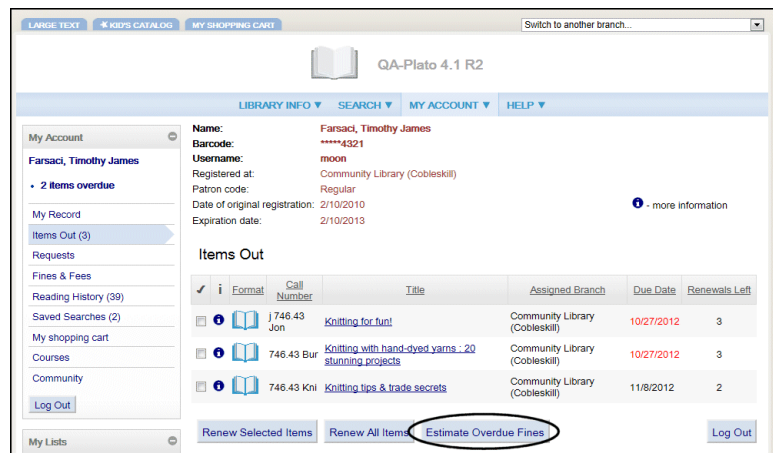
Estimated fines are available for display in both the staff client and PAC. (Including accrued fines in blocking calculations is optional and set at the system level.)

Staff Client Display

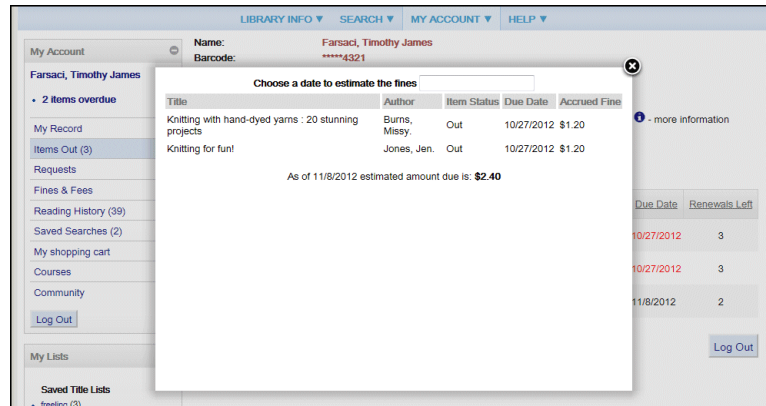
From the Patron Status workform - Items Out view, staff can estimate accrued fines on items that are currently overdue, calculating the fines if the items were returned today or on a date selected from a calendar. See [“Estimate fines on currently checked out items”](#) in the *Polaris Patron Services Guide 4.1R2*. If you choose to include lost and/or claimed items in the accrued fine calculation, similar functionality is available from the Patron Status workform - Claims view. See [“Estimate fines from the Patron Status workform - Claims view”](#) in the *Polaris Patron Services Guide 4.1R2*.

PAC Patron Account Display

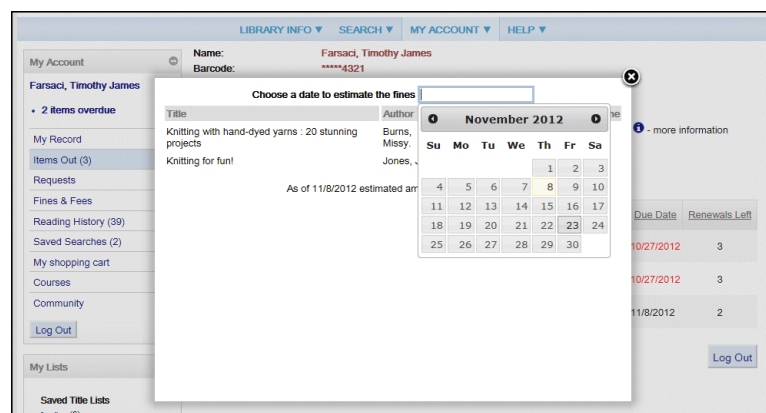
In PAC, the patron can estimate accrued fines from the Items Out page and from the Fines & Fees page of the patron account. In PowerPAC, the option to estimate overdue fines appears below the list if there are overdue items.



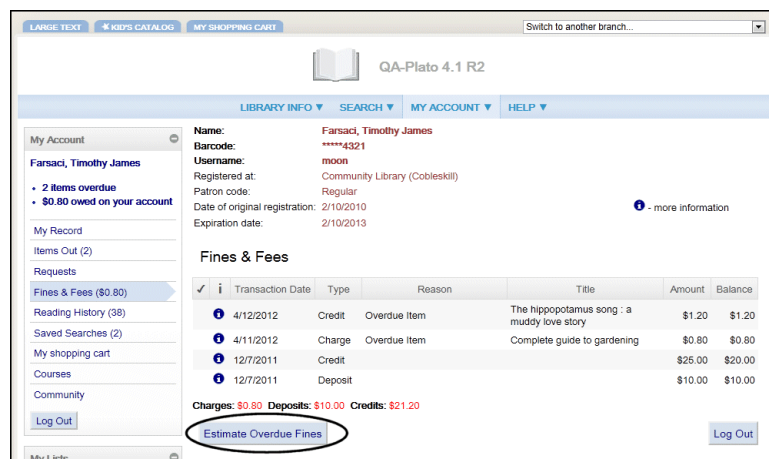
When the patron clicks **Estimate Overdue Fines**, a light box displays the title, author, item status, due date, and accrued fine for each overdue item, as well as the total due as of the current date. If you have opted to include claimed and/or lost items in the estimate, these are included in the display and calculation.



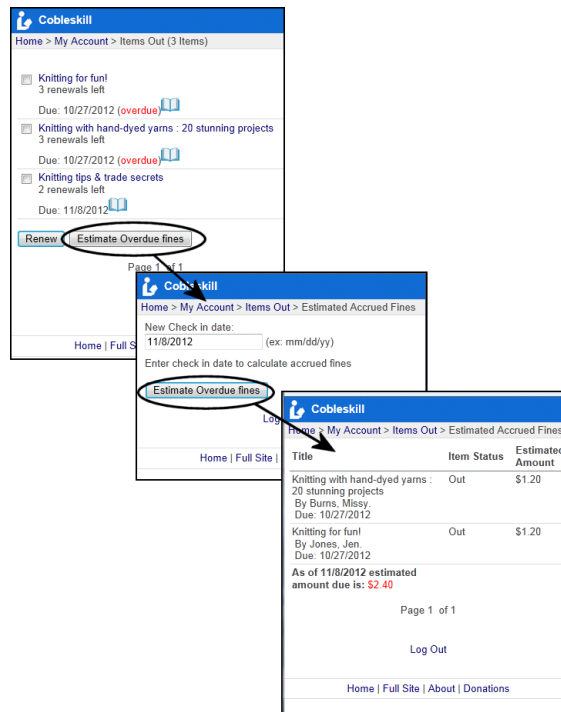
The patron can click the date field to select a different estimation date from a calendar.



The function is the same from the Fines & Fees page.



Mobile PAC offers similar features.



If you choose to include accrued fines in the patron blocking calculation, the patron fine block message appears when appropriate in PAC and the patron cannot renew items.

Note:

If the estimated amount includes lost item overdues or claimed items, the patron account is blocked but claimed and lost items are not displayed in the PAC patron account.

ExpressCheck Patron Account Display

ExpressCheck users can estimate fines using a dashboard control in the patron account. The patron sets the date and clicks **Calculate**.

The screenshot shows the 'Polaris ExpressCheck' system interface. At the top, there's a header with 'POLARIS LIBRARY SYSTEMS', 'Polaris ExpressCheck™ System', and a 'Help' button. Below this is a 'Patron Account' section. On the right, there's a 'My Account' section with a date selector set to '4/19/2013' and a 'Calculate' button. Below the date selector is a 'Print Summary' button and an 'Exit!' button. The main area displays patron information for Sarah Joseph, including her barcode, patron code, and registration details. At the bottom, there's a status message: 'Waiting for patron to place item on tray...'.

The accrued fines are displayed according to the selected date.

The screenshot shows the 'Polaris ExpressCheck System' window. At the top, it says 'Accrued Fines'. Below that, it displays 'Accrued Fines Total (Estimated Date: 4/19/2013) : \$566.10'. A table lists the items with their titles, authors, due dates, fines, and item statuses. An 'OK' button is at the bottom of the table area. The status bar at the bottom says 'Waiting for patron to place item on tray...' and '© 2004-2011 Polaris Library Systems'.

Title	Author	Due Date	Fine	Item Status
Heirloom : notes from an accidental tomato farmer	Stark, Tim.	4/15/2013 12:52:11 AM	\$540.60	Out
Heirloom : notes from an accidental tomato farmer	Stark, Tim.	4/14/2013	\$25.50	Out

Polaris Phone Attendant (Inbound Telephony)

You enable a selection to hear estimated fines at the top-level menu. (If the patron does not have any overdue or claimed items, the option is not available.) When the patron selects this option, the message includes the author, title, due date, and estimated amount for each item, and the total due. To enable this option, select (check) **Estimate Fines** in the Phone Attendant configuration utility. For details, see [“Set Phone Attendant options for specific lines”](#) in the *Polaris Telephony Administration Guide 4.1*.

The screenshot shows the 'Polaris - Phone Line Configuration - PhoneLineID 7' dialog box. It contains fields for Line Number, Organization ID, and Server ID. There are sections for Login Settings, Transaction Info, Menu Settings, and Path. In the Menu Settings section, the 'Estimate Fines Enabled' checkbox is checked and circled. Other options include 'List Items Out Enabled', 'List Overdue Items Enabled', 'List Hold Items Enabled', 'Account Statement Enabled', 'Include Author', 'Include Material Type', 'Include Branch', 'Renew Single Item Enabled', 'List Requests Enabled', 'Expiration Warning Enabled', and 'Expiration Warning Days'.

If the patron has lost or claimed items and overdue items, an additional message states **Additional charges are due for lost or claimed items, please contact the library for more information.** If the patron has only lost or claimed items but no overdue items, only the **Additional charges message** is played.

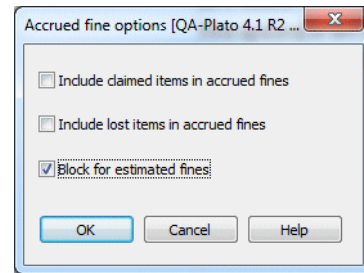
1-2-3

Set up estimate accrued fine calculations and blocking

Follow these steps to set whether to include lost and/or claimed items in accrued fine estimates, and whether to include accrued fines in blocking calculations.

1. In Polaris Administration (system level only), double-click the Patron Services parameter **Accrued fine options**.

The Accrued fine options dialog box opens.



2. If you want to include overdue fines for claimed items in the estimated fine calculation, select (check) **Include claimed items in accrued fines**.

If this option is checked, the claims list view in the Patron Status workform displays **Claimed/Accruing** for claimed items with accruing overdue fines.

Note:

If the system-level Patron Services parameter **Overdues: Charge fines for claimed items** is set to **No**, and the **Include claimed items** option for accrued fines is set to **Yes**, no overdue fines will accrue. The **Include claimed items** option setting has no impact in this case.

3. If you want to include overdue fines for lost items in the calculation, select (check) **Include lost items in accrued fines**.

If this option is checked, the claims list view in the Patron Status workform displays enhanced information for lost items with accruing overdue fines as follows:

Overdue is charged when the item is billed:

- Lost with unpaid replacement and unpaid overdue: **Lost/Unpaid**
- Lost with paid replacement and unpaid overdue: **Lost/Accruing**
- Lost with unpaid replacement and paid overdue: **Lost/Unpaid**

Overdue is charged when returned:

- Lost with unpaid replacement and accruing overdue: **Lost/Unpaid**
- Lost with paid replacement and accruing overdue: **Lost/Accruing**

Note:

If the branch-level Patron Services parameter **Lost items charge options: Charge overdue** when returned is set to **No**, and the **Include lost items** option for accrued fines is set to **Yes**, no overdues will accrue. The **Include lost items** option setting has no impact in this case.

If applied, the lost item charge options are applied according to the governing library for fines.

4. If you want to block patrons based on estimated fine amounts, select (check) **Block for estimated fines**.
5. Click **OK**.

Related Information

- **Claims settings** - [“Set up blocks for claims”](#) on page 331
- **Lost item settings** - [“Overdue Fines on Lost Items”](#) on page 243

Defining Material Type Group Limits

You can create groups of material types and place check-out limits on the group as a whole for specific patron codes. The group limit may be different from the individual limit on each material type that is part of the group. For example, a patron code may have individual limits of DVD = 5 and Blu-Ray discs = 2. A patron with that code may check out up to five DVDs and 2 Blu-Ray discs. (These individual limits are set in the Material Type Loan Limits policy table. See [“List and modify loan and request limit entries”](#) on page 336.) However, if both material types are assigned to a “Media” group with a group limit of 5, and the patron’s code is specified for the Media group, the patron will be blocked if he already has 4 DVDs and 1 Blu-Ray disc or a similar combination.

If the individual material type limits and group limit conflict, the patron is blocked according to the group limit. For example, a “Media” material type group consisting of Video Cassette and DVD may be set to 0 for a patron code “Child,” while the individual Video and DVD limits are set to 5 each. In this case, the patron code Child would be blocked at 0—that is, not allowed to check out Videos or DVDs. If the patron code Child is removed from the group, the patron code Child may have up to 5 each of both Videos and DVDs (total of 10 items) because the system then uses the individual material type limits.

Limits on material type groups affect check-out from the staff client, including bulk check-out for Outreach Services or Borrow by Mail, Polaris ExpressCheck, and check-out from third-party workstations via SIP or NCIP, where block messages appear at check-out. The group limit is also checked when offline circulation transactions are uploaded, and an appropriate message is written to the offline upload report. The message includes the group name.

At normal check-out in the staff client, if the patron would exceed the group limit for the patron code, a block message appears. The staff member must have the Circulation permission **Override item limit blocks: Allow** to override the block and continue the transaction.

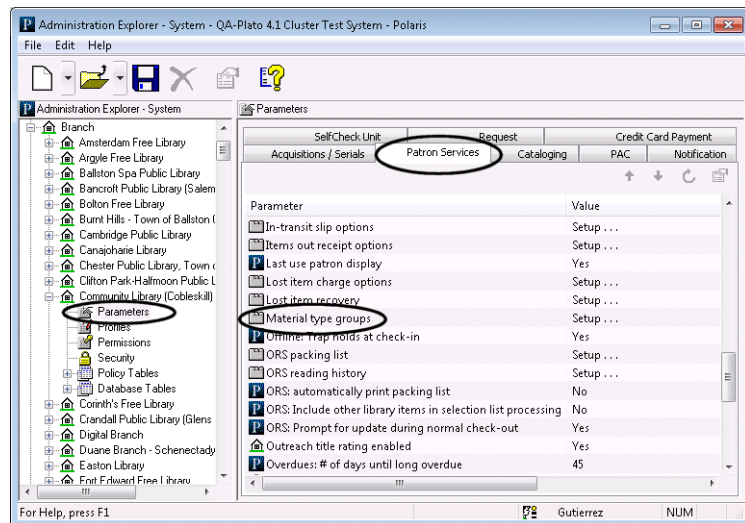
You can set up material type groups at the system, library, and branch levels. As with other loan limit blocks, the system uses the setting for the governing library for patron blocks, which may be the transacting branch or the patron’s registered branch (set in the system-level Patron Services parameter **Consortium circulation**).

1-2-3

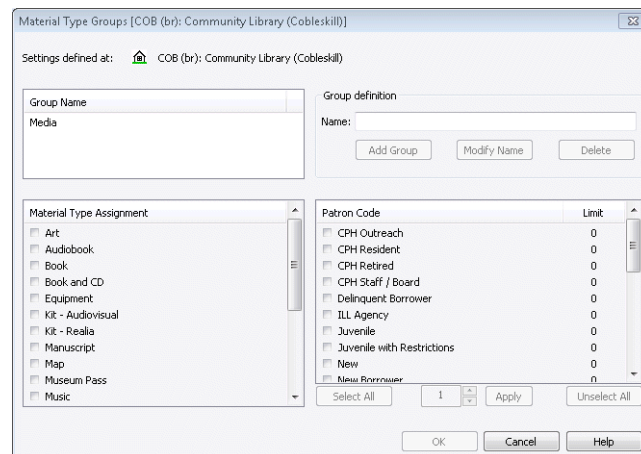
Set up check-out limits by material type groups

Follow these steps to set up material type groups and set check-out limits for specific patron codes.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **Material type groups**.



The Material Type Groups dialog box opens.



3. Define a material type group:
 - a) Type a name for the group in the **Group definition** box.
 - b) Click **Add Group**.

The new group appears in the Group name list at the top left portion of the dialog box.

Material Type Groups [COB (br): Community Library (Cobleskill)]

Settings defined at: COB (br): Community Library (Cobleskill)

Group Name: **Media**

Group definition: Name: Media

Buttons: Add Group, Modify Name, Delete

Material Type Assignment:

- ☐ Art
- ☐ Audiobook
- ☐ Book
- ☐ Book and CD
- ☐ Childrens Video
- ☐ Equipment
- ☐ Kit - Audiovisual
- ☐ Kit - Reala
- ☐ Manuscript
- ☐ Map
- ☐ Museum Pass

Patron Code Limit

☐ CPH Outreach	0
☐ CPH Resident	0
☐ CPH Retired	0
☐ CPH Staff / Board	0
☐ Delinquent Borrower	0
☐ ILL Agency	0
☐ Juvenile	0
☐ Juvenile with Restrictions	0
☐ New	0
☐ New Borrower	0

Buttons: Select All, 1, Apply, Unselect All

Buttons: OK, Cancel, Help

4. Assign material types to the group:

- Select the new group name in the Group Name list.
- In the Material Type Assignment list, check the material types that should be included in the group.

Because a material type can belong to only one group, the list displays the material types not already assigned to another group for this organization.

Note:

You cannot add all material types to a group.

5. Assign patron codes and patron code limits to the group:

- Select the group in the Group Name list.
- In the Patron Code list, check the patron codes that should have a limit for this group. If several patron codes should have the same limit, select the appropriate codes. If all patron codes should have the same limit, click **Select All**.
- In the number control, specify the number of items allowed for the selected patron codes, and click **Apply**.

Material Type Groups [COB (br): Community Library (Cobleskill)]

Settings defined at: COB (br): Community Library (Cobleskill)

Group Name: Media

Group definition: Name: Media

Buttons: Add Group, Modify Name, Delete

Material Type Assignment:

- ☐ Music
- ☐ New / Popular Book
- ☐ Periodical
- ☐ Picture / Photo
- ☐ Reala
- ☐ Rental
- ☐ Score
- ☐ Software
- ☐ Test Material Type 1
- ☐ Vertical File Material
- ☒ Video

Patron Code Limit

☐ CPH Outreach	0
☐ CPH Resident	0
☐ CPH Retired	0
☐ CPH Staff / Board	0
☐ Delinquent Borrower	0
☐ ILL Agency	0
☒ Juvenile	1
☒ Juvenile with Restrictions	0
☐ New	0
☐ New Borrower	0

Buttons: Select All, 1, Apply, Unselect All

Buttons: OK, Cancel, Help

- d) Repeat steps a and b to set different limits for different patron codes.
6. Click **OK** to save your group settings.

Related Information

- **Modify a material type group** - In the Material Type Groups dialog box, select the group in the Group Names list. You can then change the item material type and patron code selections, and set new limits. To modify the group name, select the group in the Group Names list. The name appears in the **Name** box. Edit the name and click **Modify Name**.
- **Delete a material type group** - Select the group in the Group Names list. The name appears in the **Name** box. Click **Delete**. When you delete a material type group, the limits set for individual material types are applied at check-out.
- **Patron codes** - See [“Defining Patron Codes”](#) on page 23.
- **Material types** - See [“Defining Material Types”](#) on page 198.
- **Governing library for patron blocks** - The governing library for patron blocks determines which branch’s material limit settings are used. See [“Governing Library for Circulation Transactions”](#) on page 209.

Defining Patron-Initiated Circulation Blocks

If your library allows patrons to renew items from the PAC, by telephone, or from SIP self-check units, or you provide integrated ebook circulation from PAC, you can set blocking conditions on these actions that are different from those that apply to renewals from the staff client. (Ebook circulation is not supported in the staff client.) The PAC displays appropriate messages related to the blocks that you set.

Example:

You allow PAC renewals on overdue items. There is a fine associated with an overdue item, but the fine does not cause the total charges on the patron's account to exceed a block threshold. When the patron attempts to renew the item, the PAC displays a message that the patron's account will be charged at renewal and requests confirmation to proceed with the renewal. If the patron chooses to proceed, the patron's account is charged the fine for the overdue item. If the patron cancels, the item is not renewed, and the account is charged when the item is returned.

You set these blocks with the Patron Services profile **Patron initiated circulation: Blocking conditions**. You can set the profile at the system, library, or branch level. Patrons are blocked according to the settings for the patron's registered branch. Items are blocked according to the settings for the item's assigned branch.

Note:

In addition to the blocking conditions you set for patron-initiated renewals and ebook circulation, PAC renewals are blocked when an item can fill an Active or Pending hold request, when the number of renewals (including the current renewal) would be greater than the renewal limit set in the item record, and if PowerPAC profile **Patron Access: Renewal** is set to block renewals if the due date would fall after the patron's registration has expired.

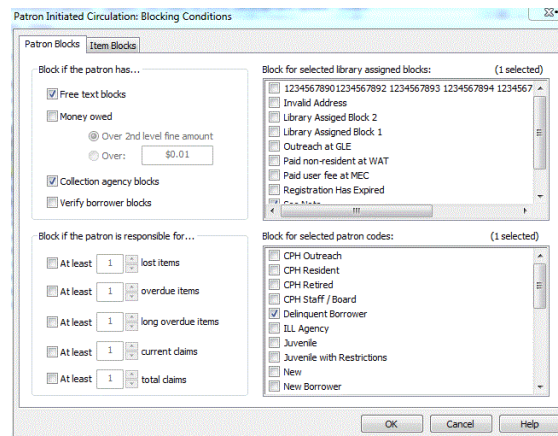
1-2-3

Set blocks on patron-initiated circulation and ebook circulation

Follow these steps to set patron and item blocks on renewals from PAC, by telephone, or from SIP self-check units.

1. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Patron Services** tab in the details view.
2. Double-click **Patron initiated circulation: Blocking conditions**.

The Patron Initiated Circulation Blocking Conditions dialog box opens.



3. Click the **Patron Blocks** tab, and select from the following options related to the patron record:
 - **Free text blocks** - Blocks patrons whose records contain free-text blocks.
 - **Money owed** - Blocks patrons whose total charges are greater than a specified amount. If you select **Money owed**, select either **Over 2nd level fine amount**, or select **Over** and type an amount.

Note:

The second level fine amount depends on the setting for the governing library for patron blocks. By default, the system uses the setting of the patron's registered branch. For information about setting the governing library, see ["Set the governing library for circ transactions"](#) on page 210. For information about setting the second level fine amount, see ["List and modify loan and request limit entries"](#) on page 336.

- **Collection agency blocks** - Blocks patrons whose accounts are in collection.
- **Verify borrower blocks** - Blocks patrons whose records require staff to verify the patron's identity.
- **At least.... lost items** - Blocks patrons who have one or more lost items. If you select this option, set the number of lost items that activates the block.

- **At least.... overdue items** - Blocks patrons who have one or more overdue items. If you select this option, set the number of overdue items that activates the block. All renewals and ebook circulations by the patron are blocked if the patron has the specified number of overdue items, even if other items are not overdue.
- **At least.... long overdue items** - Blocks patrons who have one or more long overdue items. If you select this option, set the number of long overdue items that activates the block. All renewals and ebook circulations by the patron are blocked if the patron has the specified number of long overdue items, even if other items are not overdue.

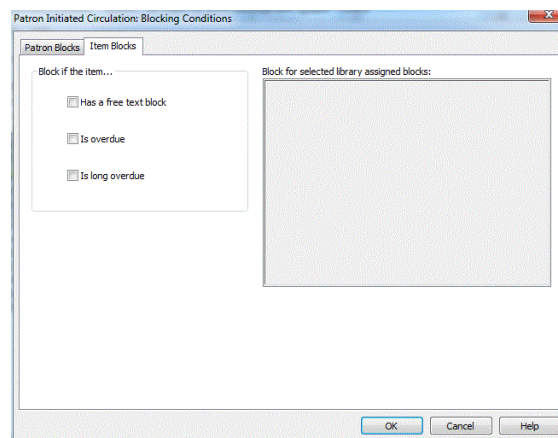
Note:

The period after which an overdue item changes to "long overdue" is set with the Patron Services parameter **Overdues: # of days until long overdue**. You can set the parameter at the system, library, or branch level.

- **At least.... current claims** - Blocks patrons who have one or more current claims that they have returned or never had items that are still shown as checked out. If you select this option, set the number of current claims that activates the block.
- **At least.... total claims** - Block patrons who have one or more total claims that they have returned or never had items that are still shown as checked out, regardless of whether or how the claims have been resolved. If you select this option, set the number of total claims that activates the block.
- **Library-assigned blocks** - Select any library-assigned blocks that, when they appear in the patron record, should block PAC and telephone renewals and ebook circulation.
- **Patron code blocks** - Select patron codes that should be blocked from making PAC and telephone renewals or checking out ebooks.

4. Click the **Item Blocks** tab.

The Item Blocks tabbed page displays options that block renewals and ebook circulation according to conditions related to the item record.



5. Set the item record conditions that should block renewals:
 - **Has a free text block** - Blocks renewals or (ebook circulation) on any item with a free-text block.
 - **Is overdue** - Blocks renewal on any overdue item.
 - **Is long overdue** - Blocks renewal on any long-overdue items.

Note:

The period after which an overdue item changes to “long overdue” is set with the Patron Services parameter **Overdues: # of days until long overdue**. You can set the parameter at the system, library, or branch level.

- **Library-assigned blocks** - Select any library-assigned blocks for the item’s assigned branch that should block PAC and telephone renewals and ebook circulation when they appear in the item record.

6. Click **OK** in the dialog box.

The Administration Explorer appears.

7. Select **File, Save** to save any changes.

The status bar indicates that the record is saved.

Related Information

- **Patron blocks** - Library-assigned blocks available for patron records are defined in the Patron Blocks policy table. See [“Defining Patron Block Descriptions”](#) on page 328.
- **Item blocks** - Library-assigned blocks available for item records are defined in the Item Block Descriptions database table. See [“Defining Item Blocks”](#) on page 325.
- **Loan limit blocks, including fine limits** - Loan, fine, and request limits are set in the Patron/Material Type Loan Limit Blocks policy table. See [“Defining Loan and Request Limit Blocks”](#) on page 332.
- **Other blocks on self-check circulation** - For SIP self-check equipment, see [“Setting Up SIP Self-Check”](#) on page 452. For Polaris ExpressCheck, see the *Polaris ExpressCheck Administration Guide*.

Associated Patron Blocking

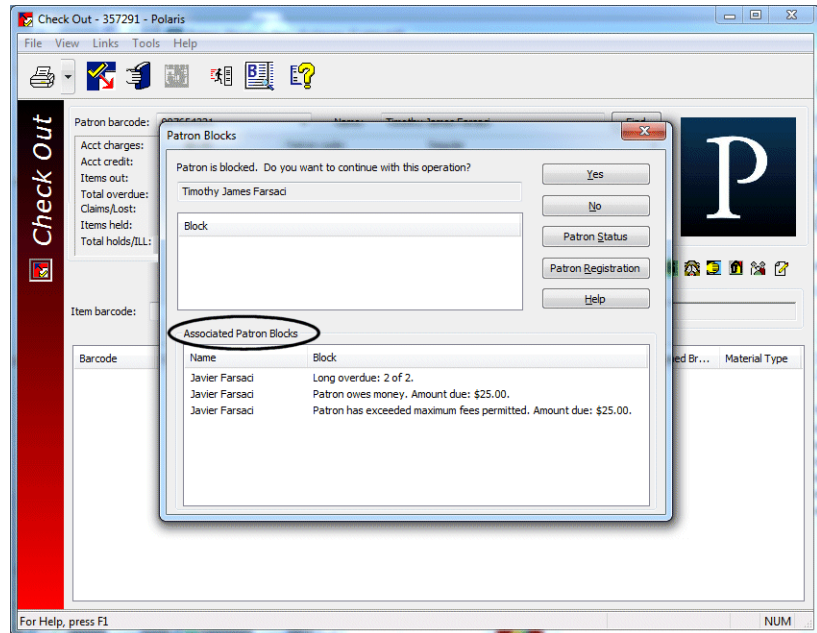
A staff member can choose to block a parent or primary record at checkout and renewal when an associated secondary or child record is blocked at checkout. (Staff members can also associate patrons for convenience, with no blocking relationships.)

- One primary record may be linked to multiple secondary records. If any of the secondary records is blocked, the primary record is blocked.
- One secondary record may be linked to multiple primary records. If the secondary record is blocked, all the linked primary records are blocked.
- Two primary records may be linked to each other. If either is blocked, the other is blocked.
- Block checking is only one level deep. For example, primary A and primary C are linked to secondary B. If B is blocked A and C will be blocked, because they each are one link away from B. But A will not be blocked if C is blocked.

Associated patrons can be from any branch, not necessarily from the same registered branch. However, in Polaris Administration you can limit the number of records that can be linked in a blocking relationship, since large numbers may affect system performance during checkout.

Staff Client Check-Out and Renewal Processing

Associated patron blocking applies to check out from the Check Out workform, renewal from the Check Out workform, and renewal from the Patron Status workform - Items Out view. If associated patron blocking has been enabled and at least one patron record associated with the transacting patron is blocked, a dialog box is displayed showing the linked patrons and the type of block. The same conditions that would block the associated record directly during checkout will block the primary patron record checkout. The block dialog box lists each block on a separate line. Each entry in the Associated Patrons list is a link to the associated patron's record.



If one or more associated patrons are blocked for any reason that requires an override, both the permission to override the specific block and the permission **Override associated patron block: Allow** are required to continue check out. Transaction 9001 logs supervisor overrides for the **Override associated patron block** permission override

Adding and Editing Associations

Staff members use the Patron Status workform - Associations view to add or remove associations. When the staff member adds an association to a patron record, the Add Association dialog box includes the option **Block me if these patron records are blocked**. The open patron record is the primary record. When **Block me** is checked, it will be blocked when the newly associated record is blocked. The Patron Status workform - Associations view displays the list of associated patrons. A column indicates a blocking relationship. The Patron Status workform also offers a Tools menu option, **Check Associated Patron Blocks**. Staff can select this option to display a list of the blocks on the associated patrons' records.

- **Merging Patron Records** - The "winning" patron record retains any associated patron links it already has, but the winning record is not affected by any links in the losing record.
- **Deleting Patron Records** - When a patron record with associations is deleted, the link is removed from the associated records. A warning message displays with a breakable link, but there is no additional message if the linked patrons are blocked.

Offline Checkout

If a blocked associated patron is detected when offline check-out transactions are uploaded, a message is written to the upload log file. The message includes the associated patron name and barcode, and the block text. If the patron is blocked for more than one reason, each block is listed; if more than one patron is blocked, each is listed in a separate message.

PAC and Polaris ExpressCheck Check-Out and Renewals

From PAC, the primary (parent) record is stopped from renewal if an associated patron record has exceeded the 2nd level fine amount as determined by the governing library for patron blocks, or if the associated patron record has exceeded the maximum overdue item limit as determined by the governing library for patron blocks.

In Polaris ExpressCheck, the primary (parent) record is also stopped from checking out and renewal if an associated patron record has exceeded the 2nd level fine amount as determined by the governing library for patron blocks, or if the associated patron record has exceeded the maximum overdue item limit as determined by the governing library for patron blocks. A message is displayed, which can be edited in Polaris Language Editor (WebAdmin).

- **Default header text** - Polaris ExpressCheck - Associated Patron Blocks
String ID EC_TEXT_COURTESY_ASSOCIATED_ACCTBLOCKED_TITLE
- **Default message text** - One or more records linked to your library registration is blocked. Click Show Details to see more information.
String ID EC_TEXT_COURTESY_ASSOCIATED_ACCTBLOCKED_MSG

SIP Self-Check

A setting in the SelfCheck Unit parameter **Patron blocks** controls whether a patron is blocked at checkout when an associated patron has exceeded the 2nd level fine amount, or has exceeded the maximum overdue item limit as determined by the governing library for patron blocks. The parameter is available at the system, library, or branch level, and is set to **No** (do not block) by default. The system uses the setting of the workstation's branch. See "[Set SIP self-check parameters](#)" on page 456.

1-2-3

Set associated patron limit and blocking default

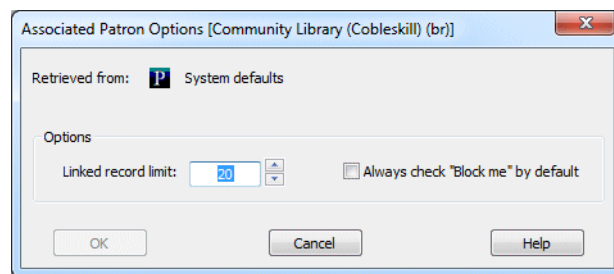
Follow these steps to set a limit on the number of records that can be associated with one patron record, and set the default value for associated patron blocking.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tab in the details view.

The parameter is available at the system, library, or branch level. The system uses the setting for the patron's registered branch.

2. Double-click **Associated patron options**.

The Associated Patrons Options dialog box opens.



3. Set the linked record limit, which is the number of records that can be associated with one patron record.

Valid values are 0-999; the default setting is 20. Very high limits may affect system performance at checkout.

4. Set the **Block me** default value.

The default is unchecked (do not block). When a staff member creates a new association between two patron records, he or she checks the **Block me** option to set up a blocking relationship between the associated records, or unchecks the option to create an association without blocking.

5. Click **OK**.

Related Information

Associated Patron Groups Report - The toolbar report Associated Patron Groups lists all patron records that are linked in associations (whether or not these are blocking relationships). In the Polaris Reports Manager, select **Public Services, Patron Services** to access the report. For details, see [“Using Polaris Standard Reports”](#) in the *Polaris Basics Guide 4.1R2*.

Setting Up Floating Collections



Floating collections processing is the ability to allow certain items to remain at the branch where they were last checked in. If an item is called to another branch, for example to fill a hold request, the item will stay at that branch when it is returned. The items move among branches as they are used, not according to a rotation schedule. Floating collections allow high-demand items to remain at high-traffic organizations, and collection contents to change with demand. They also reduce the cost of returning materials to a single starting point after each use at another branch. You can check in an item at branch B that belongs to branch A and, rather than putting the item in transit back to A, let it remain at B. The item's Assigned Branch changes from branch A to branch B, and the reassigned item takes on branch B's circulation parameters.

Floating collection functions are optional. If your system consists of organizations that do their own purchasing and processing, and item ownership is important to each organization, you may not want to implement floating collections. If your system does central purchasing and processing, then distributes items to branch organizations, you may find floating collections very useful.

Some libraries allow nearly all items to float. Others exert more control over what items may float and to what locations. You can configure floating options at the branch level, so that each "home" branch can determine if any of its items are allowed to float and to which branches. You can also decide that not all materials from all collections should float; some material types should always return to their original home branch. See ["Floating Collections: Setup Examples"](#) on page 377.

In addition to these limits, individual items can be designated as exempt from floating. The item record includes a **Do not float** option that can be set manually for an individual item, through an item template, or by bulk change to an item record set. ILL items and reserve items with a reserve status of On Reserve or Permanent Reserve never float.

See the following topics:

- ["Floating Collections Processing Overview"](#) on page 361
- ["Designating Floating Collections"](#) on page 366
- ["Setting Home and Receiving Branch Policies"](#) on page 369
- ["Setting Branch Parameters"](#) on page 374
- ["Floating Collections: Setup Examples"](#) on page 377
- ["Floating Collections: Troubleshooting"](#) on page 379
- ["Floating Collections Reports"](#) on page 380

Floating Collections Processing Overview

When you set up floating collections, you first determine what collections are eligible to float for which home branches. The home branch's policies determine if an item from the eligible collection should float. For each branch that enables floating collections, you set the following additional limits:

- Which branches can receive the home branch's floating items
- Which material types may not float regardless of whether the item belongs to an eligible collection.
- For each eligible material type, how many items attached to the same bibliographic record will be accepted at the receiving branch.

If floating is enabled for an item's home branch, when the item is checked in at a receiving branch, the system checks the collection, material type and receiving limit of items by material type. If all conditions permit floating, the item is checked in at the new branch and the item's assigned branch automatically changes to the new branch. If the item does not match the floating conditions, the system puts it in-transit back to its last assigned branch.

Note:

If floating collections are not used, the item's home branch and assigned branch are typically the same. The home branch value is used only for floating collections and does not affect any other item processing.

Cooperative Considerations for Floating Collections

Libraries and branches that participate in floating collections may want to have matching, reciprocal policies to help maintain a balance of items. If Branch A allows items to float to Branch B, B may want to put A on its floating list. If the participating organizations will float many items, you should also consider shelf integration. If two libraries do not use the same classification system, integrating floating items with the library's "home" holdings would be nearly impossible. But it may also be problematic even if they use the same classification system. For example, if two identical items are given radically different call numbers, they will be shelved in different places.

Participating organizations may also want to consider using the same Polaris collections (all the organizations are assigned to a collection eligible to float). However, if the Patron Services parameter **Floating: Float items with no matching collection** is set to **Yes**, it is possible to receive a floating item where the receiving branch has no matching collection. Also, if you want

items with no assigned collection to float, set the Patron Services parameter **Floating: Float items with blank Assigned Collection** to **Yes**. These two parameters in combination have the following effects, and participating organizations without matching collections should decide which, if any, of these results are acceptable:

- **Floating: Float items with no matching collection = Yes**
Floating: Items with blank Assigned Collection can float = No
Result - An item may float to a new branch even if the receiving branch has no matching collection. The Assigned Branch will change to the receiving branch, and the Assigned Collection will change to null (blank). The item will not float again.
- **Floating: Float items with no matching collection = No**
Floating: Items with blank Assigned Collection can float = Yes
Result - Any item with no Assigned Collection will float normally.
- **Floating: Float items with no matching collection = Yes**
Floating: Items with blank Assigned Collection can float = Yes
Result - Any item with no Assigned Collection will float. As mismatched items float to a new branch, the number of items with no Assigned Collection will increase.
- **Floating: Float items with no matching collection = No**
Floating: Items with blank Assigned Collection can float = No
Result - These are the default settings. Items with no Assigned Collection do not float. Only items with matching collections will float. Because mismatched items do not float, none will be reassigned a null Assigned Collection value.

Finally, both home branches and receiving branches must set the Patron Services parameter **Floating enabled** to **Yes**. If this parameter is set to **No** for a branch, items will not float to the branch even if the home branch has selected the branch as a receiving branch. A home branch must also set this parameter to **Yes**; otherwise, no items will float even if the appropriate collections are designated as floating for the branch.

Circulation Processing for Floating Items

Floating collection processing takes place at check in. The system check for floating eligibility and the migration of the item to its new assigned branch are nearly the last steps in the check-in process. The process happens automatically; no message is displayed to the staff member when the item floats to its new assigned branch.

- **Fines** - All fines are calculated before floating, according to the most recent assigned branch for the item.
- **Holds** - All holds are filled before the floating check. The hold is filled according to the policies of the most recent assigned branch. If the item fills a hold, it does not float to the new branch; it goes to the pick-up branch.

- **Blocks** - Checked according to the most recent assigned branch, before the floating check.
- **Cancelling check in** - The option to cancel a check in occurs before the check for floating. Cancelling check-in retains the original Assigned Branch of the item.
- **Lost or Lost-and-Paid items** - Lost recovery options, including the lost recovery dialog, are invoked according to the rules of the receiving branch, regardless of whether the item floats to that branch or not.
- **Claimed items** - Floating has no impact. The patron record is updated normally when the item checks in, regardless of floating.
- **Prompt for In-transit** - If an item qualifies for floating but does not migrate to the receiving branch (for example, the item is over the material type limit for the receiving branch), you can have the system display a prompt to accept an item over the limit anyway (see [“Set parameters and profiles for floating collections”](#) on page 374). If you suppress the prompt from display, an in-transit prompt is displayed instead, and the staff member can put the item in-transit or check it in (the assigned branch and other parameters do not change to those of the receiving branch).

If the item does not qualify for floating, the system displays or does not display the in-transit prompt according to the Polaris Administration setting for the receiving branch. If the prompt displays and the option to put the item in-transit is not selected, the item is checked in at the receiving branch but the assigned branch and other parameters do not change to those of the receiving branch.
- **Shelving Status** - The assignment of a shelving status occurs after the item becomes In at the receiving branch. The behavior is not affected by floating.
- **In-to-In** - If the assigned branch is the same as the check-in branch, the item goes from In to In. If an item status is In and the Assigned Branch is different from the receiving branch, the transaction is treated as a new check-in.
- **Bulk check in** - If an item successfully floats, the item becomes In at the new assigned branch. No additional messages display.
- **Check in from item record** - Same processing as normal check in from the Check In workform.
- **OTF (on-the fly) items** - These behave as normal items. They may float as long as they fit the rules established for floating.
- **Items that do not float** - ILL items and reserve items with a reserve status of On Reserve or Permanent Reserve never float.

- **Offline check in** - Floating checks are performed as part of the offline upload. There are no additional messages in the upload log resulting from floating. If an item that would check in at the receiving branch (per the floating item option of the Home Branch) is checked in offline, the Assigned Branch field in the item record will be updated when the transactions are uploaded. No message is written to the upload transaction file. If an item that would be placed in-transit from the receiving branch is checked in offline, the item status is set to In-Transit, and a message is written to the offline upload transaction file.
- **SIP check in** - If an item that would check in at the receiving branch (per the floating item option of the Home Branch) is checked in at a SIP workstation, the item floats to the receiving branch like the normal check-in. The Assigned Branch field in the item record is updated accordingly.
- **Transactions** - For check in, the subtype **Item float branchID** shows the branch ID of the receiving branch if an item has floated there. Check-out and check-in transactions include the item's home branch.
- **Possible problems**
 - If the assigned branch of a floating item is changed manually or by bulk change to a branch that is not on the home branch's list of receiving branches, the item will obey the circulation parameters of its new assigned branch, unless it is checked in at a branch controlled by the home branch.
 - If the floating option is disabled for the home branch, items will stay at their last assigned branch. Reporting is available to identify items where the Home branch and Assigned branch differ. See ["Floating Collections Reports"](#) on page 380.
 - If you choose to allow serial items to float, the PAC compressed holdings statement may be inaccurate. You can minimize the difficulty by restricting a serials collection or material type from floating, or by creating serial item records with a template in which **Do Not Float** is checked.

Collection Agency Processing and Floating Items

If several branches report to a collection agency and the reporting is set by item's branch, remember that floating items can change branch. For example, if a patron account is submitted to a collection agency for a charge on Item X from Branch A and then that item floats to Branch C, in subsequent reporting, the patron's account will be reported from Branch C. The patron will not have multiple charges, but the amount owed for that item is now associated with C. The patron's account is no longer listed on the Update Report for Branch A; it appears on the next Submission Report for Branch C. Subsequent payments and other activity will appear for Branch C unless the item moves again.

Item Record Updates for Floating Items

When a floating item is checked in at the receiving branch, the item record fields are updated as follows:

- **Assigned branch** - Changes to the branch of the check-in workstation.
- **Collection** - If both the home branch and receiving branch are assigned to the collection, that collection is displayed. If the receiving branch is not assigned to the collection, or if there is no collection indicated in the item record, the behavior depends on Polaris Administration settings. See [“Cooperative Considerations for Floating Collections”](#) on page 361.
- **Loan Period** - The Loan Period defined for the loan period code of the receiving branch.
- **Fine Code** - The Fine Code defined for the receiving branch.

Note:

Loan Period Codes and Fine Codes can be defined at the system level so that all participating branches share these settings. Also, you can use the Patron Services Parameter **Fine and Loan period defaults** to set default values to apply when the loan period code and fine code are not shared by the home branch and receiving branch.

- **Shelf Location** - The program attempts a character-for-character match on the field. If the fields match, the value remains. If the fields do not match, the value is set to **None**.
- **Stat code** - The program attempts a character-for-character match on the field. If the fields match, the value remains. If the fields do not match, the value is set to **None**.
- **Library-assigned blocks** - The program attempts a character-for-character match on the field. If the fields match, the value remains. If the fields do not match, the value is set to **None**.
- **Free text block** - The text is not altered or deleted. It appears in the item record after check in.

The Item Record workform - Circulation History view shows the item's Home branch, the **Do not float** option, and the circulation history of the item as the item moves from branch to branch. (You can also see the circulation history for floating items linked to the same bibliographic record by selecting **Tools, Show Usage Statistics** in the Bibliographic Record workform.) Two transactions appear each time an item floats, one for the check in, and one for the change in assigned branch due to floating.

Designating Floating Collections

Polaris collection records name collections, track which branches use the collections, and designate what collections are potentially eligible to float from which branches. Consider setting up these collections so that all branches that participate in the floating arrangement use the collections; otherwise, you will need to set parameters to deal with the case where an item floats to a receiving branch that does not share the item's collection (see [“Set parameters and profiles for floating collections”](#) on page 374).

1-2-3

Designate collections as eligible to float

Follow these steps to specify what collections are potentially eligible to float from which branches.

Note:

For general information about setting up and editing collections, see [“Working with Collections”](#) in the *Polaris Administration Guide 4.1R2*.

1. From the Polaris Shortcut bar, select **Administration, Explorer, System**.

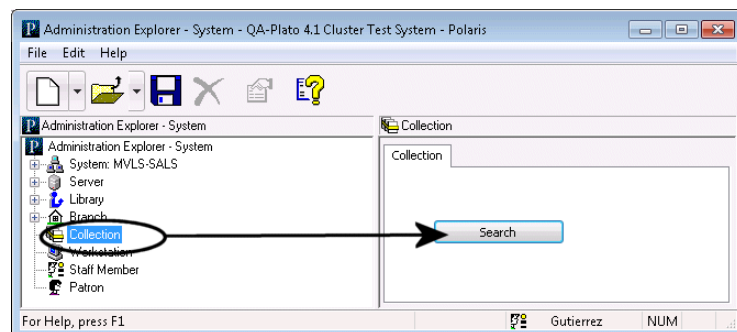
The Administration Explorer opens.

2. Click **Collection** in the Administration Explorer tree view.

A search button appears in the details view of the Explorer.

Tip:

To work with a specific collection, you can use the Polaris Find Tool to search for and open the collection record. Select **Administration, Collection** on the Polaris Shortcut Bar. To work with multiple collections, use the Administration Explorer.



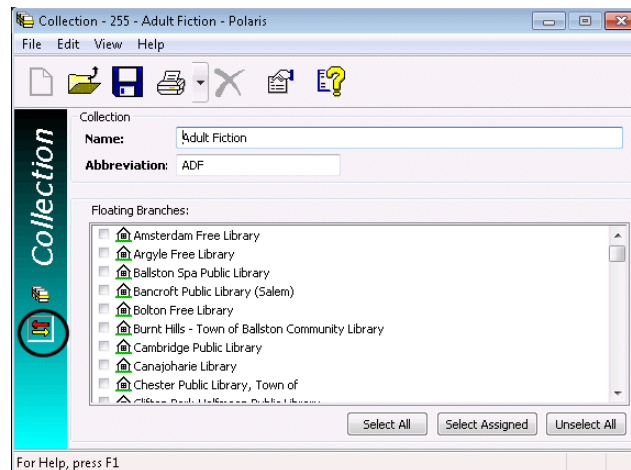
3. Click **Search** to display the Polaris Find Tool.
4. Search for the collections with which you wish to work.
5. Select collections from the Find Tool results list to list in the Administration Explorer. You can use the **CTRL** or **SHIFT** key to select multiple collections.
6. Right-click in the results list, and choose **Select** from the context menu. The collections are listed in the Explorer.

7. Right-click the collection in the Administration Explorer, and select **Edit** from the context menu.

The Collection workflow opens.

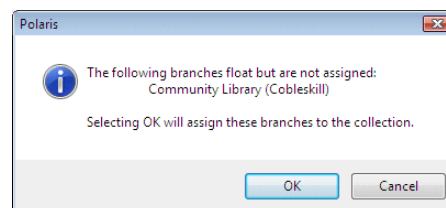
8. Select **View, Floating branches** or click .

The Collection workflow - Floating branches view opens. The workflow lists all the branches in the system.



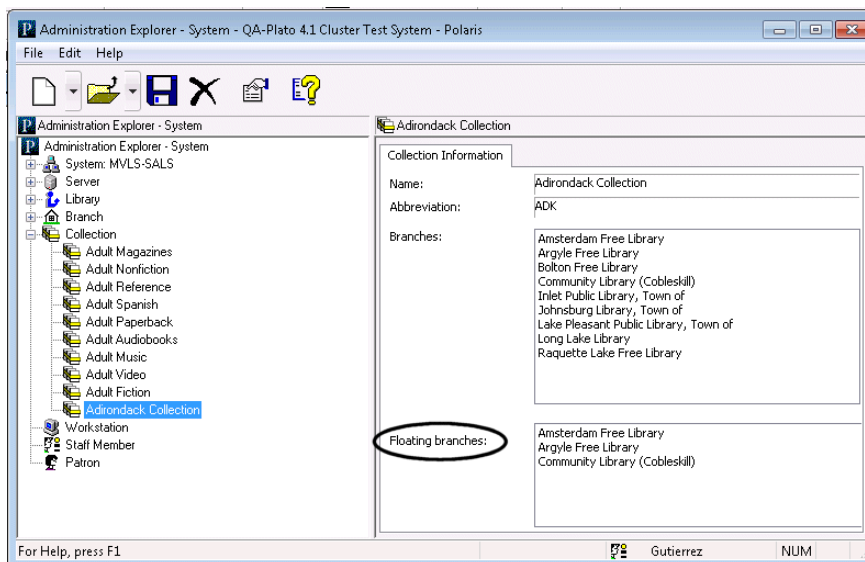
9. Select the potential home branches for this collection (those that may allow items from this collection to float), using one of these methods:
 - Click **Select All** to select all the listed branches.
 - Click **Select Assigned** to select all the branches that have been assigned to this collection. This option makes the floating branches selections the same as the assigned branches selections.
 - Select the check boxes by individual branches.
10. Select **File, Save** to save your changes.

If you have selected a branch to which the collection has not been assigned, a message asks if you want to assign the branch to the collection or cancel your work.



11. Click **OK** to assign the branch to the collection and continue to save your work.

When floating branches have been assigned, the Collection property sheet in Polaris Administration shows what branches have been assigned for floating.



12. Set policies for the individual home branches that will allow collections to float. See [“Setting Home and Receiving Branch Policies”](#) on page 369.
13. Set individual branch parameters for floating collections. See [“Setting Branch Parameters”](#) on page 374.

Setting Home and Receiving Branch Policies

Three policy tables control floating item policies:

- **Floating: To Branch** - This table sets the possible receiving branches for items that are allowed to float. The Home branch designated in the item record determines the branches to which its items may float. See [“Set the branches to receive floating items”](#) on page 370.
- **Floating: Material Types** - Use this table to set the material types that should not float, even if the items belong to a floating collection. The Home branch designated in the item record determines the material types that should not float. See [“Set the material types that cannot float”](#) on page 371.
- **Floating: Material Type Limits** - A busy branch that receives many floating items may be at risk of being overwhelmed by popular items, running short of shelf space, or of absorbing the bulk of available items. Use this table to set how many items linked to the same bibliographic record the receiving branch is willing to accept. The receiving branch determines separate limits for In items attached to the same title and items of any circulation status attached to the same title. [“Limit the floating items for the same title a branch can receive”](#) on page 372.

1-2-3

Set the branches to receive floating items

The home branch decides which branches may receive its floating items. Follow these steps to set the receiving branches.

Note:

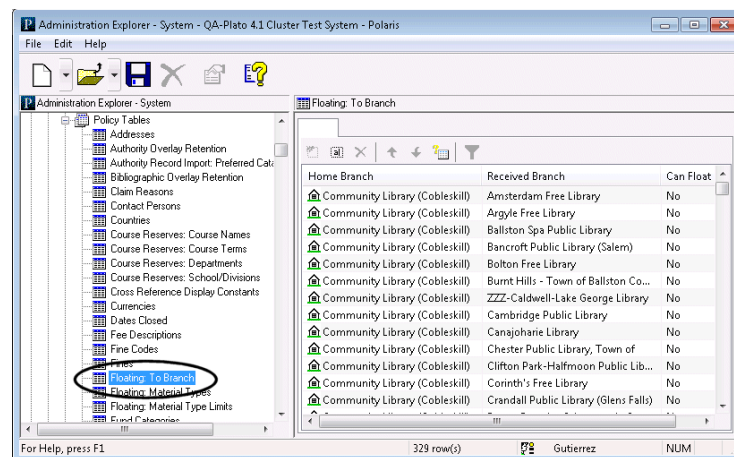
You need the system-level System Administration permission **Modify floating to branch table: Allow** to do this procedure.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the home branch, and select **Floating: To Branch**.

Note:

To better manage memory, a program-defined row limit determines whether this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

The Floating: To Branch table is displayed in the details view.

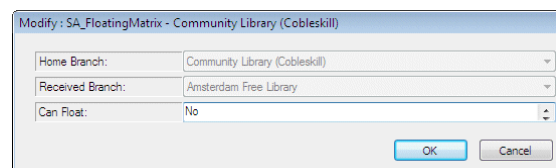


2. In the Received Branch list, select a branch to designate as a branch that can receive items from the home branch. Press **CTRL+click** or **SHIFT+click** to select multiple branches.

By default, **Can float** for each possible Received branch is set to **No**.

3. Click .

The Modify box opens.



4. Change **Can Float** to **Yes**, and click **OK**.
5. Repeat steps 2-4 to change additional "float to" (Received) branches.

1-2-3

Set the material types that cannot float

Even if an item belongs to a collection that a home branch allows to float, the home branch can prevent certain material types from floating. Follow these steps to set the material types that the home branch is not willing to allow to float, even if the items belong to a collection that is allowed to float.

Note:

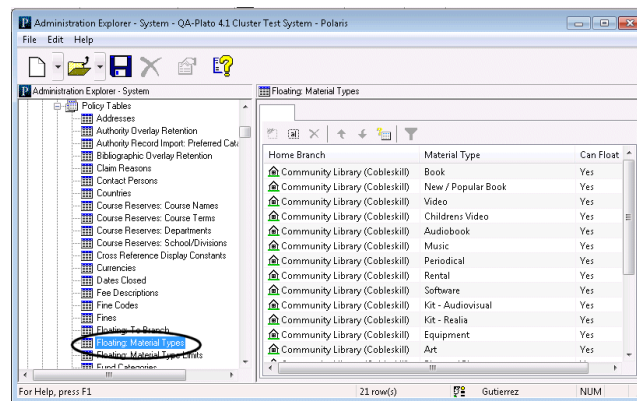
You need the system-level System Administration permission **Modify floating material types table: Allow** to do this procedure.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the home branch, and select **Floating: Material Types**.

Note:

To better manage memory, a program-defined row limit determines if this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

The Floating: Material Types table is displayed in the details view.

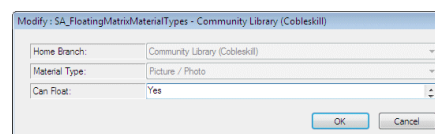


2. In the Material Type list, select a material type that should not float from the home branch. Press **CTRL+click** or **SHIFT+click** to select multiple material types.

By default, **Can float** for each material type is set to **Yes**.

3. Click .

The Modify box opens.



4. Change **Can Float** to **No**, and click **OK**.
5. Repeat steps 2-4 to designate additional material types that should not float.

1-2-3

Limit the floating items for the same title a branch can receive

You can limit the number of items attached to the same bibliographic record that the receiving branch will accept. For example, a limit of 20 on material type DVD indicates that the receiving branch will not accept more than 20 DVD copies of any given title. In determining how many items to bring in, the system counts how many of the items are immediately available (In), as well as how many of the items have floated to the receiving branch regardless of their current circulation status. Follow these steps to set limits on items linked to the same bibliographic record.

Note:

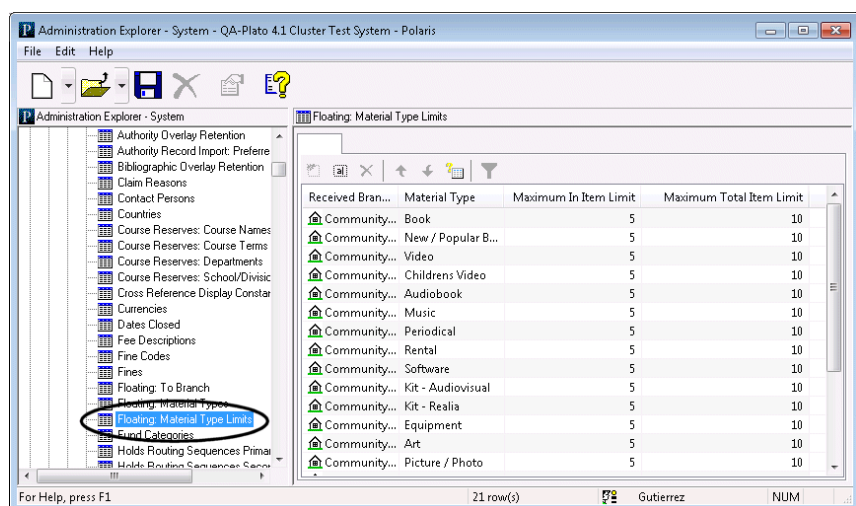
You need the system-level System Administration permission **Modify floating material type limits table: Allow** to do this procedure.

1. In the Administration Explorer tree view, select the *receiving* branch (the branch to which items will float).
2. Open the **Policy Tables** folder for the receiving branch, and select **Floating: Material Type Limits**.

Note:

To better manage memory, a program-defined row limit determines whether this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

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

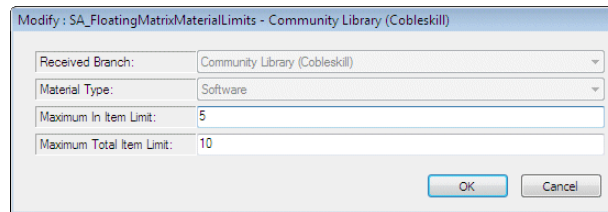


3. In the Material Type list, select the material type for which you want to change the receiving branch's limits.

By default, the maximum number of In items attached to the same bibliographic record for each material type is set to 5. The default maximum number of items of any circulation status is 10.

4. Click .

The Modify box opens.



5. Change the limit settings as appropriate, and click **OK**.

The Maximum In Item Limit can be 0 or greater.

The Maximum Total Item Limit must be 1 or greater.

Examples:

Due to normal circulation processes, you may end up with more floating items than your on-shelf (In) item limit. For example, your In Item Limit is set to 5. You have 4 items on the shelf, and you check another item in. You have reached the limit. Then you check out 2 of the items. Another item comes in and successfully floats to your branch because you have 2 less than your In limit. The two checked out items come back. All items are on the shelf, and they total to one more than the limit. You can manipulate the limit settings depending on the results you want:

- To closely enforce an on-shelf (In) limit, set the In Item Limit to any value greater than 1, and set the Total Item Limit to an equal or slightly greater value. For example, set the In Item Limit to 10 and the Total Item Limit to 12. The on-shelf limit is enforced but the total items may grow somewhat over the on-shelf limit. The Total Item Limit setting helps to control the expansion.

- To loosely enforce an on-shelf limit, set the In Item Limit to any value greater than 1, and set the Total Item Limit to a value much greater than the In item Limit. The on-shelf limit is enforced but the total items may grow over the on-shelf limit.

- To enforce only a total limit, set the In Item Limit to any value greater than 2, and set the Total Item Limit to any value equal or less than the In Item Limit (other than 1). For example, set the In Item Limit to 50 and the Total Item Limit to 10. This essentially overrides the on-shelf limit.

- To not impose any limits, set both limits to very high values (such as 99). This essentially turns off checking.

6. Repeat steps 2-4 for each material type for which you want to change the limits.

Related Information

You can display a prompt when checking in a floating item that would exceed the material type limits. See [“Set parameters and profiles for floating collections”](#) on page 374.

Setting Branch Parameters

You can set the appropriate Patron Services parameters and Cataloging profiles at the system, library, or branch level to fine-tune how floating collections work among the branches that participate. In addition, the Patron Services parameter **Floating enabled** controls whether a branch uses floating collections functionality at all. You may wish to set this parameter last, after reviewing all your settings for floating collections. Before you fine-tune and enable floating collections, do the following:

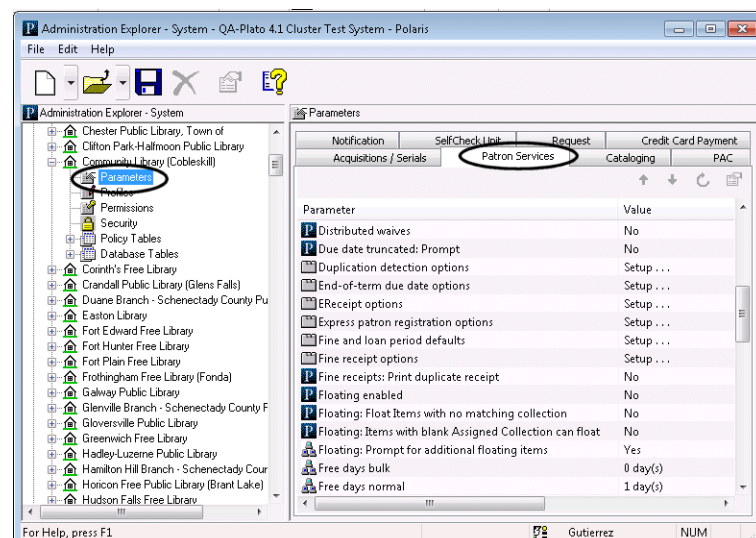
- ☐ Specify which collections are potentially eligible to float if you have not already done so. See [“Designating Floating Collections”](#) on page 366.
- ☐ For each home branch, set the branches that can receive the home branch’s floating items if you have not already done so. See [“Set the branches to receive floating items”](#) on page 370.
- ☐ For each home branch, set the specific material types that cannot float if you have not already done so. See [“Set the material types that cannot float”](#) on page 371.
- ☐ For each receiving branch, set the limits for In items attached to the same title and items of any circulation status attached to the same title. See [“Limit the floating items for the same title a branch can receive”](#) on page 372.

1-2-3

Set parameters and profiles for floating collections

Follow these steps to select the parameters and profiles that fine-tune and enable floating collections.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.



Tip:

See [“Cooperative Considerations for Floating Collections”](#) on page 361 for the effects of various settings of the two assigned collection parameters.

2. If you want items to float even if the receiving branch has no matching collection, set **Floating: Float items with no matching collection** to **Yes**. (The default setting is **No**.)

When this parameter is set to **Yes** and such an item is checked in at the receiving branch, the item's Assigned Collection is reset to blank (none assigned) for the new Assigned Branch.

3. If you want items with no assigned collection to float, set **Floating: Items with blank Assigned Collection can float** to **Yes**. (The default setting is **No**.)

Note:

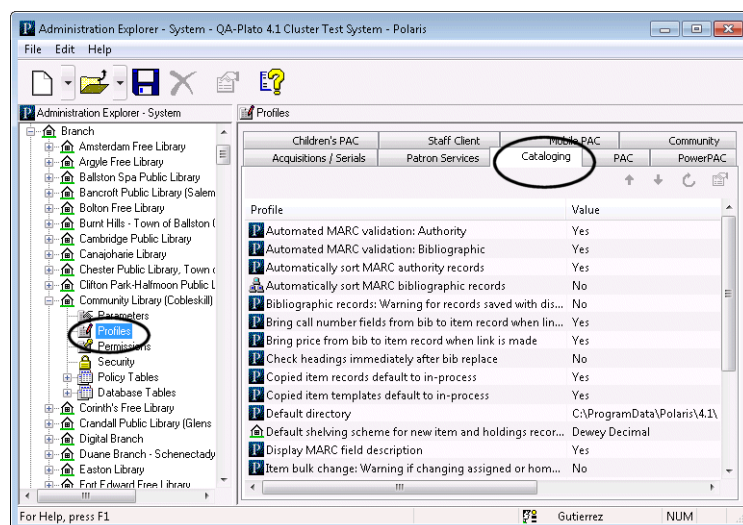
If you want *only* items with no assigned collection to float, do not designate any collections as eligible to float. Select receiving branches for the home branch, and set **Floating: Items with blank Assigned Collection can float** to **Yes** for the home branch. Then enable floating for both the home branch and the receiving branches.

4. To display a prompt at check in when material limits would be exceeded for the receiving branch, set **Floating: Prompt for additional floating items** to **Yes**. (The default setting is **No**.)

When this parameter is set to **Yes**, and a floating item is checked in, a prompt appears if the item would exceed the maximum limit for items attached to the same bibliographic record (see [“Limit the floating items for the same title a branch can receive”](#) on page 372). The staff member can override the limit and accept the item.

If you leave this parameter set to **No** and an item is over the limit, an in-transit prompt is displayed instead, and the staff member can put the item in-transit or check it in (the assigned branch and other parameters do not change to those of the receiving branch in this case).

5. In the Administration Explorer tree view, open the **Profiles** folder for the organization, and select the **Cataloging** tabbed page in the details view.



6. To display a warning message during item bulk change when the items' assigned and home branches are changed, set **Item bulk change: Warning if changing Assigned or Home branch** to **Yes**. (The default value is **No**.)

If you set this parameter to **Yes**, when the Assigned and Home branches are changed so that the two values are not the same, the warning message is displayed. You can continue or cancel to stop and reset the values. When the parameter is set to **No**, no warning message is displayed and the change continues.

7. To display a message when an individual item's assigned or home branch is changed, set **Item Records: Warning if changing Assigned or Home branch** to **Yes**. (The default value is **No**.)

If you set this parameter to **Yes**, when either the Assigned or Home branch is changed so that the two values are not the same, the message appears on the bulk change summary window. When the parameter is set to **No**, no message is displayed.

8. Enable floating collections for the organization by following these steps:
 - a) Check the floating collections policy and parameter settings for the organization.
 - b) In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
 - c) Set the parameter **Floating enabled** to **Yes**.

Important:

If this parameter is set to **No** for a branch, items will not float to the branch even if the branch is selected as a receiving branch in the home branch's Float: To Branch policy table. A home branch must also set this parameter to **Yes**; otherwise, no items will float even if a collection is designated as floating for the branch in the Collection workflow.

Floating Collections: Setup Examples

Here are some setup examples to help you decide how to set up floating collections processing for your system.

- **All items in a collection can float** - Let any items from the Biographies collection at Community Library float to branches A, X and Z:
 - In the Collections workform for the Biographies collection, select **Community Library** on the Floating branches view. This indicates that Community Library as the home branch will let items in this collection float. Refer to [“Designate collections as eligible to float”](#) on page 366.
 - In the Floating: To Branch policy table for Community Library, set Received branches A, X, Z to **Yes**. This indicates that Community Library allows items to float to these branches. Refer to [“Set the branches to receive floating items”](#) on page 370.
 - In the Floating: Material Type Limits policy tables for branches A, X, and Z, set the limits for items permitted to float to each receiving branch. Note that these limits are not set in the policy table for Community Library, but in the policy tables of the branches that will receive the items. Refer to [“Limit the floating items for the same title a branch can receive”](#) on page 372.
 - Set the Patron Services parameter **Floating enabled** to **Yes** for the home branch and the receiving branches.
- **All items in a collection can float except a certain material type** - Let all items from Community Library’s Biographies Collection except Reference material float to any branch:
 - In the Collections workform for the Biographies collection, select **Community Library** on the Floating branches view. This indicates that Community Library will let items in this collection float. Refer to [“Designate collections as eligible to float”](#) on page 366.
 - In the Floating: To Branch policy table for Community Library, set all Received branches to **Yes**. Refer to [“Set the branches to receive floating items”](#) on page 370.
 - In the Floating: Material Types policy table for Community Library, set the **Reference** material type to **No**. Refer to [“Set the material types that cannot float”](#) on page 371.
 - In the Floating: Material Type Limits policy tables for all receiving branches, set the limits for items permitted to float to each branch. Refer to [“Limit the floating items for the same title a branch can receive”](#) on page 372.
 - Set the Patron Services parameter **Floating enabled** to **Yes** for the home branch and the receiving branches.

- **All items of a certain material type can float** - Let any item of material type DVD-NonFiction float from Community Library to any branch:
 - From the Collections workform *for every collection*, select **Community Library** on the Floating branches view. This indicates that Community Library will let items in every collection float. Refer to [“Designate collections as eligible to float”](#) on page 366.
 - In the Floating: To Branch policy table for Community Library, set all Received branches to **Yes**. Refer to [“Set the branches to receive floating items”](#) on page 370.
 - In the Floating: Material Types policy table for Community Library, set any material types that should not float to **No**. See [“Set the material types that cannot float”](#) on page 371.
 - In the Floating: Material Type Limits policy tables for all receiving branches, set the limits for DVD-NonFiction items permitted to float to each receiving branch. Refer to [“Limit the floating items for the same title a branch can receive”](#) on page 372.
 - Set the Patron Services parameter **Floating enabled** to **Yes** for the home branch and the receiving branches.
- **Only items with no collection can float** - Let only items with no assigned collection float from Community Library to any branch:
 - In the Collections workform *for every collection*, be sure **Community Library** is *not* checked in the Floating branches view.
 - In the Floating: To Branch policy table for Community Library, set all Received branches to **Yes**. Refer to [“Set the branches to receive floating items”](#) on page 370.
 - In the Floating: Material Types policy table for Community Library, set any material types that should not float to **No**. See [“Set the material types that cannot float”](#) on page 371.
 - In the Floating: Material Type Limits policy tables for all receiving branches, set the limits for items permitted to float to each receiving branch. Refer to [“Limit the floating items for the same title a branch can receive”](#) on page 372.
 - Set the Patron Services parameter **Floating: Items with blank Assigned Collection can float** to **Yes** for Community Library. Refer to [“Set parameters and profiles for floating collections”](#) on page 374.
 - Set the Patron Services parameter **Floating enabled** to **Yes** for the home branch and the receiving branches.

Floating Collections: Troubleshooting

You have designated floating collections and assigned branches to the collections. For each home branch, you have set float-to branches and determined which material types can float. Now you have scanned an item from another branch and the item went to In-transit instead of floating to your branch. What happened?

- Check the item's material type. Is this a material type that is set to float?
- Check your limits by material type for the receiving branch. Is this item over the limit?
- Check the Floating parameters (**Parameters, Patron Services**) for the receiving branch. Has floating been enabled?
- Does the item have an assigned collection? If not, check the setting for the Patron Services parameter **Floating: Items with blank Assigned Collection can float**.
- Does the assigned collection of the incoming item match a collection used by the receiving branch? If not, check the setting for the Patron Services parameter **Floating: Float Items with no matching collection**.

Floating Collections Reports

Floating collections reports are available to help you gather statistics about floating items in your system, and to summarize home branch settings. To access these reports, select **Utilities, Reports and Notices, Circulation**.

- For information on generating reports, see [“Using Polaris Standard Reports”](#) in the *Polaris Basics Guide 4.1R2*.
- For detailed descriptions of specific reports, see [“Floating Collections Reports”](#) in the *Polaris Basics Guide 4.1R2*.

Managing Offline Circulation



Your library can use Polaris offline when the Polaris server is not accessible, such as during an upgrade or when you use the Bookmobile. The offline database files contain the public catalog, patron records, and transactions that occurred while disconnected from the main server.

When you are done working offline, you transfer the transaction files from the offline client to an online staff client. Then you upload the transaction files from the staff client to the Polaris server and review the transaction report for warning messages.

Important:

The procedures described in this unit differ for Polaris Hosted customers. Polaris Hosted customers can find specific instructions for installing the Polaris staff client and working offline on the Polaris Hosted Utilities page or the Polaris customer Extranet.

See the following topics:

- [“Setting Up Offline Circulation”](#) on page 382
- [“Working Offline”](#) on page 385
- [“Uploading to Online Polaris \(Bookmobile\)”](#) on page 386

Setting Up Offline Circulation

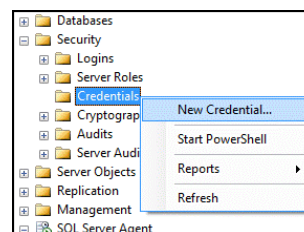
Before you use offline Polaris, you must copy several files from your Polaris server to your offline client. Each night, the SQL job **OfflineExtract** updates these files automatically. If you are setting up offline Polaris at a time other than at the beginning of the day, you must manually run the SQL Server job before copying the files to the offline client. You can copy the files to the offline client manually (see [“Set up offline Polaris”](#) on page 383) or automatically (see [“Copying Files to the Offline Client Automatically”](#) on page 382).

Copying Files to the Offline Client Automatically

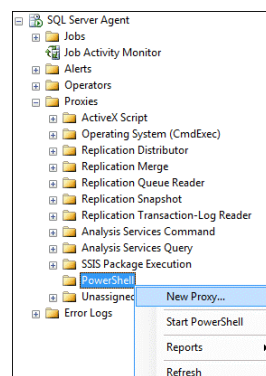
Administrators can use the SQL job **CopyOfflineFiles** to have the SQL Agent automatically update the offline files on designated workstations. This job is disabled by default because it must run under an account that has rights to copy the files to the local workstations on the network.

To do this, you must create a SQL Server credential, then associate this credential with PowerShell by creating a proxy account under which the PowerShell process will run to allow access to those workstations. The credential name and proxy name can be anything you choose.

First create the credential. The credential account must be a domain account that has rights to the domain workstations to which the job will copy the offline files.



Then create the proxy.



1-2-3

Set up offline Polaris

Follow these steps to set up offline Polaris.

Note:

This procedure does not apply to Polaris Hosted customers. Polaris Hosted customers can find specific instructions on the Polaris Hosted Utilities page, or go to www.polaristown.com.

1. To copy the offline Polaris files from the server at a time other than at the beginning of the day, manually run the SQL Server task, **Offline Extract job**. See [“Manually update the offline files”](#) on page 384.
2. Select the following files in the **ProgramData\Polaris\[version]\Offline** folder on your library’s server:
 - **PolPatron.mdb**
 - **PolSystem.mdb**
3. Copy the files to one of the following folders in the offline client:

Note:

Administrators can have the files copied automatically. See [“Copying Files to the Offline Client Automatically”](#) on page 382.

- **If no datalink is used**

Local drive: \ProgramData\Polaris\[version]\offline

The folder *Local drive:* \ProgramData\Polaris\[version]\offline is created by default when the staff client is installed. If you are using multiple offline clients, you must copy the .mdb files to each offline client.

- **If a datalink is used**

Local drive: \ProgramData\Polaris\[version]\datalink\offline

Note:

Administrators can override the default location with a registry entry, and create a convenient location in a common area such as a network share. First create a **Polaris** or **UDL instance** (if there is one) folder at that location. However, do not include the new folder in the registry entry, because it is automatically appended. The registry entry should consist of *network path\offline*.

You are ready to work in offline Polaris.

Related Information

- **Log on to the offline client and do transactions** - See [“Working Offline”](#) on page 385.
- **Upload transaction files to an online client** - See [“View and upload offline transaction files”](#) on page 387.

1-2-3

Manually update the offline files

Follow these steps to manually run the SQL Server job that updates the offline files. This job runs automatically each night, but you need to run it manually if, for example, you want to start using offline Polaris in the middle of the day and include that morning's transactions in the offline database.

Note:

This procedure does not apply to Polaris Hosted customers. Contact your Polaris Site Manager if it is necessary to update the offline files manually. Polaris Hosted customers can also find specific instructions for working offline on the Polaris Hosted Utilities page or the Polaris customer Extranet.

1. From any in-library client with SQL Server, display the SQL Server Enterprise Manager window.
2. Select the production server, and display the contents of the following folder:
Management\SQL Server Agent\Jobs
3. Right-click the **Offline Extract job**, and select **Start job** from the context menu.

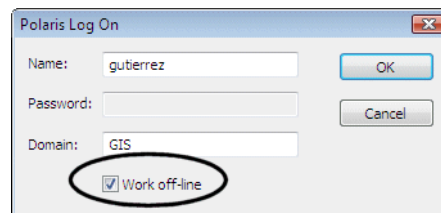
The job runs, and the offline files are updated.

Working Offline

To log on to offline Polaris, you select the **Work off-line** check box on the Polaris Log On dialog box, in addition to typing your log-on information.

Note:

Polaris Hosted customers should not connect to Polaris Terminal Server to work offline.

**Note:**

Your workstation may be set to automatically log you on when you open Polaris, and the Log On dialog box is not displayed. In this case, select **File, Log Off**, then **File, Log On** to display the Log On dialog box. For more information about setting Polaris for automatic log-on, see [“Automatic Staff Client Log-On”](#) in the *Polaris Administration Guide 4.1R2*.

Each time you log on to Polaris in the offline mode, Polaris creates a new transaction file for the session and automatically generates a file name.

Once you have logged on, you are ready to work offline. You can do the following tasks when using offline Polaris:

- **Register patrons** - See [“Patron Registration”](#) in the *Polaris Patron Services Guide 4.1R2*.

Note:

Patron records created offline receive a Verify Patron block. For information about removing the block, see [“Resolve a Verify Patron block”](#) in the *Polaris Patron Services Guide 4.1R2*.

- **Check out items and print check-out receipts** - See [“Checking Out Items to Patrons”](#) in the *Polaris Patron Services Guide 4.1R2*.

Note:

In offline circulation, the due date calculation is based on the Standard Loan Period of the workstation’s branch, not the user’s branch. However, the Loaning Branch recorded in the transaction and in the item record is the logged-on user’s branch. This allows libraries to gather statistics for different bookmobile stops based on user log-on, while maintaining a consistent loan period for the bookmobile (the workstation branch).

- **Check in items** - See [“Doing Normal Item Check-Ins”](#) in the *Polaris Patron Services Guide 4.1R2* and [“Doing Bulk Item Check-Ins”](#) in the *Polaris Patron Services Guide 4.1R2*.

When you have finished working offline, you upload the transaction files to the server. See [“Uploading to Online Polaris \(Bookmobile\)”](#) on page 386.

Uploading to Online Polaris (Bookmobile)

When you are done using offline Polaris, you upload the transaction files from the offline client to online Polaris. When you upload the files, a report (log file) is created. The file extension changes from **.TRN** to **.LOG**. For example, the file name **PTF 2012 06 01 0913 _workstation name.LOG** consists of the following elements:

- PTF is an abbreviation for Polaris Transaction File
- 2012 is the year the file was created
- 06 is the month
- 01 is the day
- 0913 is the time (using the 24 hour clock)
- workstation name is the machine name of the offline client
- LOG is the extension

Under certain conditions, warning messages appear in the upload report. This generally occurs when an item was checked in or checked out offline, but the circulation status is *not* In or Out when uploaded to online Polaris. The item that circulated offline would have caused a block or alert if it had circulated online; for example, a patron exceeds the overdue item limit at check-out, or an item that fills a hold request is checked out. The warning messages in the upload report alert the staff that some follow-up action or an automatic update by Polaris may be necessary. See [“Upload Report Warning Messages”](#) on page 389.

Holds Processing at Upload

When an offline file with check-in transactions is uploaded, eligible items are trapped for holds by default. This may be a problem for some libraries, where staff might overlook the upload report indicating that an item has been trapped, and reshelve the item instead of holding it. In this case, set the Patron Services parameter **Offline: Trap holds at check-in** to **No** to suppress any holds processing when offline check-in transactions are uploaded. The default setting is **Yes**, which allows holds processing at upload. The parameter is available at the system, library, and branch levels.

1-2-3

View and upload offline transaction files

Follow these steps to view and upload offline transaction files to your online client.

Important:

You can upload transaction files to any directory, anywhere on the network share. But you must first create the appropriate **Polaris\[version]\offline** folder in that directory, before you upload the files.

Note:

This procedure differs for Polaris Hosted customers. Polaris Hosted customers can find specific instructions on the Polaris Hosted Utilities page or the Polaris customer Extranet.

When you are done using offline Polaris, copy the transaction files from each offline client to the same location on your online (or in-library) staff client workstation (located by default at

Local Drive:\ProgramData\Polaris\[version]\OfflineTransaction
or

Local

Drive:\ProgramData\Polaris\[version]\datalink\OfflineTransaction)

Note:

Administrators can specify the filepath for offline transaction files on the workstation during staff client installation.

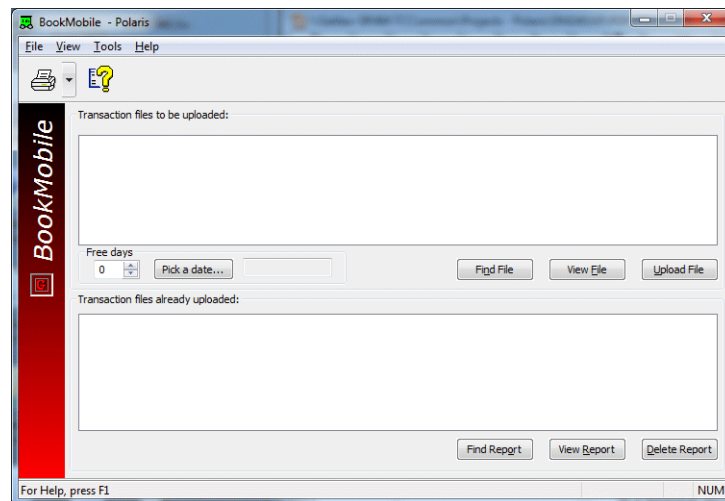


Tip:

Click this button on the Shortcut Bar to display the Bookmobile workflow.

1. Using your online staff client, select **Circulation, Bookmobile** from the Polaris Shortcut Bar.

The Bookmobile workflow appears. The list displays the transaction files available on the local drive.



In a terminal server environment, specify which transaction files you want to display in the **Transaction files to be uploaded** list:

Select **Tools, Options**. The Bookmobile: Tools Options dialog box appears. Then select a **Display files** option:

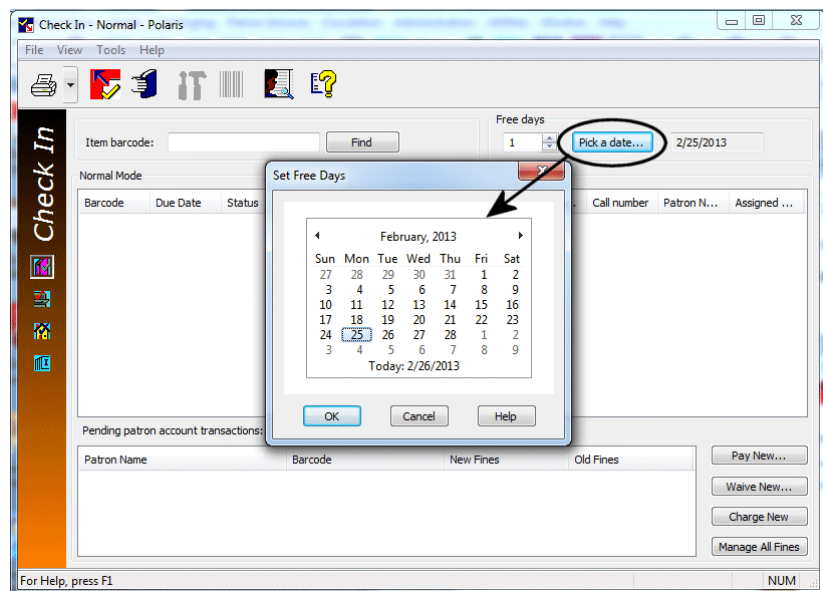
- for **logged on user** - Files created by the user currently logged on
- for **logged on user's branch** - Files created by any user for the branch

- **All** - All transaction files on the computer. In non-terminal server environments, **All** is selected and cannot be changed.

Note:

If the transaction files were created in a non-terminal server environment, but you are working in a terminal server environment, you can click **Find File** (or press **ALT+N**) and navigate to the local machine's files. Select the files (up to 50 at a time) to list them.

- To view files before uploading them, follow these steps:
 - Select the transaction files in the **Transaction files to be uploaded** list. You can select up to 50 files at a time.
 - Click **View File**.
The View Transaction file dialog box displays the files.
 - When you are finished viewing the files, click **Close** on the dialog box.
- Specify the number of days to omit from overdue fine calculation, if any, in the **Free days** box or click **Pick a date** and select a date from the calendar. See "**Free Days**" on page 227.



When you select a date from the calendar, the system automatically calculates the number of free days. The date box reflects the number of free days selected.

The specified number of days will be omitted from fine calculation when check-in transactions are uploaded. If you do not enter a value, the system uses the value set by the Patron Services parameter **Free days (bulk)** in Polaris Administration parameters. See "**Free Days**" on page 227.

- To set error handling during upload, follow these steps:
 - Click **Upload File**.

The Error Stop Option dialog box appears.

b) Choose one of the following options, and click **OK**.

- Click **stop on errors** if you want the file upload process to stop for any file in which Polaris finds an error. When errors are found, a message indicates why the file is not being uploaded.
- Click **continue and get error report in the end** if you want Polaris to complete the file upload process and then compile an error report.

5. Click **Upload File** to upload the selected files.

The files are transferred to the **Transaction files already uploaded** list with a .log extension.

6. To view the report, select the file in the **Transaction files already uploaded** list, and click **View Report**.

If the log files were created in a non-terminal server environment, but you are working in a terminal server environment, you can click **Find Report** (or press **ALT+O**) and navigate to the local machine's files. Select the files to display them in the **Transaction files already uploaded** list.

Important:

Always review the report for errors after uploading offline files. See ["Upload Report Warning Messages"](#) on page 389.

Related Information

- **Delete a transaction report** - In the Bookmobile workflow, select the log file in the **Transaction files already uploaded** list, and click **Delete report**.

Upload Report Warning Messages

A report of warning messages is created automatically when you upload offline transaction files to the online Polaris client. The report may contain any of the following messages related to the offline transactions.

Warning Messages for Barcodes, Blocks, Closed Day/Date

The following situations generate warning messages in the upload report:

Barcodes (invalid, unexpected, assigned)

At circulation, these situations generate messages:

- An item with an invalid barcode type is circulated.
- An item is checked out, but the patron barcode is an invalid type.
- An item is checked out, but the patron barcode is an item barcode type.
- An item with a patron barcode type is circulated.

At patron record creation, these situations generate messages:

- A barcode format is for an item instead of a patron.
- A barcode format is unrecognized.
- A barcode is already assigned.

Item blocks	An item is checked in with a free-text, library-assigned, or system block.
1st level fine limit (by patron code and branch)	A patron exceeds the 1st level fine limit at check-out/renewal.
2nd level fine limit (by patron code and branch)	A patron exceeds the 2nd level fine limit at check-out/renewal.
Item limit by material type (by patron code and branch)	A patron exceeds the number of items of a specific material type that can be checked out.
Total item limit (by patron code and branch)	A patron exceeds the total number of items that can be checked out.
Overdue item limit (by patron code and branch)	A patron exceeds the overdue item limit at check-out. A patron exceeds the overdue item limit at renewal. An overdue fine is charged.
Overdue item limit (by patron code and branch) with long overdues	A patron exceeds the overdue item limit at check-out and has long overdue items. A patron exceeds the overdue item limit at renewal and has long overdue items. An overdue fine is charged.
Long overdues	A patron has long overdue items at check-out/renewal.
Renewal limit	A patron checks out an item, and the item exceeds its renewal limit.
Closed day/date	An item's original due date is changed to the next open date because the original date falls on a day closed (Hours of operation parameter) or a date closed (Dates Closed policy table).

Warning Messages for Item Statuses

The following item statuses generate warning messages in the upload report:

Bindery, Damaged, In-Repair	The item status was Bindery (or Damaged or In-repair) before the item was circulated.
Claim	The item status was Claimed missing or Claimed never had before the item was circulated.
Held	An item with a held status is checked out, and Polaris compares the borrower's barcode to the requestor's barcode. If the barcodes are identical, the request status is filled and the request is deleted. If the barcodes are <i>not</i>

identical, the request status remains active. The request is reactivated for the requestor's barcode. If an item that *might* fill a hold request is checked in, the item status and the request status become held.

Note:

You can suppress holds processing for checked-in items at upload. See [“Holds Processing at Upload”](#) on page 386.

In-Process The item status was in-process before the item was circulated.

In-Transit The item status was in-transit before the item was checked out. An item is bound to a hold request, and the item status was in-transit before the item was checked out.

The item status was in-transit before the item was checked in. Polaris checks for the destination library and any bound hold request:

- If there is no hold request and the assigned branch is not the check-in branch, send the item to the assigned branch.
- If there is no hold request and the assigned branch is the check-in branch, nothing needs to be done.
- If the item is bound to a hold request and the pickup branch is not the check-in branch, send the item to the pickup branch.

Lost The item status was lost before the item was circulated. Delete the replacement cost for the last borrower.

Transferred The item status was transferred before the item was circulated. The item retains its transferred status, with a hold request status of shipped. Send the item to the pickup library.

Messages Related to Reserve Items (Course Reserves)

Library Use Only A reserve item was checked out offline. The reserve status is On Reserve, and Library Use Only is checked; that is, the reserve item is intended to be used only within the library. The message includes the item barcode and title.

Total number of items exceeded A reserve item was checked out offline. The reserve status is On Reserve and the Total Number of Reserve Items in the Patron/Material Type Loan Limits table has been exceeded. The message includes the patron name and patron barcode.

Reserve item checked in A message is written if a reserved item was checked in. The message includes the item barcode and title.

Item linked to more than one course When a reserve item is checked out offline, and the item is linked to more than one course, the system logs the check-out to the first course listed for the item and writes a message to the log file. The message includes the item barcode, title, and the course name, number, and section of the course credited with the circulation.

Setting Statistical Codes for Reports



Some Polaris circulation reports depend on patron and item statistical codes. Although statistical codes are not required for Polaris to work, you must define them in the Polaris Administration policy tables Patron Statistical Class Codes and Item Statistical Class Codes to do statistical reporting.

See the following topics:

- [“Defining Patron Statistical Codes”](#) on page 393
- [“Defining Item Statistical Codes”](#) on page 396

Defining Patron Statistical Codes

Patron statistical codes are useful for demographic or other reports an organization may require. They should not duplicate patron codes, but you can use them to make finer distinctions in patron code categories. For example, statistical codes might be defined for district residence, course major, or society membership. Unlike patron codes, statistical codes do not affect circulation limits or fine calculations. They are used for reporting purposes, and you can limit Find Tool searches for patron records by statistical class (code). The patron statistical codes are displayed for selection in the **Statistical class** box on the Patron Registration workform-General view.

The screenshot shows the 'New Patron Registration 1 - General - Polaris' window. On the left is a red sidebar with the word 'Registration' and several icons. The main form area has a 'General' tab selected. Fields include: Barcode, Last name, First name, Middle name, Title, Suffix, Registered at (Community Library (Cobleskill) (COB)), Patron code (Regular), Expiration (Term: 3 years, Date: 7/12/2014), Gender (Male, Female, N/A), Statistical class (dropdown menu open showing a list of locations), Password, Language, Former barcode, Birth date, Date of original registration, Last activity date, and several checkboxes for exclusion from collection, overdue notices, hold notices, and billing. On the right, there are 'User defined fields' including ID Number, Privileges / Restrictions, Voter Registration, CybraryN Use Only (XXX,YYY), and Not Currently In Use. A 'NUM' button is at the bottom right.

You define the available statistical codes in the Patron Statistical Class Codes policy table. This table can be opened on an organization workform or with the Administration Explorer. Statistical codes can be defined from the system, library, and branch levels. If a branch needs statistical reporting, you must specify statistical codes for that branch. They are not inherited from a parent organization.

When you open this table at the system level, you can view, add, and change entries for any branch. At the library level, you can view, add, and change entries for any branch that is part of the library. At the branch level, you can view, add, and change entries for the selected branch.

Note:

These System Administration permissions are required to work with this table: **Access administration: Allow, Access tables: Allow, Modify patron statistical class codes table: Allow.**

1-2-3

Add a patron statistical code

Follow these steps to add a patron statistical code to Polaris for reporting purposes.

Note:

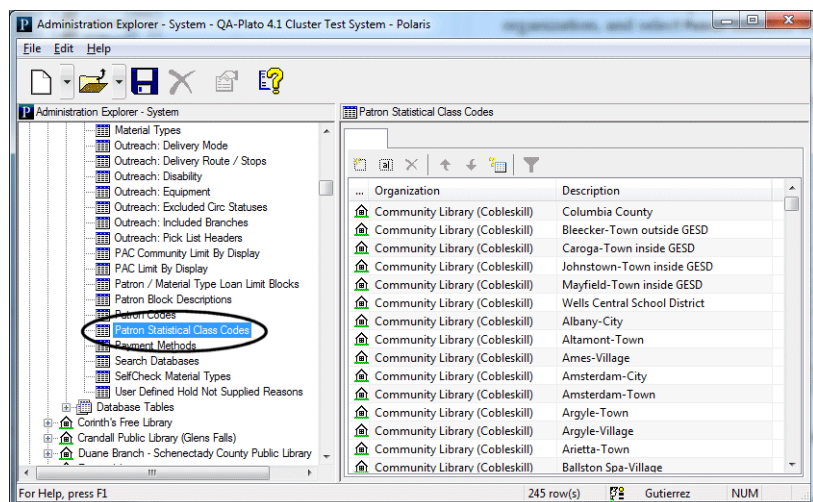
Check the table for duplicates before you enter a new statistical code. You cannot remove entries from the Patron Statistical Class Codes policy table.

1. In the Administration Explorer, expand the **Policy Tables** folder for the organization, and select **Patron Statistical Class Codes**.

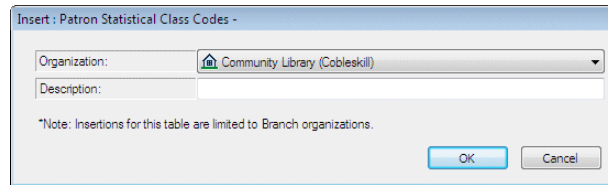
Note:

To better manage memory, a program-defined row limit determines whether this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

The Patron Statistical Class Codes table appears in the details view.



2. Click  to display the Insert Patron Statistical Class Codes dialog box.

**Note:**

If the Patron Statistical Class Codes policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

3. Select the branch in the **Organization** list to which the new statistical code belongs.
4. Type the statistical code description in the **Description** box, and click **OK**.
The new entry is displayed in the Patron Statistical Class Codes policy table. **Modification pending** appears in the status bar.
5. Select **File, Save** to save your changes.
Record saved appears in the status bar.

Related Information

Modify a table entry - Select the entry, click , and change the description. Changes to a statistical code entry affect all patron records that used the original wording of the entry, so you should limit changes to correcting spelling or using similar wording.

Defining Item Statistical Codes

Item statistical codes are useful for creating specific circulation reports an organization may require. You can also limit Find Tool searches for item records by statistical code. (Unlike material type definitions, statistical codes do not affect loan limits.) Statistical codes should not duplicate material type, collection, or genre descriptions, but you can use them to make finer distinctions for any of these. For example, a branch might define item statistical codes for Adult Books on Compact Disc and Comic Books, among others. As another example, some libraries use these codes to break out shelving areas into smaller units for reporting purposes, so that Adult Non-Fiction is broken down with a statistical code for call numbers 000-099, another for 100-199, another for 200-299, and so forth. The item statistical codes are displayed for selection in the **Statistical code** box on the Item Record workform.

The screenshot shows the 'Item Record 213307 - Cataloging - Polaris' window. The 'Stat code' dropdown is open, showing a list of statistical codes. The 'Children's Fiction' code is highlighted. The workform also displays fields for Barcode, Title, Author, Call number, Owner, Assigned, Collection, Circulation parameters, and Request.

You define the available statistical codes in the Item Statistical Class Codes policy table. The policy table can be opened on an organization workform or with the Administration Explorer. If a branch needs statistical reporting, you must specify statistical codes for that branch because they are not inherited from parent organizations.

When you open the policy table at the system level, you can view, add, and change entries for any branch. At the library level, you can view, add, and change entries for any branch that is part of the library. At the branch level, you can view, add, and change entries for the selected branch.

Note:

These System Administration permissions are required to work with this table: **Access administration: Allow, Access tables: Allow, Modify item statistical class codes table: Allow.**

1-2-3

Add an item statistical code

Follow these steps to add an item statistical code for reporting purposes.

Note:

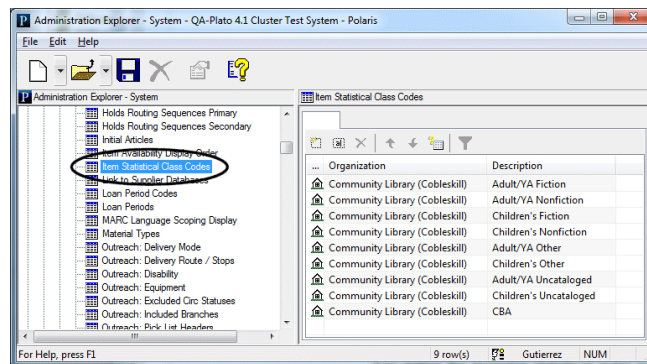
Check the table for duplicates before you enter a new statistical code. You cannot remove entries from the Item Statistical Class Codes table.

1. In the Administration Explorer, expand the **Policy Tables** folder for the organization, and select **Item Statistical Class Codes**.

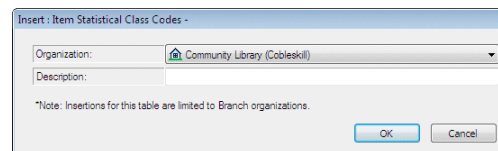
Note:

To better manage memory, a program-defined row limit determines whether this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

The Item Statistical Class Codes table appears in the details view.



2. Click  to display the Insert Item Statistical Class Codes dialog box.



Note:

If the Item Statistical Class Codes policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

3. Select the branch in the **Organization** list to which the new statistical category belongs.
4. Type text describing the statistical classification in the **Description** box.
5. Click **OK**.

The new entry is displayed in the Item Statistical Class Codes policy table. **Modification pending** appears in the status bar.

6. Select **File, Save** to save your changes.

Record saved appears in the status bar.

Related Information

Modify a table entry - Select the entry, click , and change the description. Changes to a statistical code entry affect all item records that used the original wording of the entry, so you should limit changes in statistical descriptions to correcting spelling and using similar wording for a given statistical code.

Managing Notification



Your library can send a variety of notices to patrons and staff. Polaris Administration settings determine which types of notices are automatically generated and how they are delivered. The following notice types are available:

- Overdue notices (1-3)
- Bills
- Fine notices
- Request pick-up, second pick-up, and cancelled request notices
- Reminders (e-mail only, with optional additional text message)
- Combined notices that can include overdue, bill, and request notices going to the same patron
- Serial claim notices (see [“Set up claiming notification”](#) in the *Polaris Serials Guide 4.1R2*)
- Routing notices (see [“Set up routing notices”](#) in the *Polaris Serials Guide 4.1R2*)
- Patron billing statements that list all the outstanding charges on a patron’s account

You can customize many notice elements in Polaris Administration, and use Polaris WebAdmin (Language Editor) to customize notice text. In addition, because notices are generated with Polaris Reports, you can customize the standard Polaris notice formats and any system-generated information using Report Manager and Visual Studio.net.

See the following topics:

- [“Setting Up Notices”](#) on page 400
- [“Overdue Notices, Bills, and Combined Notices”](#) on page 413
- [“Request Pick-Up, Second Pick-Up, & Cancelled Request Notices”](#) on page 421
- [“Fine Notices”](#) on page 428
- [“Reminder Notices”](#) on page 432
- [“Printing Notices”](#) on page 435
- [“Delivering Notices By E-mail”](#) on page 442
- [“Delivering Notices by Text Message”](#) on page 445

Setting Up Notices

You can set up notification options at the system, library, or branch level that specify the kinds of notices used, the library that generates the notices, the delivery methods, notice intervals, language, and other options. Then, based on these settings, Polaris periodically processes the notices, identifying which patrons and items should be included in the next notification cycle and placing them in the notice queue until the actual notices are produced. The notices in the queue are sent according to the specified delivery method. Once notices are generated, the notice queue is cleared and the process begins again.

The Notification Library

The notification library is the library responsible for producing and sending the notice and whose return address ordinarily appears on the notice. (If notices are generated for all libraries or branches from a central location, you can specify a central processing branch return address instead.) For overdue, bill, and fine notices, you can designate the patron's branch, the item's branch, or the lending branch as the notification library. This setting determines how patrons and items are identified for notification, based on the settings of the designated notification library.

For example, the notification library setting affects which patrons should receive overdue notices in these ways:

- **Notification library is patron's library** - If the patron's record includes one or more overdue items, and if the patron's registered branch is the notification library, a notice is generated from the patron's library for all the overdue items, regardless of the items' assigned branches or where the items were checked out.
- **Notification library is item's library** - If the patron's record includes one or more overdue items having an assigned branch that is the notification library, a notice is generated from the item's assigned branch for those items. A patron can receive more than one overdue notice from different branches, each notice listing different items.
- **Notification library is lending library** - If the patron's record includes one or more overdue items having a lending branch that is the notification library, a notice is generated from the lending branch for those items. A patron can receive more than one overdue notice from different branches if the overdue items were checked out at different branches.

It is also possible for branches to set the notification library for bills so that a patron can receive two bills for the same item. You may want to avoid this situation by coordinating the bill notification library settings among branches, even if you allow a patron to receive more than one overdue notice from different branches.

Example:

Library A sets the overdue notification library to loaning branch. That is, they send overdue notices to borrowers transacting at Library A. Library B sets the overdue notification library to patron's branch. That is, they send overdue notices to Library B patrons. If a Library B patron borrows an item from Library A, and the item goes overdue, the patron gets an overdue notice from Library A *and* Library B. The Library B notice includes the overdue items transacted at Library A as well as any other overdue items the patron may have. If Library A and Library B set their notification library for bills in the same way, the patron may receive two bills for the same item.

You can avoid the potential confusion of duplicate bills if all branches use the same setting for the bill notification library. However, even if the settings allow the patron to receive two bills for the same item, the patron's account is charged only once. In this case, the Organization column in the Patron Status workform - Account view indicates **System** for the bill, rather than Library A or Library B.

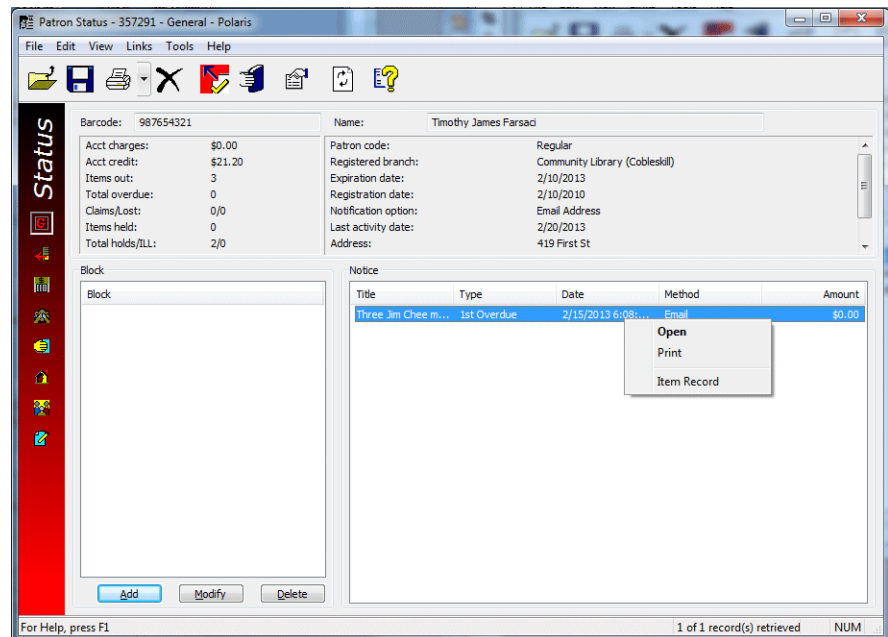
Bills are triggered when the specified number of overdue notices have been sent. If the notification library for overdues is different from the notification library for bills, it is possible that a patron will not receive a bill at all. To prevent this situation, libraries should coordinate their settings.

Example:

The notification library for overdue notices (Library A) is the loaning branch and this branch sends two overdue notices. The notification library for bills (Library B) is the item's assigned branch, and this branch sends three overdue notices. The bill will not be triggered until three overdue notices have been sent, but this will not happen because Library A sends only two overdue notices.

The Notification History

A staff member can view a patron's notification history from the Patron Status workform - General view and the Patron Registration workform - Status view. Staff members can open or print a patron's notices from this view, or link to the related item records for overdue, bill, overdue reminder, and hold notices. The illustration shows a sample Patron Status workform.



Entries are retained in the notification history for periods you specify with two Polaris Administration Notification parameters, available at the system, library, or branch level:

- **Notice history: hold notices time threshold** - Controls how long pick-up and cancelled hold notices are kept in the notice history. The default setting is 90 days; the maximum value is 9,999 days.
- **Notice history: item and account notices time threshold** - Controls how long overdue, fine, bill, and reminder notices are kept in the notice history. The default setting is 90 days; the maximum value is 9,999 days.

An entry is kept in the notification history if it falls within the specified period of time, the related item is checked out, claimed or lost by the current patron, and current charges are not resolved. The entry is kept under these circumstances even if the related item is purged or deleted from the database; in this case, the title is prefixed by **[DELETED]**.

Note:

Additional text message notices, which are sent in addition to another method, do not appear in the patron's notification history. For example, if both a printed notice and an additional text message notice are sent for an item, only the printed notice appears in the notification history.

Calculating the Number of Days to Keep the Notice History

The number of days to keep the notice history is counted from the date following the notice through and including the number of days you specify in Polaris Administration. The notice is then cleared from the history during overnight processing.

Example:

The **Notice history: hold notices time threshold** parameter is set to **10**. A hold notice was generated on the 1st day of the month. The notice history will be cleared on the 12th when the overnight process runs after midnight, counting from the 2nd of the month (the date following the date the notice was generated) through the 11th.

Notice Delivery Methods

You can specify the delivery method for most notices as print, e-mail, text message to mobile phone, phone (if you use outbound telephony software), or patron preference (print, e-mail, phone, text message). Patron preference is set up during patron registration, when the patron selects a preferred delivery method for notices. The setting is available in the **Notification option** box on the Patron Registration workform - Addresses view.

Note:

If the **Notification option** is set to **None** in a patron's record, that patron will receive no notices at all.

Patron Registration - 357291 - Addresses - Polaris

File Edit View Links Tools Help

Barcode: 987654321 Registered at: Community Library (Cobleskill) (COB)

Last name: Farsadi Patron code: Regular

First name: Timothy

Middle name: James

Title: Suffix:

Expiration: ☒ Instructor (Primary)

Term: 0 Date: 2/10/2013

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Zip Code	County	Country
Home	419 First St		LIVERPOOL	NY	13088	ONONDAGA	USA
Work	314 Second St.		LIVERPOOL	NY	13088	ONONDAGA	USA

Address Check

Term: 0 Date: 2/10/2011

Add... Edit... Remove Mailing Label

Notices/bills address: Home

Notification option: **Email Address**

☐ Additional TXT notice

eReceipt option: (None)

Email address: liverpoolhistorian@yahoo.com

Alt Email address:

Phone 1: 315-451-3639 ☐ TXT

Phone 2: 315-123-4567 Verizon ☒

Phone 3: ☐

FAX number:

For Help, press F1 NUM

Also, you can optionally send text messages to patrons' mobile phones in addition to print, e-mail, or voice phone notification. A patron will receive the additional text message only if the **Additional TXT notice** option is checked in the patron record, the **TXT** box is checked for **Phone 1**, **Phone 2**, or **Phone 3**,

and a carrier is specified for that phone number. If a patron registers or updates account information online through Polaris PowerPAC and supplies a phone number for text messages and a carrier, this option is automatically checked.

If you select a delivery method for a particular kind of notice other than patron preference, the method you specify overrides the patron preference if the methods do not match.

Example:

A library decides to send overdue notices according to patron preference, but to send bills only as print notices. A patron who has specified a preferred delivery method of e-mail receives overdue notices by e-mail, but receives a bill as a printed notice.

There are certain exceptions. If the delivery method is e-mail or phone, but Polaris detects an e-mail failure or a phone failure, Polaris generates a printed notice. (For more information about e-mail failures, see [“E-Mail Failure Detection”](#) on page 443). Also, if the delivery method is patron preference, and the patron’s preference is changed, notices are not duplicated. This means that if a notice is delivered by one method and then the patron record is changed to a different delivery method, Polaris does not deliver the same notice again by the new method.

Hold Notice Processing for E-Mail and Text Message Notices

A separate SQL job, **Hold Notice Processing**, processes e-mail and text message (SMS) first and second hold notices separately from print notices and phone notices. Designed to run multiple times per day, by default the job runs every 4 hours from 9:00 a.m. to 8:00 p.m. by default.

With this method, e-mail and text message notices are not sent in the early morning when the print notification job runs. Patrons can receive their notices sooner because the notification can be scheduled to be more closely timed with your library’s workflow for filling the requests. If your library has self-pickup for requested materials and you stock the shelves at certain times during the day, you can time the notices to go out near the time the items will be ready for pickup.

Delivery Methods for Serial Claim Notices

For serial claim notices, you can specify a delivery method of print, e-mail, or supplier preference. The supplier preference method is indicated in the supplier record. If you select a delivery method other than supplier preference, the method you specify overrides the supplier preference if the methods do not match.

Exporting Notices to a Notification Service

You can set up notification in Polaris Administration to export both print and phone notices to a third-party service. If your library has a contract with a service such as Unique Management Services (UMS) to send printed notices, you can export overdue, bill, fine, request pick-up, and request cancellation notices directly to the vendor. The following information from the patron record is included in the exported notices file:

- Last name, first name, middle name, title, suffix
- Patron barcode
- Patron code description
- Registered branch name
- Address for notices and bills (if none has been defined, the home address is used; if there is no home address, the first available address is used)
- Phone numbers
- E-mail addresses, primary and alternate
- Preferred language

The following additional information is included for each notice type:

- **Overdue notices and bills** - Item title, author, material type, barcode, call number, due date, check-out location, check-out date, and overdue notice number. Bills also include any replacement cost, processing fee, overdue fine, and the patron account balance.
- **Fine notices** - Fee reason, author, title, call number, check-out date, amount, patron's account balance, patron's last activity date.

Note:

If the charge is not linked to any item, the item data fields are blank.

- **Request pick-up notices** - Item title, author, material type, barcode, date held, held until date (unclaimed date), pickup branch ID, pickup branch name.
- **Request cancellation notices** - Item title; item author; item material type (item-level request only); item barcode (item-level request only); request creation date; cancellation reason.

Tip:

If the patron record is set to receive notices by e-mail, print, or text message, or if the notice type is set for e-mail or print only, these notices are sent as designated and are not exported.

The vendor determines the notice text.

Your library may have a contract to use TALKINGtech's i-tiva for telephone notification. You can export overdue, fine, request pick-up, and request cancellation notices to i-tiva. TALKINGtech generates the telephone notices and sends an update back to Polaris via SIP (Standard Interchange Protocol), which updates the patrons' notification history. If a telephone notice fails, Polaris sends the notice in print. Polaris supports TALKINGtech's Format B and Format C. Format B is the default setting. If your library uses Format C and you upgrade Polaris, you must specify Format C with a command line parameter in the Notice Processing Job. Contact your Polaris Site Manager for assistance.

Notification Language

If you have purchased the appropriate licenses for Polaris PowerPAC, you can send print and e-mail notices in English and the licensed languages. Multilingual phone notification is available by separate license. Once set up, a patron receives notices in the licensed language if the **Language** field in the Patron Registration workform is set to that language.

If a multilingual license is purchased, the option is available at the system, library, and branch levels. Because branches can determine a notification library for each notice type, a notice may be generated for any patron from nearly any branch (see [“The Notification Library”](#) on page 400). If the patron designates a preference for notices in Spanish, for example, the patron might receive some notices in Spanish and others in English depending on how the notification library option is set. For example, if the option is set to **Lending branch**, some branches may have enabled Spanish notices and others not. If the notifying library has enabled Spanish notices, the notice is sent in Spanish. For system-wide consistent results, you will need to coordinate branch settings.

Polaris versions 3.6 and later provide default English and multilingual text (if licensed) and support that text in the standard formats. However, if you are upgrading from a version of Polaris earlier than 3.6, you use customized notices, and you are implementing multilingual notification, you will need to check and maintain your customized text and formats.

Notes:

Language options do not apply to exported notices.

Text messaging does not support Unicode, so text message notices in languages with diacritics are not rendered accurately.

Customizing Notice Text with Polaris WebAdmin (Language Editor)

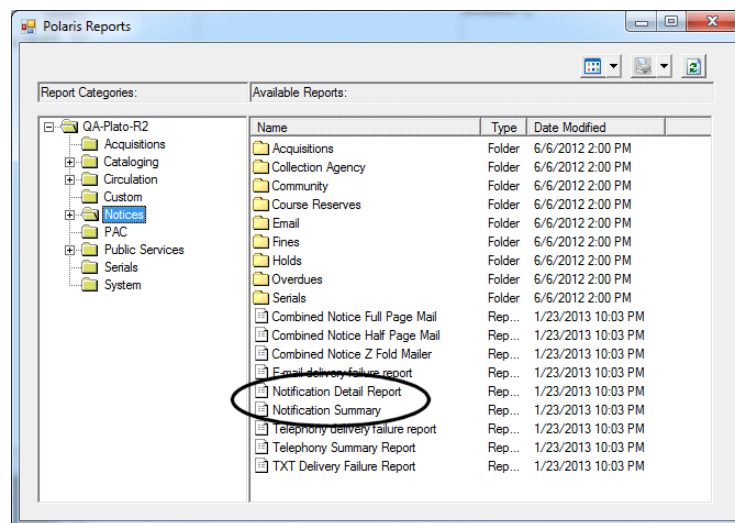
You can customize the text of both English and multilingual notices in Polaris WebAdmin (Language Editor.) You can add or customize language strings at the system, library, and branch levels. Branch settings override library settings; settings made at the library level override system-level settings.

You need the Polaris permission **WebAdmin access: Allow** to use the WebAdmin. In Polaris Administration, this permission is available at the system level under the System Administration security node. For more information about setting Polaris permissions, see [“Granting Permissions”](#) in the *Polaris Administration Guide 4.1R2*.

To access WebAdmin, open your browser and navigate to the site where WebAdmin is installed. You must supply your Polaris username, password, and domain to log in to WebAdmin. For detailed information about using the Language Editor, select the WebAdmin **Help** tab.

Notification Statistical Reports

Polaris offers two reports that track notification statistics – the Notification Summary and the Notification Detail Report. To access these reports, select **Utilities, Reports and Notices** on the Polaris Shortcut Bar, and select the **Notices** folder.



The reports offer statistics for print, e-mail, and phone notices by language, and summarize and compare statistics across three fiscal years.

Notification Summary Report

This report summarizes the total number of print, e-mail, and phone notices produced by fiscal year and notification language, and provides comparative statistics for the two previous fiscal years. The report also includes a summary total of all notices produced by language. Success and failure statistics are included for e-mail and telephone notices as well. You can filter this report by branch, and set the fiscal year by ending month. (Because telephone notices run at the server level, they are not included if you choose to filter the report by a branch.)

Notification Detail Report

This report provides detailed statistics on the number of notices produced by notification method and notice type, each with a separate count by language. You can filter this report by branch, and set the fiscal year by ending month. (Because telephone notices run at the server level, they are not included if you choose to filter the report by a branch.)

Note:

In the Notification Detail Report, combined notice statistics are reported as individual notice types. For example, a combined notice that includes an overdue notice and a hold request pick-up notice is reported twice - once as an overdue notice and once as a hold request pick-up notice.

1-2-3

Set up notification methods, e-mail options, and export location

Follow these steps to set up general notification options.

1. In the Administration Explorer tree view, select **Parameters** for the organization, and click the **Notification** tab in the details view.
2. Double-click **Notification options**.

The Notification Options dialog box - General tabbed page opens.

3. In the **Notification method** area, select *all* the methods that this organization might use to deliver notices. Then make these additional settings as appropriate:
 - Select (check) **Available in PAC** for each method that patrons should be able to choose when self-registering or updating account preferences from PAC.
 - (System level only.) Select **Print** and **Export** if you export notices for print delivery. Select **Phone** and **Export** if you export notices for telephone notification.

The method settings determine which delivery options are available for selection for specific types of notices.

Note:

At the system, library, or branch level you can designate a specific method for each type of notice when you set up the specific notices. If you plan to designate **Patron Preference** as a notification method, or **Supplier Preference** for serial claim notices, be sure to select the possible preference options in this list. See ["Notice Delivery Methods"](#) on page 403. If you export print or telephone notices to an outside vendor, each branch must set the notification method to **Print** for all exported notice types if all branches' notices should be exported.

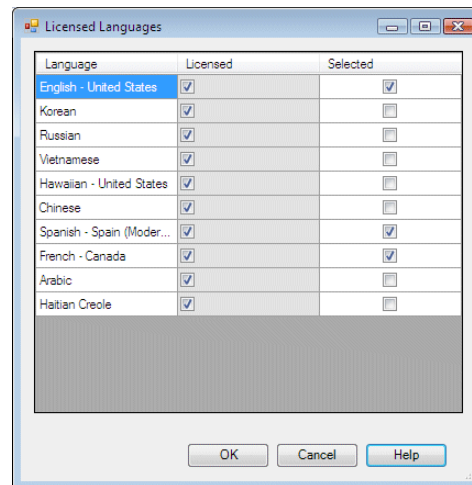
4. Follow these steps to select the languages in which to send notices:

Note:

Multi-lingual notices are a separately licensed feature. See “[Notification Language](#)” on page 406. When you enable multi-lingual notices here, patrons can also select a preferred language for notification when they register from the PAC; once registered, they can change their language preference from the patron account page (**Change Preferences** option). Not all languages are available for telephone notification. Text messaging does not support Unicode, so notices in languages with diacritics are not rendered accurately.

- a) Click the **Languages** link.

The Licensed Languages dialog box opens.



- b) Select (check) the languages in which you will send notices, and click **OK**.

Note:

The read-only **Licensed** column shows which languages are licensed for your system. If notice translations are not available for a licensed language and you need notification in that language, contact your Polaris Site Manager.

5. If this organization sends any type of e-mail notices, set the following options in the **E-mail notice** area:
- **From** - Type the library e-mail address that should appear in the From field of the e-mail notice.
 - **Reply-to** - Type the library e-mail address that should appear in the Reply to field of the e-mail notice.
 - **E-mail address to use** - To use only the primary e-mail address specified in the patron record, select **Use E-mail address only**. To send the notice to both the patron's primary e-mail address and an alternate e-mail address, if any is specified in the patron record, select **Use both E-mail and Alt E-mail**.

Tip:

The summary report is also available from the Report Manager. Select **Utilities, Reports and Notices** on the Polaris Shortcut Bar to open the Report Manager. In the Report Manager, select **Notices, Email, Email_SummaryReport**.

6. For e-mail notices, if you want Polaris to send the notice processing report to a staff member, set these options:
 - Select (check) **Send report for e-mail notice processing**.
 - In the box below the report option, type the e-mail address of the staff member who should receive the report. You can type more than one e-mail address, separating the addresses with a semicolon (;). The maximum number of characters is 255.
7. (System level only) If you have a contract with an outside vendor to send print notices, supply information in the following **Print Export** fields:
 - **FTP Server URI** - Type the full Internet address of the vendor's FTP server. Your exported notice file will be sent to this address.
 - **Logon Name** - Type the logon name for the vendor's FTP server.
 - **Password** - Type the password for the vendor's FTP server.
 - **Save a local copy** - Select this option to save a copy of exported notices. When this option is selected, the copy is automatically saved on the Polaris server to
C:\ProgramData\Polaris\[version]\Logs\EXPORTNOTICES\Reports

Note:
 Local copies are not automatically deleted. You may want to purge them periodically.

If you leave this option unchecked, the notice file is saved in
C:\ProgramData\Polaris\[version]\Temp on the Polaris server for FTP transmission.
8. (System level only) If you have a contract with an outside vendor to send phone notices, supply information in the following **Phone Export** fields:
 - **FTP Server URI** - Type the full Internet address of the vendor's FTP server. Your exported notice file will be sent to this address.
 - **Logon Name** - Type the logon name for the vendor's FTP server.
 - **Password** - Type the password for the vendor's FTP server.
 - **Save a local copy** - Select this option to save a copy of exported notices. When this option is selected, the copy is automatically saved on the Polaris server to
C:\ProgramData\Polaris\[version]\Logs\EXPORTNOTICES\Reports

Note:
 Local copies are not automatically deleted. You may want to purge them periodically.

If you leave this option unchecked, the notice file is saved in
C:\ProgramData\Polaris\[version]\Temp on the Polaris server for FTP transmission.

Note:
 If you export print notices to one vendor and phone notices to a different vendor, you can specify different **Export** settings for each method.

9. Click **Save** to save your settings and close the Notification options dialog box, or select another tab to set up a specific notice type. See the following topics:
 - [“Overdue Notices, Bills, and Combined Notices”](#) on page 413
 - [“Fine Notices”](#) on page 428
 - [“Request Pick-Up, Second Pick-Up, & Cancelled Request Notices”](#) on page 421
 - [“Reminder Notices”](#) on page 432
 - [“Setting Up Routing”](#) in the *Polaris Serials Guide 4.1R2*
 - [“Setting Up Serials Claiming”](#) in the *Polaris Serials Guide 4.1R2*

Related Information

- **Generating printed notices** - See [“Printing Notices”](#) on page 435.
- **Generating e-mail notices** - See [“Delivering Notices By E-mail”](#) on page 442.
- **Setting up text message notices** - See [“Delivering Notices by Text Message”](#) on page 445.
- **Telephone notification** - See [“Delivering Notices by Phone \(Outbound Telephony\)”](#) in the *Polaris Telephony Administration Guide 4.1*.

Overdue Notices, Bills, and Combined Notices

Polaris provides up to three scheduled overdue notices for a patron, followed by an optional bill. You can also choose to combine notices for patrons due to receive more than one type.

Overdue Notices

You can send up to three overdue notices, scheduling the interval between them. Each overdue interval is measured from the date and time the item status changed to overdue, not from the date and time that the previous notice was sent. An item qualifies for inclusion in an overdue notice when the number of days specified in the interval setting added to the due date of the item falls before midnight on the processing date. If an item has qualified for overdue notice processing, but is returned before the notice is sent, the item is removed from notice processing.

Overdue notices can be delivered through the mail as print notices, by e-mail, by phone, or as text messages to mobile phones. Print and e-mail overdue notices include the following information:

Note:

Text messages must be brief. The default text message for overdue notices, which can be edited in Polaris Language Editor, is **Library items are overdue. Please call the library or check your account online.**

- **Library return address** - Taken from the **Return** address field in the notification branch's organization record. If no return address is specified, the notice uses the organization's **Primary** address. For full-page and Z-fold printed notices, the notification branch's primary phone number is also included.
- **Date** - Date the notice was generated
- **Printed notice text** - Polaris supplies default text for the header and introductory paragraph, which you can edit in Polaris WebAdmin (Language Editor). See ["Customizing Notice Text with Polaris WebAdmin \(Language Editor\)"](#) on page 406.
- **E-mail notice text** - Polaris supplies default text for the subject line and introductory paragraph, which you can edit in Polaris WebAdmin (Language Editor). See ["Customizing Notice Text with Polaris WebAdmin \(Language Editor\)"](#) on page 406.
- **System-supplied list of overdue items** - Items are sorted first by notice number (1st, 2nd, 3rd), next in title order. Call numbers are truncated to 60 characters.

- **(Optional) Claimed items** - You can include a list of claimed items with their status (Claim Never Had, Claim Returned).

When overdue notices are generated, the date is recorded in the appropriate item records, the notices are posted in the transaction file, the patron notification history is updated, and the notice queue is cleared.

Bills

You can follow up overdue notices with a bill. Bills are scheduled for processing at a standard interval from the date and time the item status changed to overdue, *not* from the date and time that the last overdue notice was sent (see [“Overdue Notices”](#) on page 413). An item qualifies for inclusion in a bill when the number of days specified in the interval setting added to the due date of the item falls before midnight on the processing date. If an item has qualified for bill processing but is returned before the notice is sent, the item is removed from notice processing. Bills may include overdue charges and replacement fees. Settings for free days are not used in the overdue fine calculation, but closed days and dates are included. For more information about replacement fees, see [“Setting Replacement Fee Defaults”](#) on page 241.

Bills can be delivered as print, e-mail, or text message notices. Print and e-mail bills include the following information:

Note:

Text messages must be brief. The default text message for bills, which can be edited in Polaris WebAdmin (Language Editor), is **Money is owed on your library account. Please call the library or check your account online.**

- **Library return address** - Taken from the **Return** address field in the notification branch’s organization record. If no return address is specified, the notice uses the organization’s **Primary** address. For full-page and Z-fold printed notices, the notification branch’s primary phone number is also included.
- **Date** - Date the notice was generated
- **Printed notice text** - Polaris supplies default text for the header and introductory paragraph, which you can edit in Polaris WebAdmin. See [“Customizing Notice Text with Polaris WebAdmin \(Language Editor\)”](#) on page 406.
- **E-mail notice text** - Polaris supplies default text for the subject line and introductory paragraph, which you can edit in Polaris WebAdmin. See [“Customizing Notice Text with Polaris WebAdmin \(Language Editor\)”](#) on page 406.
- **System-supplied list of items billed** - Each item listing includes the replacement cost and overdue charges, and the total of these for each item. Call numbers are truncated to 60 characters.
- **System-supplied total amount billed** - Total amount due for the bill.

Note:

If you set overdue notice processing to include claimed items, the bill also includes claimed items. See [“Overdue Notices”](#) on page 413.

Bills are generated as part of overdue notice processing. When the bills are generated, the date is recorded in the appropriate item records, the notices are posted in the transaction file, the patron notification history is updated, and the notice queue is cleared. If the system-level Patron Services setting **Overdues: billed items set to lost** (**Lost item charge options** parameter) is set to **No**, replacement and overdue charges are written to the patron account, the item status remains Out, the item remains in the patron's Items Out list, and the lost item counter is not incremented. If **Overdues: billed items set to lost** is set to **Yes**, replacement charges are written to the patron account, the item status changes to Lost, the item is removed from the patron's Items Out list, and the lost item counter is incremented. When **Overdues: billed items set to lost** is set to **Yes**, a separate setting determines whether overdue fines are also written to the patron account. See [“Overdue Fines on Lost Items”](#) on page 243.

Combined Notices

When notification processing identifies a patron as qualifying for more than one type of notice, Polaris can combine overdue, bill, and request notices (in that order), so that a single notice is sent.

To ensure that all notices for a particular patron are included in the combined notice, set the same notification method for each notice type and the combined notice. For example, if the combined notice method is set to **Patron Preference**, set each overdue notice, bill, and hold notice to **Patron Preference**. Otherwise a notice type may not be included in the combined notice. For example, if you set the notification method for bills to **Print** but set other notice types to **Patron Preference**, the bill will be included in the combined notice only if the patron preference happens to be **Print**. In this situation, to ensure that bills will be printed for all patrons who are due for them, you would need to generate the billing notices in addition to the combined notices.

1-2-3

Set up overdue notices, bills, and combined notices

Follow these steps to set up overdue notices, bills, and combined notices.

1. In the Administration Explorer tree view, select **Parameters** for the organization, and click the **Notification** tab in the details view.
2. Double-click **Notification options**.

The Notification Options dialog box - General tabbed page is displayed. Verify that the possible delivery methods have been specified. See [“Set up notification methods, e-mail options, and export location”](#) on page 409.

3. Click the **Overdue & Bill** tab.

4. Select (check) **Overdue** if you send overdue notices (see [“Overdue Notices”](#) on page 413).
5. In the **Overdue** section, select (check) **Export** if you export overdue notices to an outside vendor for delivery.

This option is available only if **Export** has been selected for a delivery method on the General tabbed page at the system level. See [“Exporting Notices to a Notification Service”](#) on page 405.
6. In the **First overdue** section, set the options for first overdue notices:
 - a) In the **Notice interval** box, type or select the number of days (999 maximum) after an item is declared overdue that the item is added to the queue for the first overdue notice.
 - b) To include claimed items in overdue notice processing, select (check) **Include claimed items**.

c) Select a delivery method in the **Notification Method** box.

You can deliver overdue notices by any of the methods you selected on the General tabbed page. See [“Set up notification methods, e-mail options, and export location”](#) on page 409.

Important:

If you export overdue notices to an outside vendor for print delivery, the notification method must be set to **Print** at the system, library, and branch levels if you want to export the notices from all organizations. If a branch-level method is set to e-mail or phone, the system produces notices according to that method. If the method is set to **Patron Preference**, and the patron's preference is set to **Print**, the notice is exported, but if the patron's preference is e-mail, phone, or text message, that method is used.

d) Select (check) **Send additional TXT message** if you want to send a text message notice to patrons' mobile phones *in addition to* the notification method you selected. A patron will receive the additional text message only if the **Additional TXT notice** option is checked in the patron record, the **TXT** box is checked for **Phone 1**, **Phone 2**, or **Phone 3**, and a carrier is specified for that phone number. If a patron registers or updates account information online through Polaris PowerPAC and supplies a phone number for text messages and a carrier, this option is automatically checked.

If you selected **Patron Preference** in the **Notification Method** box, patrons who have text messaging set as their preferred notification method in the patron record will receive text message notices only.

e) Select the library that should generate the overdue notice in the **Notification library** box.

The notification library is the library responsible for producing and sending the notice. For more information about how this selection determines which patrons and items are identified for overdue notice processing, see [“The Notification Library”](#) on page 400.

f) Set the return address for the notice in the **Return address** box:

- **Use notification library** - This option uses the address specified in the organization record for the notification library.
- **Use optional address** - Select this option to set an address other than the notification library. If you select this option, select the organization whose address should appear on the notice.

Tip:

Select **Use optional address** if your notices are processed and sent from a central location.

Note:

If the notification library is set to **Item's branch** or **Transacting branch**, and the return address is set to **Use notification library**, the return address on the notices is that of the item branch or transacting branch. If you want the return address to be your own, select **Use optional address** and choose your own branch.

7. If you send second overdue notices, set the interval and method in the **Second overdue** section.

To prevent Polaris from generating an overdue notice for a particular overdue level, as well as the overdue levels that follow it, set the overdue level to zero (0). For example, if you do not want to send second and third overdue notices, set the **Notice interval** for the second overdue to 0.

The interval is measured from the point when the item status changed to overdue, not from the first overdue notice. The method and settings can be different from the first overdue notice settings. The notification library, return address, and claimed items settings are the same as the first overdue notice settings.

8. If you send third overdue notices, set the interval and method in the **Third overdue** section.

Note:

If you do not send third overdue notices, set the **Notice interval** for the third overdue to 0.

The interval is measured from the point when the item status changed to overdue, not from the second overdue notice. The method settings can be different from the first and second overdue notice settings. The notification library, return address, and claimed items settings are the same as the first overdue notice settings.

9. If you send bills (see [“Bills”](#) on page 414), select (check) **Bill** and set the following options:
 - a) Select (check) **Export** if you export bills to an outside vendor for delivery. This option is available only if **Export** has been selected for a delivery method on the General tabbed page at the system level. See [“Exporting Notices to a Notification Service”](#) on page 405. Bills cannot be exported for telephone notification.
 - b) In the **Notice interval** box, type or select the number of days (999 maximum) after an item is declared overdue that the item is added to the queue for the billing notice.

Note:

Coordinate this setting with your interval settings for overdue notices.

- c) Select a delivery method in the **Notification Method** box.

You can deliver bills by print, e-mail, or text message if you have selected the method on the General tabbed page. See [“Set up notification methods, e-mail options, and export location”](#) on page 409.

Note:

Bills cannot be delivered by telephone. If you set the method to **Patron Preference** and the patron's preference is set to **Phone** in the patron record, the notice will be printed instead.

Important:

If you export billing notices to an outside vendor for print delivery, the notification method must be set to **Print** at the system, library, and branch levels if you want to export the notices from all organizations. If a branch-level method is set to e-mail, the system produces notices according to that method. If the method is set to **Patron Preference**, and the patron's preference is set to **Print**, the notice is exported, but if the patron's preference is e-mail or text message, that method is used.

- d)** Select (check) **Send additional TXT message** if you want to send a text message notice to patrons' mobile phones *in addition to* the notification method you selected. A patron will receive the additional text message only if the **Additional TXT notice** option is checked in the patron record, the **TXT** box is checked for **Phone 1**, **Phone 2**, or **Phone 3**, and a carrier is specified for that phone number. If a patron registers or updates account information online through Polaris PowerPAC and supplies a phone number for text messages and a carrier, this option is automatically checked.

If you selected **Patron Preference** in the **Notification Method** box, patrons who have text messaging set as their preferred notification method in the patron record will receive text message notices only.

- e)** Select the library to generate the bill in the **Notification library** box.

The notification library is the library responsible for producing and sending the notice. For more information about how this selection affects which patrons and items are identified for bill processing, see [“The Notification Library”](#) on page 400.

- f)** Set the return address for the bill in the **Return address** box:

- **Use notification library** - This option uses the address specified in the organization record for the notification library.
- **Use optional address** - Select this option to set an address other than the notification library. If you select this option, select the organization whose address should appear on the notice.

Tip:

Select **Use optional address** if your notices are processed and sent from a central location.

- 10.** To send combined notices (see [“Combined Notices”](#) on page 415), select (check) **Combine patron notices** and set the delivery method.

You can deliver combined notices by any of the methods you selected on the General tabbed page. See [“Set up notification methods, e-mail options, and export location”](#) on page 409.

Note:

If **Combine patron notices** is not checked, combined e-mail notices are not automatically generated. However, the option is displayed and functions from the Polaris Reports utility.

- 11.** Click **Save** to save your settings and close the Notification options dialog box, or select another tab to set up another notice type.

Related Information

- **Prevent a specific patron from receiving overdue notices** - Select the **Exclude from overdue notice** check box on the Patron Registration workform - General view. See [“Add general data to a patron record”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Prevent a specific patron from receiving bills** - Select **Exclude from billing** on the Patron Registration workform - General view. See [“Add general data to a patron record”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Patron billing statement** - The Patron Billing Statement is a notice that lists all the current charges on a specific patron’s account. You can print this notice for a specific patron or patrons, or on an organization basis, automatically printing a statement of current charges for each patron who owes an amount within a specified range. This notice is intended to help patrons understand exactly what they owe, and does not affect the notices queue in any way. See [“Print patron billing statements”](#) on page 439.
- **Setting circulation blocks** - See [“Defining Circ and Request Limit Blocks”](#) on page 324.
- **Generating printed notices** - See [“Printing Notices”](#) on page 435.
- **Generating e-mail notices** - See [“Delivering Notices By E-mail”](#) on page 442.
- **Setting up text message notices** - See [“Delivering Notices by Text Message”](#) on page 445.
- **Telephone notification** - See [“Delivering Notices by Phone \(Outbound Telephony\)”](#) in the *Polaris Telephony Administration Guide 4.1*.

Request Pick-Up, Second Pick-Up, & Cancelled Request Notices

Polaris offers three types of notices related to hold requests: request pick-up, second pick-up, and cancelled request notices.

Note:

A separate SQL job, **Hold Notice Processing**, processes e-mail and text message (SMS) first and second hold notices separately from print notices and phone notices. Designed to run multiple times per day, the job runs every 4 hours from 9:00 a.m. to 8:00 p.m. by default. See [“Hold Notice Processing for E-Mail and Text Message Notices”](#) on page 404.

Request Pick-Up Notices

Request pick-up notices inform patrons that an item that fills a hold or ILL request is available for pick-up. When an item is trapped for a hold request and the item's circulation status changes to Held, the item is included in request notice processing. The patron who should receive the notice is identified by the link to the request. The notification library for hold request notices is always the pick-up library. If the pick-up library is changed, a new notice is generated when the item status becomes Held at the new pick-up branch. (If the notice has not been generated for the first pick-up location, the first notice is deleted.) ILL items are also included in request pick-up notice processing. When an item record is created for an ILL request, and the circulation status becomes Held, the item is included in the request notice.

Request pick-up notices can be delivered as print notices, e-mail notices, by telephone, or by text message. Print and e-mail request notices include the following information:

Note:

Text messages must be brief. The default text message for request pick-up notices, which can be edited in Polaris Language Editor, is **The item you requested [first 20 characters of title] is available for pickup at branch [branch display name] until [unclaim date]**. One message is sent for each item held. If items are held at more than one branch, the patron will receive a notice from each branch.

- **Library return address** - Taken from the **Return** address field in the pick-up library's organization record. If no return address is specified, the notice uses the organization's **Primary** address.
- **Date** - Date the notice was generated
- **Printed notice text** - Polaris supplies default text for the header and introductory paragraph, which you can edit in Polaris Language Editor. See [“Customizing Notice Text with Polaris WebAdmin \(Language Editor\)”](#) on page 406.

- **E-mail notice text** - Polaris supplies default text for the subject line and introductory paragraph, which you can edit in Polaris WebAdmin (Language Editor). See [“Customizing Notice Text with Polaris WebAdmin \(Language Editor\)”](#) on page 406.
- **System-supplied list of items to pick up** - The items are sorted by title. Each entry includes the title, author, item material type, item barcode, and Held-Till date.

When request notices are generated, the date is recorded in the appropriate item records, the notices are posted in the transaction file, and the notice queue is cleared.

Second Pick-Up Notices

You can follow up a patron's first hold pick-up notice with a second notice, sent after a time interval you specify, for requests that remain with a Held status. The second notice can be sent by print, phone, e-mail, or TXT message. The default text is the same as that defined for the first notice, and can be edited in WebAdmin (Polaris Language Editor).

The notice is sent if the number of days specified is reached and the request status is still Held. If the hold request status becomes Unclaimed after the process to send the second notice runs, the notice will be removed from the notification queue. Your settings also apply to ILL requests, which do not have an Unclaimed status; in this case, the second notice is sent if the item has not been checked out within the specified period.

Note:

There is no program dependency between the notice interval for the 2nd hold notice and your setting for **Number of days held for pickup**, specified in the Requests parameter **Holds options**. If the notice interval is greater than the number of days held for pickup, the notice is never sent, so you may want to coordinate these settings.

When the notice is sent, it appears in the patron's notification history as **2nd hold notice**. The item record also shows the notice date. Status reports such as Delivery Failure reports include the second hold notice with the hold notices. The second hold notice is also included in the total hold notice count for statistical reports.

Note:

Because multiple first and second hold notices may appear in a single print, e-mail, or text message notice, the notification log lists the type for all hold pick-up notices as 2 (regular hold notice request).

For best results with printed notices, the **Holds overnight processing** job should run before the **Notices processing** job.

Note:

A separate SQL job, **Hold Notice Processing**, processes e-mail and text message (SMS) first and second hold notices separately from print notices and phone notices. Designed to run multiple times per day, the job runs every 4 hours from 9:00 a.m. to 8:00 p.m. by default. See [“Hold Notice Processing for E-Mail and Text Message Notices”](#) on page 404.

Cancelled Request Notices

Cancelled request notices are sent when a request status changes from Active, Pending, or Inactive to Cancelled. A request status changes to Cancelled in these circumstances:

- The last item linked to a bibliographic record is deleted
- A purchase order is cancelled
- A request is manually cancelled from the staff client
- A request is cancelled from PAC

However, cancelled request notices are not sent in these circumstances:

- A request status changes from Held to Unclaimed, then changes to Cancelled
- A Held item is checked out to another patron, and the original request is not reactivated
- A staff member is prompted to hold an item to fill a request but declines to fill the request with that item, and chooses not to reactivate the request
- An item is checked out to a patron who has a request for it, and the request status is still Pending. The request is automatically cancelled because the patron has the item.
- A request is accidentally cancelled, then reactivated for the same patron before notice processing

Notices for Integrated Ebook Requests

If your library offers PAC users integrated econtent such as 3M ebooks, patrons may request ebooks and cancel their requests from the PAC. Notices for “held” ebooks (requests available for checkout) and cancelled requests are available for ebooks. These notices can be sent via e-mail, TXT message, or patron preference if the preference is one of these methods.

Note:

Second pick-up notices are not available for ebooks.

When ebook request notices are enabled, the patron receives a notice when a requested ebook is available for checkout and download. Request notices are sent when the request is placed in PAC and when the request is placed in the 3M Cloud application. The subject line and notice text can be edited in Polaris WebAdmin; the Notice “product” language strings are **NOTICE_EBOOKREQAVAILSUB** (subject line) and **NOTICE_EBOOKREQAVAILBODY** (notice text).

The same text defined in WebAdmin is used for both e-mail and TXT notices. Text can be defined for the hold notice and the hold cancel notice, but the text defined for the notice will be used in both the email and TXT notification messages. Because of the character limit for TXT messages, the text of the notification is kept to a minimum.

When cancelled ebook request notices are enabled, the patron receives a notice when he or she cancels the request from the PAC patron account. When the patron cancels multiple requests in one action, these notices are combined in one e-mail notice. TXT notices are sent separately due to message length restrictions. (If the patron cancels a request from the 3M Cloud application, no notice is sent.) The subject line and notice text can be edited in WebAdmin; the PowerPAC “product” language strings are **PACML_EBOOKCANELSUBJ** (subject line) and **PACML_EBOOKCANCEL** (notice text).

The notices are sent close to the time of the action taken in PAC, according to the settings of the patron’s branch. Request and request cancel notices appear in the patron’s notification history. The notices are logged with other notice types, and failures are reported in the e-mail and TXT failure reports.

1-2-3

Set up request pick-up, second pick-up, & cancelled request notices

These notices are sent according to the settings of the request’s pick-up library. Follow these steps to set up hold request pick-up notices and cancelled request notices.

1. In the Administration Explorer tree view, select **Parameters** for the organization, and click the **Notification** tab in the details view.
2. Double-click **Notification options**.

The Notification Options dialog box - General tabbed page is displayed. Verify that the possible delivery methods have been specified. See [“Set up notification methods, e-mail options, and export location”](#) on page 409.

3. Click the **Hold Request & Cancellation** tab.

The screenshot shows the 'Notification options' dialog box with the 'General' tab selected. The dialog has several sections for configuring notifications:

- Request:** A checked checkbox. Below it, 'Notification method' is set to 'Patron preference' and 'Send additional TXT message' is unchecked.
- 2nd hold notice:** An unchecked checkbox. Below it, 'Notification method' is set to 'Patron preference', 'Send additional TXT message' is unchecked, and 'Notice interval (days)' is set to 3.
- Cancelled request:** A checked checkbox. Below it, 'Notification method' is set to 'Patron preference' and 'Send additional TXT message' is unchecked.
- Ebook request:** An unchecked checkbox. Below it, 'Notification method' is set to 'E-mail'.
- Cancelled ebook request:** An unchecked checkbox. Below it, 'Notification method' is set to 'E-mail'.

At the bottom of the dialog are buttons for 'Save', 'Cancel', 'Apply', and 'Help'.

4. To enable request pick-up notices, follow these steps:

- a) Select (check) **Request**.
- b) Select (check) **Export** if you export request notices to an outside vendor for delivery. This option is available only if **Export** has been selected for a delivery method on the General tabbed page at the system level. See [“Exporting Notices to a Notification Service”](#) on page 405.

Important:

If you export request notices to an outside vendor for print delivery, the notification method must be set to **Print** at the system, library, and branch levels to export the notices from all organizations. If a branch-level method is set to e-mail or phone, the system produces notices according to that method. If the method is set to **Patron Preference**, and the patron's preference is set to **Print**, the notice is exported, but if the patron's preference is e-mail, phone, or text message, that method is used.

- c) Select a delivery method in the **Notification Method** box.

You can deliver request notices by any of the methods you selected on the General tabbed page. See [“Set up notification methods, e-mail options, and export location”](#) on page 409.

- d) Select (check) **Send additional TXT message** if you want to send a text message notice to patrons' mobile phones *in addition to* the notification method you selected. A patron will receive the additional text message only if the **Additional TXT notice** option is checked in the patron record, the **TXT** box is checked for **Phone 1**, **Phone 2**, or **Phone 3**, and a carrier is specified for that phone number. If a patron registers or updates account information online through Polaris PowerPAC and supplies a phone number for text messages and a carrier, this option is automatically checked.

If you selected **Patron Preference** in the **Notification Method** box, patrons who have text messaging set as their preferred notification method in the patron record will receive text message notices only.

5. To enable second pick-up notices, follow these steps:

- a) Select (check) **2nd hold notice**.
- b) Select the delivery method.

You can deliver request notices by any of the methods you selected on the General tabbed page. See [“Set up notification methods, e-mail options, and export location”](#) on page 409. The default setting is **Patron Preference**.

Note:

If you export the regular hold request notice to a third-party service, the second hold notice is also exported.

- c) Select (check) **Send additional TXT message** if you want to send a text message notice to patrons' mobile phones *in addition to* the notification method you selected.

- d) Set the **Notice Interval** for the number of days to wait from the date the request became Held before sending the second notice. The count includes the date held. For example, if the item was Held on the 1st of the month and the interval is set to 3 days (the default), the notice is sent on the 3rd. See [“Second Pick-Up Notices”](#) on page 422 for more details about second request processing.

- 6. To enable cancelled request notices, follow these steps:

Note:

If you export request pick-up notices, and enable cancelled request notices, these are also exported.

- a) Select a delivery method in the **Notification Method** box.

You can deliver cancelled request notices by any of the methods you selected on the General tabbed page. See [“Set up notification methods, e-mail options, and export location”](#) on page 409.

- b) Select (check) **Send additional TXT message** if you want to send a text message notice to patrons’ mobile phones *in addition to* the notification method you selected. A patron will receive the additional text message only if the **Additional TXT notice** option is checked in the patron record, the **TXT** box is checked for **Phone 1**, **Phone 2**, or **Phone 3**, and a carrier is specified for that phone number. If a patron registers or updates account information online through Polaris PowerPAC and supplies a phone number for text messages and a carrier, this option is automatically checked.

If you selected **Patron Preference** in the **Notification Method** box, patrons who have text messaging set as their preferred notification method in the patron record will receive text message notices only.

- 7. To enable ebook hold notices, select (check) **Ebook request**, and select a notification method (e-mail, TXT, or both). See [“Notices for Integrated Ebook Requests”](#) on page 423.

Note:

If you select **Both** for the method, the notice is sent either by e-mail or TXT message, depending on the patron’s notification preference. If the patron has not selected either option as a preference, the patron will not receive notification.

- 8. To enable notices for cancelled ebook requests, select (check) **Cancelled ebook request**, and select a notification method. See [“Notices for Integrated Ebook Requests”](#) on page 423.

Note:

If you select **Both** for the method, the notice is sent either by e-mail or TXT message, depending on the patron’s notification preference. If the patron has not selected either option as a preference, the patron will not receive notification.

- 9. Click **Save** to save your settings and close the Notification options dialog box, or select another tab to set up another notice type.

Related Information

- **Prevent a specific patron from receiving request notices** - Select the **Exclude from hold notice** check box on the Patron Registration workform - General view. See [“Add general data to a patron record”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Setting up requests processing** - See [“Setting Up Holds and ILL Request Processing”](#) on page 277.
- **Processing requests** - See [“Working with Hold Requests”](#) in the *Polaris Patron Services Guide 4.1R2* and [“Working with Interlibrary Loans”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Generating printed notices** - See [“Printing Notices”](#) on page 435.
- **Generating e-mail notices** - See [“Delivering Notices By E-mail”](#) on page 442.
- **Setting up text message notices** - See [“Delivering Notices by Text Message”](#) on page 445.
- **Telephone notification** - See [“Delivering Notices by Phone \(Outbound Telephony\)”](#) in the *Polaris Telephony Administration Guide 4.1*.

Fine Notices

Fine notices, sometimes called collection notices, are optional. They are typically sent to patrons to warn them that their account will be referred to a collection agency within a certain period of time. A patron receives a fine notice when the amount owed exceeds a specified amount, excluding fines defined as recent. (Patrons whose accounts are already in collection do not receive fine notices.) The criteria for fine notices are independent of the criteria you specify for overdue and billing notices, although a patron typically receives several overdue notices and bills before receiving a fine notice. Patrons receive only one fine notice, but they may continue to receive overdue notices or bills.

If you use a collection agency that does not send an initial warning notice to patrons, you may want to set up fine notices. However, if you use a collection agency that handles the initial patron notification for collection, such as UMS, you may not want to send your own fine notices. You can also send fine notices even if you do not use collection agency services, specifying your own message for the notice.

Fine notices can be delivered as print notices, e-mail notices, or text messages. When fine notices are generated, the notices are posted in the transaction file, and the notice queue is cleared.

1-2-3

Set up fine notices

Follow these steps to set up fine notices.

1. In the Administration Explorer tree view, select **Parameters** for the organization, and click the **Notification** tab in the details view.
2. Double-click **Notification options**.

The Notification Options dialog box - General tabbed page is displayed. Verify that the possible delivery methods have been specified. See [“Set up notification methods, e-mail options, and export location”](#) on page 409.

3. Click the **Fine** tab.

The screenshot shows the 'Notification options' dialog box with the 'Fine' tab selected. The 'Fine' checkbox is checked. The 'Notification method' is set to 'Patron preference'. The 'Notification library' is set to 'Patron's branch'. The 'Return address' is set to 'Use notification lib'. The 'User defined field for Guardian' is set to '<None>'. The 'Minimum balance (\$)' is set to '\$50.00'. The 'Fine age (days)' is set to '1'. There is an 'Export' checkbox which is unchecked. A note at the bottom states: '***Note: If fine notices are used in conjunction with collection agency functionality, the Fine age value entered here should be less than the corresponding value specified for collection agency reporting in order to ensure that the patron receives the fine notice before being reported.'

4. To enable fine notices, select (check) **Fine**.
5. Select (check) **Export** if you export fine notices to an outside vendor for delivery. This option is available only if **Export** has been selected for a delivery method on the General tabbed page at the system level. See [“Exporting Notices to a Notification Service”](#) on page 405.

Important:

If you export fine notices to an outside vendor for print delivery, the notification method must be set to **Print** at the system, library, and branch levels if you want to export the notices from all organizations. If a branch-level method is set to e-mail, the system produces notices according to that method. If the method is set to **Patron Preference**, and the patron's preference is set to **Print**, the notice is exported, but if the patron's preference is e-mail or text message, that method is used. Fine notices cannot be delivered by phone.

6. Select a delivery method in the **Notification Method** box.

You can deliver fine notices by any of the methods you selected on the General tabbed page except phone. See [“Set up notification methods, e-mail options, and export location”](#) on page 409.

Note:

Fine notices cannot be delivered by telephone. If you set the method to **Patron Preference** and the patron’s preference is set to **Phone** in the patron record, the notice will be printed instead.

7. Select (check) **Send additional TXT message** if you want to send a text message notice to patrons’ mobile phones *in addition to* the notification method you selected. A patron will receive the additional text message only if the **Additional TXT notice** option is checked in the patron record, the **TXT** box is checked for **Phone 1**, **Phone 2**, or **Phone 3**, and a carrier is specified for that phone number. If a patron registers or updates account information online through Polaris PowerPAC and supplies a phone number for text messages and a carrier, this option is automatically checked.

If you selected **Patron Preference** in the **Notification Method** box, patrons who have text messaging set as their preferred notification method in the patron record will receive text message notices only.

8. Select the library that should generate the fine notice in the **Notification library** box.

The notification library is the library responsible for producing and sending the notice. For more information about how this selection affects which patrons and items are identified for fine processing, see [“The Notification Library”](#) on page 400.

9. Set the return address for the notice in the **Return address** box:
 - **Use notification library** - This option uses the address specified in the organization record for the notification library.
 - **Use optional address** - Select this option to set an address other than the notification library. If you select this option, select the organization whose address should appear on the notice.

Tip:

Select **Use optional address** if your notices are processed and sent from a central location.

10. (Optional) Specify which user-defined field (UDF) to use for guardian (for patrons under the age of 18). See [“Reporting Minors”](#) on page 262.

If you specify a guardian UDF, the fine notice regarding the minor’s delinquent account is sent to the minor in care of the guardian, at the guardian’s address.

Note:

If your library does not use a UDF for guardian barcode, or if no guardian can be determined, the notice is sent to the minor patron.

Tip:

Set this value to one equal or greater than the **Second Level Fine** amount set in the Patron and Material Loan Limit table. See [“Defining Loan and Request Limit Blocks”](#) in the *Polaris Patron Services Administration Guide 4.1R2*.

- 11.** In the **Minimum balance** box, type the amount owed that a patron must exceed to receive a fine notice.

For example, if the minimum balance is set at \$50.00, a fine notice is generated when the patron owes more than \$50.00.
- 12.** In the **Fine age (days)** box, specify the number of days old a fine must be to be included in the balance that triggers the fine notice.

Example:

The **Minimum Balance** is set to \$25.00 and the **Fine Age** is set to 10 days. If the patron’s fines still exceed \$25.00 10 days after the latest fine is incurred, the patron receives a fine notice.

If you use collection agency services, be sure the **Fine age (days)** setting is *less* than the fine age setting for sending an account to collection. This will ensure that the patron receives the notice before the account is sent to collection. See [“Using a Collection Agency”](#) on page 260.

- 13.** Click **Save** to save your settings and close the Notification options dialog box, or select another tab to set up another notice type.

Related Information

- **Collection agency services** - See [“Managing Collection Agency Services”](#) on page 259.
- **Patron billing statement** - The Patron Billing Statement is a notice that lists all the current charges on a specific patron’s account. You can print this notice for a specific patron or patrons, or on an organization basis, automatically printing a statement of current charges for each patron who owes an amount within a specified range. This notice is intended to help patrons understand exactly what they owe, and does not affect the notices queue in any way. See [“Print patron billing statements”](#) on page 439.
- **Generating printed notices** - See [“Printing Notices”](#) on page 435.
- **Generating e-mail notices** - See [“Delivering Notices By E-mail”](#) on page 442.
- **Setting up text message notices** - See [“Delivering Notices by Text Message”](#) on page 445.
- **Telephone notification** - See [“Delivering Notices by Phone \(Outbound Telephony\)”](#) in the *Polaris Telephony Administration Guide 4.1*.

Reminder Notices

You can send e-mail reminder notices to any qualifying patrons with a valid e-mail address, regardless of the patrons' preferred notification method, and optionally send an additional text message. The following e-mail reminder notices are available:

- **Almost overdue notice** - A notice is sent a specified number of days before a patron's item becomes overdue. The notice also lists other items that the patron currently has checked out. Polaris supplies the item title, due date, format, check-out branch, and number of renewals left for each item. When an "almost overdue" reminder notice is sent regarding an item, the date is recorded in the item record.
- **Patron record expiration notice** - A notice is sent a specified number of days before a patron's registration expires. The notice alerts the patron to contact the library. Polaris supplies the patron's home address, telephone number, and e-mail address for verification.
- **Inactive patron notice** - A notice is sent to a patron whose account has had no activity for a specified number of days. The notice advises the patron to visit the library or call to update the patron's registration. Polaris supplies the patron's home address, telephone number, and e-mail address for verification.

Note:

The **Last Activity Date** field in the patron record tracks patron activity. It is updated in the following circumstances. *Staff client*: item check-out; renewal; quick-circ item check-out; a claim is made on an item. *PAC*: log-in to patron account; placing and modifying hold and ILL requests; online renewal; patron information updates; payments; access to remote databases that require log-in. *Polaris ExpressCheck, SIP self-check units*: check-out and renewal; patron account access; payments. *Time and print management applications*: log-in. *Inbound telephony*: Access account information and renew items.

Reminders, including the almost overdue notice, are sent according to the settings for the patron's registered branch (not the item's assigned branch or the loaning branch).

Reminder notices are sent only once. The notice processing program runs daily so that reminder notices are not re-sent to the same patrons. You can modify the subject line and introductory text of all reminder notices using Polaris WebAdmin (Language Editor). See ["Customizing Notice Text with Polaris WebAdmin \(Language Editor\)"](#) on page 406.

Reminder notices are not exported to outside vendors.

1-2-3

Set up e-mail reminder notices

Follow these steps to set up e-mail reminder notices.

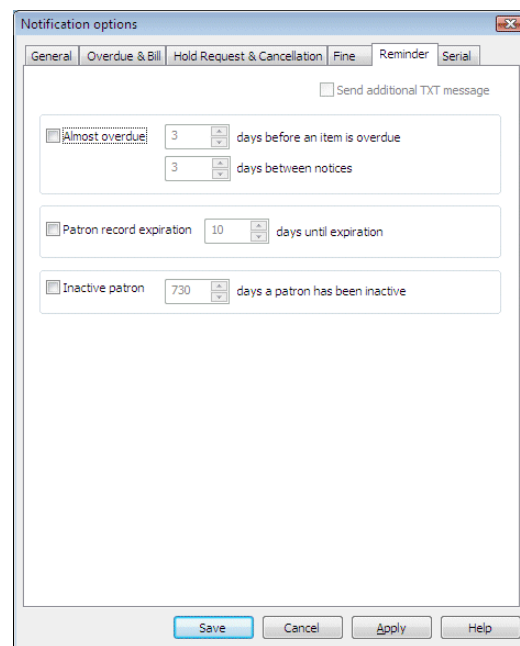
Note:

For reminder notices, the notification library is always the patron's registered branch.

1. In the Administration Explorer tree view, select **Parameters** for the organization, and click the **Notification** tab in the details view.
2. Double-click **Notification options**.

The Notification Options dialog box - General tabbed page is displayed. Verify that e-mail and text messages (if you will send additional text messages) have been specified as possible delivery methods. See [“Set up notification methods, e-mail options, and export location”](#) on page 409.

3. Click the **Reminder** tab.



4. To send text message reminders in addition to e-mail reminders, select (check) **Send additional TXT message**.

A patron will receive the additional text message only if the **Additional TXT notice** option is checked in the patron record, the **TXT** box is checked for **Phone 1**, **Phone 2**, or **Phone 3**, and a carrier is specified for that phone number. If a patron registers or updates account information online through Polaris PowerPAC and supplies a phone number for text messages and a carrier, this option is automatically checked.

Note:

If you want to enable the additional reminder text message but a specific patron prefers not to receive the additional reminder text messages, clear the **Additional TXT notice** option in the patron record.

5. To set up “almost overdue” notices, follow these steps:
 - a) Select (check) **Almost overdue**.
 - b) Select or type the number of days before an item is overdue that qualifies the patron to receive the notice.
 - c) Select or type the number of days that should elapse between notices. This setting prevents multiple e-mail messages from being sent to the same person over several days.
6. To set up reminder notices for patrons whose accounts are due to expire, follow these steps:
 - a) Select (check) **Patron record expiration**.
 - b) Select or type the number of days before the registration expires that qualifies the patron to receive the notice.
7. To set up reminder notices for patrons whose accounts are inactive, follow these steps:
 - a) Select (check) **Inactive patron**.
 - b) Select or type the elapsed number of days with no account activity that qualifies the patron to receive the notice.
8. Click **Save** to save your settings and close the Notification options dialog box, or select another tab to set up another notice type.

Related Information

- **Special announcements** - Using the Polaris E-Mail Manager, you can send special messages and announcements that are not part of the automated notification process. See [“Send e-mail special announcements”](#) on page 444.
- **Generating e-mail notices** - See [“Delivering Notices By E-mail”](#) on page 442.
- **Setting up text message notices** - See [“Delivering Notices by Text Message”](#) on page 445.

Printing Notices

You can print overdue, bill, fine, and hold request notices at any time from the **Utilities** menu on the Polaris Shortcut Bar. For overdue and fine notices, a nightly process automatically places the notices in the queue for delivery. The queue for hold request notices is built item-by-item as each item's status changes to Held. After you print the notices, if you choose to "post" the notices, data is written to the database records and the appropriate queue is cleared. These printed notices are produced according to the paper format you specify. If a notice lists too many items to fit on a single form, a second form is generated for the same patron, using the same header text and listing the remaining items. (The Post Card format does not contain specific item information.) The notices are sent to the address in the **Address for notices and bills** field in the patron record (Patron Registration workform - Addresses view). See ["Print overdue, bill, fine, or request notices"](#) on page 435.

You can also print Patron Billing Statements, which list all the current charges on a specific patron's account. You can print these notices for a specific patron or patrons, or on an organization basis, automatically printing a statement of current charges for each patron who owes an amount within a specified range. This statement is intended to help patrons understand exactly what they owe, and does not affect the notices queue in any way. Like other printed notices, Patron Billing Statements are sent to the address in the **Address for notices and bills** field in the patron record. See ["Print patron billing statements"](#) on page 439.

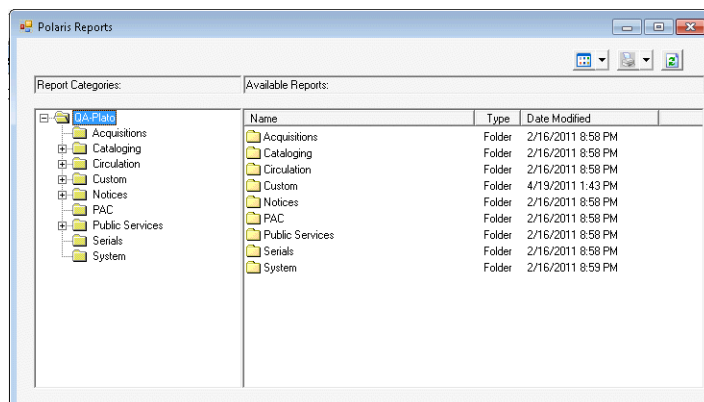
1-2-3

Print overdue, bill, fine, or request notices

Follow these steps to print overdue, bill, fine, or hold request notices.

1. Select **Utilities, Reports and Notices** on the Polaris Shortcut Bar (staff client).

The Polaris Reports dialog box appears.



2. Expand the **Notices** folder.
3. Select the **Overdues**, **Holds**, or **Fines** folder under **Notices**.

The appropriate notices are displayed in the **Available Reports** list.

Note:

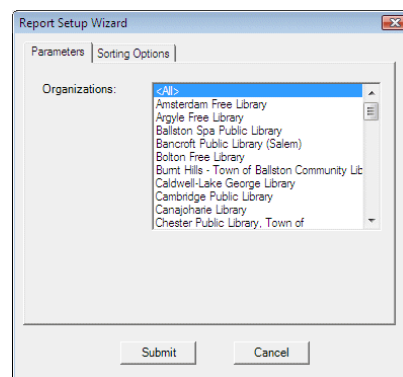
Mailers in various formats for combined notices are listed individually under **Notices**. Bills are available in the **Overdues** folder.

4. Double-click the notice format you want to print:
 - **Full Page Mailer** - 8.5 x 11 inches
 - **Half Page Mailer** - 9 x 5.5 inches, commonly available half-page mailer stock
 - **Post Card** - 6 x 4 inches
 - **Z Fold Mailer** - 8.5 x 11 inches, folds so addresses are exposed in window envelope
 - **Z Fold Mailer Oversized** - 8.5 x 14 inches, folds so addresses are exposed in window envelope

Note:

Printed notices designed to be inserted in an envelope are formatted for standard #10 window envelopes.

The Report Setup Wizard appears.

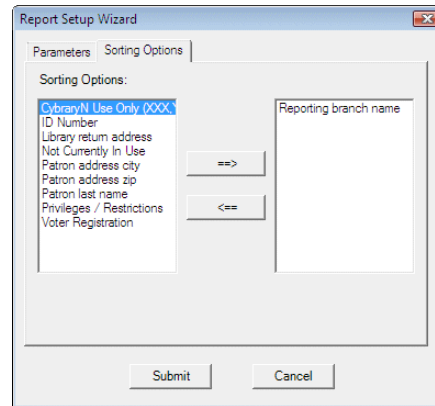


5. Select the organization(s) whose notices you want to run.

Note:

The organizations available for selection are set in the **Report server** profile. For more information, see ["Specify a server for Reporting Services"](#) in the *Polaris Administration Guide 4.1R2*.

6. Click the **Sorting Options** tab.

**Note:**

Your system's user-defined fields for patron records are included in the sorting options.

7. Select a sorting order in the list on the left, and click the right arrow button.

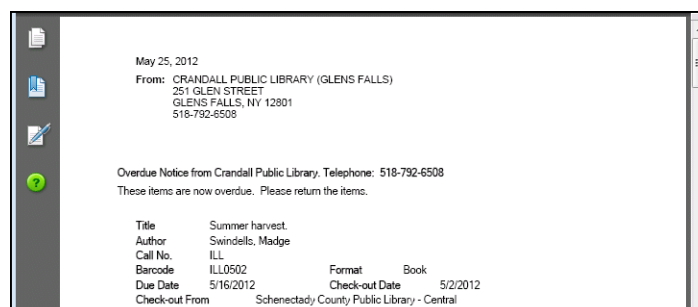
The field is moved to the list on the right, indicating that it is selected for sorting. You can select more than one field. The notices will be printed sorted by the first field, and within the first field by the second field, and within the second field by the third field.

The reporting branch name is selected by default. If your library or system does not do central notice processing, you may want to leave this option in place. You can select additional sorting fields. If you do central processing, you may want to move **Reporting branch name** to the left (unselected) list, and instead select a more useful primary sort for mailing—for example, **Patron address zip**. You must select at least one sorting option.

To remove a field from the selected list on the right, select the field and click the left arrow button.

8. Click **Submit**.

After a few moments, the notices are generated and the Report Preview window opens.



A message asks if you want to post the notices to the database.

9. Choose one of the following options:

- Move the message box to one side and decide whether to post after you print the notices.
- If you are satisfied with the notices in the preview, click **Yes**.

Important:

When you click **Yes**, the notices are posted (recorded) as issued, and the appropriate queue for the notice type and branch you chose is cleared. However, the set of notices remains available in your workstation's **My Documents/My Reports** folder, and can be reprinted from that location. The file is overwritten each time notices are generated.

- If you see problems, click **No**. This option allows you to start over, without posting or printing the notices.

Note:

You can click the arrows at the bottom of the Report Preview window to see the notices one by one. Or, click the **Pages** tab to see several notices at once.

Tip:

You can print a limited range of pages to test the notices. Note that by design, title and author information is limited to 100 characters on all notices.

10. Click the printer icon to print the notices.

The Print dialog box appears.

11. Modify the printer settings, if necessary, and click **OK**.

The notices are printed.

Note:

If you are printing both English and other language notices, they are interfiled.

12. Close the Report Preview window.

Related Information

- **Printing Chinese, Japanese, or Korean notices** - If Chinese, Japanese, or Korean notices are printing incorrectly, you may need to install a different printer driver. Check your printer documentation for more information.
- **Printing Acquisitions notices** - See [“Canceling Orders”](#) in the *Polaris Acquisitions Guide 4.1R2* and [“Claiming”](#) in the *Polaris Acquisitions Guide 4.1R2*.
- **Printing Collection Agency Synchronization Report** - See [“Collection Processing Reports”](#) on page 274.

1-2-3

Print patron billing statements

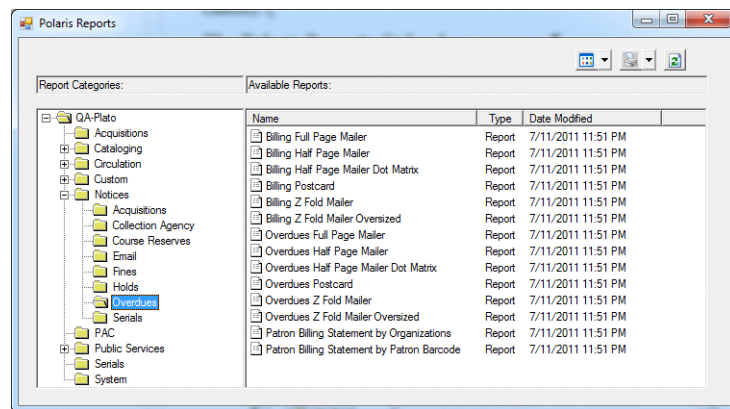
A patron billing statement details all the outstanding charges on a patron's account. It does not affect the notices queue. Follow these steps to print patron billing statements.

1. Select **Utilities, Reports and Notices** on the Polaris Shortcut Bar (staff client).

The Polaris Reports dialog box appears.

2. Expand the **Notices** folder.
3. Select the **Overdues** folder under Notices.

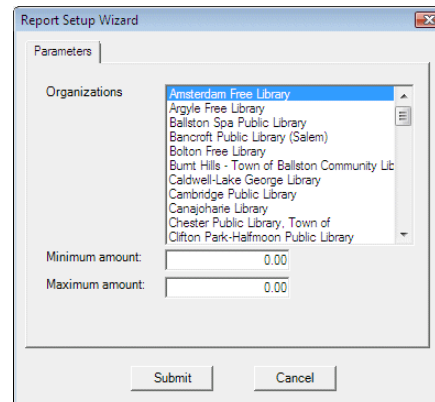
The notices are displayed in the **Available Reports** list.



4. To print patron billing statements by organization, follow these steps:

- a) Double-click **Patron Billing Statement by Organizations**.

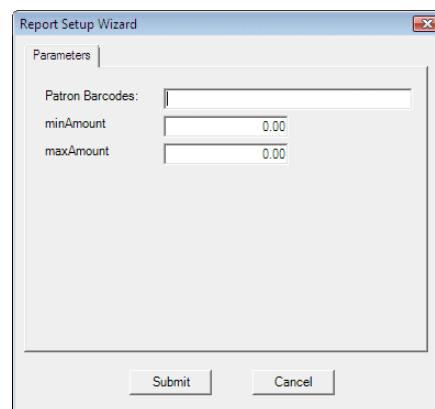
The Report Setup Wizard opens.



- b) Select the organizations whose patrons should receive a billing statement.

- c) In the **Minimum amount** box, type the minimum amount of outstanding charges on a patron's record that determines whether a billing statement is generated for the patron.
 - d) In the **Maximum amount** box, type the maximum amount of outstanding charges on a patron's account that determines whether a billing statement is generated for the patron.
5. To print patron billing statements for specific patrons, follow these steps:
- a) Double-click **Patron Billing Statement by Patron Barcode**.

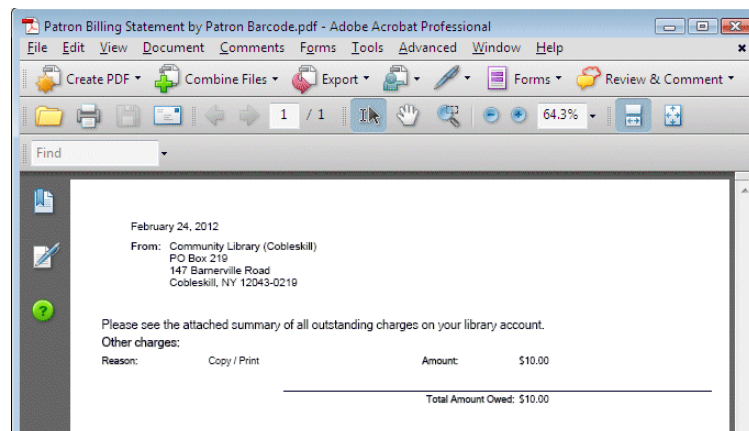
The Report Setup Wizard appears.



The image shows a 'Report Setup Wizard' dialog box with a 'Parameters' tab. It contains three input fields: 'Patron Barcodes:' (empty), 'minAmount' (0.00), and 'maxAmount' (0.00). At the bottom are 'Submit' and 'Cancel' buttons.

- b) Type or scan the patron's barcode in the **Patron barcode** box.
- You can enter multiple barcodes, separated by commas (255 characters maximum). The barcodes are not validated; if you enter an incorrect barcode, a billing statement for that patron will not be generated.
6. Click **Submit**.

After a few moments, the statements are generated and the Report Preview window opens.



The image shows a preview of a PDF document titled 'Patron Billing Statement by Patron Barcode.pdf' in Adobe Acrobat Professional. The document content includes:

February 24, 2012
From: Community Library (Cobleskill)
PO Box 219
147 Barnerville Road
Cobleskill, NY 12043-0219

Please see the attached summary of all outstanding charges on your library account.

Other charges:

Reason:	Copy / Print	Amount:
		\$10.00

Total Amount Owed: \$10.00

7. Review the statements, if necessary.

You can click the arrows at the bottom of the Report Preview window to see the notices one by one. Or, click the **Pages** tab to see several statements at once.

Note:

If you see problems, or change your mind about printing the statements, close the Report preview window.

8. Click the printer icon  to print the statements.
The Print dialog box appears.
9. Modify the printer settings, if necessary, and click **OK**.
The statements are printed.

Delivering Notices By E-mail

You can send overdue, billing, fine, hold request, reminder, and routing notices by e-mail. Most e-mail notices are sent automatically by the Polaris E-mail Manager, and posted by the SQL Server job Notice Processing, the job that processes all notices.

Note:

A separate SQL job, **Hold Notice Processing**, processes e-mail and text message (SMS) first and second hold notices separately. Designed to run multiple times per day, the job runs every 4 hours from 9:00 a.m. to 8:00 p.m. by default. See [“Hold Notice Processing for E-Mail and Text Message Notices”](#) on page 404.

The **To** field in an e-mail notice is taken from the e-mail address field in the patron record. You specify the **From** field, any **Reply To** address, and any footer with the Notification Options parameter. See [“Set up notification methods, e-mail options, and export location”](#) on page 409. When you send e-mail notices, the appropriate queue is cleared, the transaction is posted, and a summary report is sent to the e-mail addresses specified when you set up notification. The summary report is also available from the Report Manager. Select **Utilities, Reports and Notices** on the Polaris Shortcut Bar to open the Report Manager. In the Report Manager, select **Notices, Email, Email_SummaryReport**.

Special announcements are free-text e-mail messages, such as for a book sale, that are not part of the automated notification process. You can send special announcements by e-mail manually, using the Polaris E-mail Manager utility. See [“Send e-mail special announcements”](#) on page 444.

The default e-mail format is HTML. However, certain e-mail servers send HTML messages in odd format, or insert strange characters in the messages. You can specify plain-text format for specific patrons through an option in the Patron Registration workform - General view. See [“Add general data to a patron record”](#) in the *Polaris Patron Services Guide 4.1R2*. You can also set plain text as a default setting in new patron records. See [“Setting Patron Registration Defaults and Requirements”](#) on page 41 and [“Setting Express Registration Defaults and Requirements”](#) on page 46.

Note:

Plain-text e-mail notices have the following limitations:

- Detailed content is displayed in separate lines instead of in one line or one group.
- Combined notices may include some fields that are correctly suppressed in HTML notices.

E-Mail Failure Detection

Before e-mail notices are sent to patrons, an internal test message is sent to the Reply-to e-mail address if available; otherwise, the test message is sent to the **From** address specified in the **Notification options** parameter. This message verifies the SMTP connection and notifies the sender application that e-mail processing will run. The reporting server connection is also checked. If the SMTP connection or reporting server connection cannot be verified, the e-mail notices are not generated or sent. Failures are recorded in the PolEmailManager program log file:

[server]\PolarisProgramData\[version]\Logs\POLEMAILMANAGER

The notices are not posted, and are re-sent the next time notices are processed.

If an e-mail notice is sent but fails due to a poorly formatted e-mail address, or the recipient server rejected it, the failure is recorded in the notification log and the notice set to print instead. It is then posted with the rest of the printed notices when they are run. These failures are listed in the **Email delivery failure report** available from the Polaris Shortcut bar. Select **Utilities, Reports and Notices** on the Polaris Shortcut Bar to open the Report Manager. In the Report Manager, select **Notices, Email delivery failure** to list any failed e-mail notices. You can filter this report by date and reporting branch.

Note:

This process does not apply to reminder notices. When a reminder e-mail notice fails due to an invalid e-mail address, it is posted and not sent to print.

An e-mail notice may be sent but fail due to reasons other than being poorly formatted or rejected by the recipient mail server. These failures can occur, for example, when a mailbox is busy or temporarily unavailable. In this case, the notice is not posted and is re-sent the next time notices are processed.

Note:

If *no* patrons receive scheduled e-mail messages, the SMTP server may not be set up properly. For help with SMTP installation, see your Windows server help file.

Automatic E-Mail Report

You can set Polaris to send a report to one or more e-mail addresses after the notices are generated. The report includes the starting and completion date and time, the number of notices of each type that were generated, and the name, barcode, and e-mail address (if any) of each recipient. See [“Set up notification methods, e-mail options, and export location”](#) on page 409.

1-2-3

Set up e-mail notification prerequisites

Follow these steps to prepare Polaris for e-mail notification.

1. In Polaris Administration, set the PAC profile **Email notification: Server running SMTP service** for the organization.

Use the computer name where the SMTP service is installed.

2. On the Polaris *database server*, create a desktop shortcut to **/Program Files/Polaris/[version]/Bin/PolEmailManager.exe**.

The **PolEmailManager.exe** utility is used to send special announcement e-mail messages.

3. Set up reverse DNS in Active Directory for your network.

Reverse DNS is used to authenticate a sender's address with the domain. This step helps ensure your patrons will receive their e-mail notices. As a security measure, certain Internet service providers block e-mail to their users if they cannot find the sending server.

1-2-3

Send e-mail special announcements

Most e-mail notices are run automatically by the SQL Server job Notice Processing. However, you can send special announcements manually.

Note:

A separate SQL job, **Hold Notice Processing**, processes e-mail and text message (SMS) first and second hold notices separately. See ["Hold Notice Processing for E-Mail and Text Message Notices"](#) on page 404.

Follow these steps to send special announcements by e-mail.

1. Be sure that e-mail prerequisites have been set up. See ["Set up e-mail notification prerequisites"](#) on page 444.
2. On the Polaris database server, double-click the desktop shortcut to **/Program Files/Polaris/[version]/Bin/PolEmailManager.exe**.

The Polaris E-mail Manager dialog box appears.

3. Type a topic for the message in the **Subject** box (1,000 characters maximum).
4. Type the announcement text in the **Message** box. (You may want to add "Please do not reply to this message.")

The maximum message size is 64 KB.

5. Click **Send** to send the message.

The special announcement is sent to all patrons with a valid e-mail address.

6. Click **Close** to exit the Polaris E-mail Manager dialog box.

Tip:

Particularly for longer messages, you may want to create the message text in a word processor, spell-check the text, and save it as a text file. Then copy and paste the message into the Polaris Email Manager.

Delivering Notices by Text Message

Text message notices to patrons' mobile phones are sent as part of normal notice processing. You can send notices by text message alone, or in addition to another method. For example, you can send a request notice by text message only, or by conventional e-mail with an additional text message. As with other notification methods, you can set text messaging as the patron's preferred notification method in the Patron Registration workflow.

Text messages are sent by the Polaris E-mail Manager as part of conventional e-mail notice processing. They are included in the Summary Report as a separate notification category. For more information about e-mail notice setup and processing, see [“Delivering Notices By E-mail”](#) on page 442.

Note:

A separate SQL job, **Hold Notice Processing**, processes e-mail and text message (SMS) first and second hold notices separately. Designed to run multiple times per day, the job runs every 4 hours from 9:00 a.m. to 8:00 p.m. by default. See [“Hold Notice Processing for E-Mail and Text Message Notices”](#) on page 404.

Successful text message notices are posted and the appropriate patron and item records are updated accordingly. Failed text message notices where text message is the specified notification method are converted to print. Failed “additional” text messages are not converted.

Text Message Notice Delivery Failure Report

The report TXT Delivery Failure Report is available from the Polaris Shortcut Bar. To access the report, select **Utilities, Reports and Notices** (Notices folder). The report lists all failed TXT notices for a specified time period for selected or all organizations. The organizations are the notification branches (the branches responsible for sending the notices). TXT notice failures may be detected for empty e-mail body content or SMTP server failure. A message that cannot be delivered because the address has changed or the remote server does not respond (a delivery failure) is not included in this report.

For each failure, the report lists the patron's barcode, branch, and name; the phone carrier and the carrier's SMS e-mail address; the failure reason and failure date. If multiple failed notices were generated to the same patron during the specified time period, the patron is listed multiple times.

Patron Record Settings

For a patron to receive text message notices, either as a preferred method or in addition to other methods, the following settings must be made in the patron record (Patron Registration workflow):

- **Phone 1, Phone 2, or Phone 3** entry, with **TXT** checked and a carrier selected from a drop-down list for the phone entry. The available carriers are set in Polaris Administration. See [“Specify available carriers for phone and text messages”](#) on page 449.

Patron Registration - 357291 - Addresses - Polaris

File Edit View Links Tools Help

Barcode: 987654321 Registered at: Community Library (Cobleskill) (COB)

Last name: Farsad Patron code: Regular

First name: Timothy

Middle name: James

Title: Suffix:

Expiration: ☒ Instructor (Primary)

Term: 0 Date: 2/10/2013

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Zip Code	County	Country
Home	419 First St		LIVERPOOL	NY	13088	ONONDAGA	USA
Work	314 Second St.		LIVERPOOL	NY	13088	ONONDAGA	USA

Address Check

Term: 0 Date: 2/10/2011

Add... Edit... Remove Mailing Label

Notices/bills address: Home

Notification option: Email Address

☐ Additional TXT notice

eReceipt option: (None)

Email address: liverpoolhistorian@yahoo.com

Alt Email address:

Phone 1: 315-451-3639

Phone 2: 315-123-4567 Verizon ☒ TXT

Phone 3:

FAX number:

For Help, press F1

NUM

- To set text messaging as the patron's preferred notification method, select **TXT message** from the **Notification option** drop-down list.

Note:

The default notification settings for normal and express patron registration are controlled by the Patron Services parameters **Patron registration options** and **Express patron registration options** respectively. You can select **TXT Messaging** as the default notification option for either or both of these parameters.

Patron Registration - 357291 - Addresses - Polaris

Barcode: 987654321 Registered at: Community Library (Cobleskill) (COB)

Last name: Farsad Patron code: Regular

First name: Timothy

Middle name: James

Title: Suffix:

Expiration: ☒ Instructor (Primary)

Term: 0 Date: 2/10/2013

Type	Street One	Street Two	City	State	Zip Code	County	Country
Home	419 First St		LIVERPOOL	NY	13088	ONONDAGA	USA
Work	314 Second St.		LIVERPOOL	NY	13088	ONONDAGA	USA

Address Check

Term: 0 Date: 2/10/2011

Notices/bills address: Home

Notification option: **TXT Messaging**

☐ Additional TXT notice

eReceipt option: (None)

Email address: liverpoolhistorian@yahoo.com

Alt Email address:

Phone 1: 315-451-3639

Phone 2: 315-123-4567 Verizon

Phone 3:

FAX number:

For Help, press F1

Select (check) **Additional TXT notice** if you plan to send text messages in addition to another notice format. For example, the first overdue notice may be sent by e-mail and an additional text message. This option must be checked both in the System Administration control for the notice and in the patron record for the patron to receive the additional text message. If a patron registers or updates account information online through Polaris PowerPAC and supplies a phone number and carrier, this option is automatically checked.

Note:

Additional text message notices do not appear in the patron's notification history.

Patron Registration - 357291 - Addresses - Polaris

Barcode: 987654321 Registered at: Community Library (Cobleskill) (COB)

Last name: Farsad Patron code: Regular

First name: Timothy

Middle name: James

Title: Suffix:

Expiration: ☒ Instructor (Primary)

Term: 0 Date: 2/10/2013

Type	Street One	Street Two	City	State	Zip Code	County	Country
Home	419 First St		LIVERPOOL	NY	13088	ONONDAGA	USA
Work	314 Second St.		LIVERPOOL	NY	13088	ONONDAGA	USA

Address Check

Term: 0 Date: 2/10/2011

Notices/bills address: Home

Notification option: Email Address

☒ Additional TXT notice

eReceipt option: (None)

Email address: liverpoolhistorian@yahoo.com

Alt Email address:

Phone 1: 315-451-3639

Phone 2: 315-123-4567 Verizon

Phone 3:

FAX number:

For Help, press F1

Text Message Content

You can edit text message notices in Polaris WebAdmin (Language Editor). If you edit the messages, be aware of these rules:

- **Character limit** - Individual messages are limited to 160 characters including the subject line, if specified, and the sender's address if the carrier includes it. Longer messages may be split and sent as multiple messages.
- **URLs** - You can include a URL in the message, but note that the URL takes up message space and the link may not be active, depending on the patron's carrier.
- **Languages** - Text messaging does not support Unicode, so text message notices in languages with diacritics are not rendered accurately.

For more information about editing notices and a list of default text message notices, see the *Polaris WebAdmin (Language Editor) Guide* or WebAdmin online Help.

1-2-3

Specify available carriers for phone and text messages

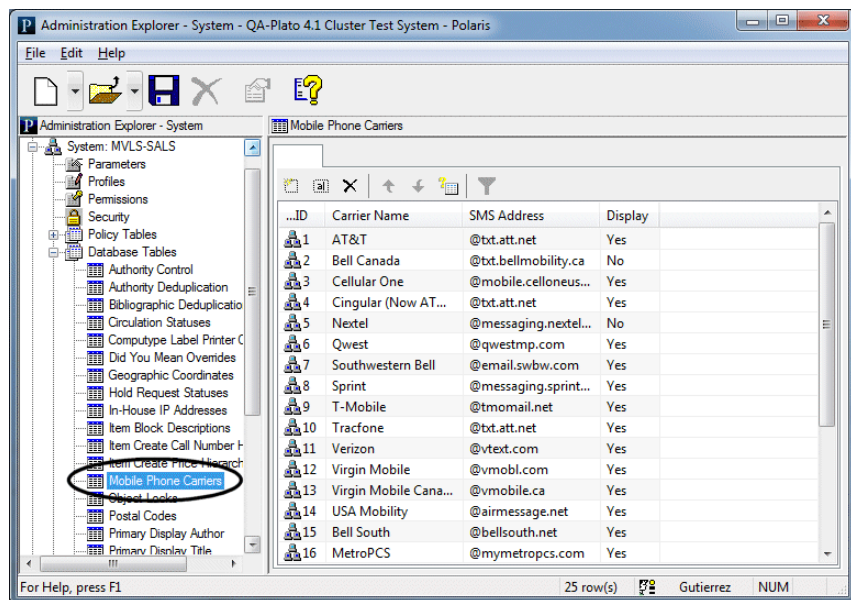
You set up the list of possible mobile phone carriers for conventional phone and text messages in Polaris Administration. The carriers you specify are then available for selection in the Patron Registration workflow and when patrons register or update their account information from the PAC. Follow these steps to set up text message carriers.

Note:

You need the system-level System Administration permission **Modify mobile phone carriers: Allow** to work with this table.

1. In the Administration Explorer tree view, open the **Database Tables** folder for the system, and select **Mobile Phone Carriers**.

The Mobile Phone Carriers table is displayed in the details view.



2. To add a carrier, click  to display the Insert Mobile Phone Carriers dialog box.

3. Type the carrier display name in the **Carrier Name** box (100 characters maximum).

This name will appear in the drop-down list of carriers on the Patron Registration workflow and the PAC self-registration and contact information update forms.

4. Type the carrier's SMS (text messaging) address in the **SMS Address** box (100 characters maximum).

Addresses must include the @ sign, which can appear anywhere in the field. This exact address will be used to send text message notices to patrons who use this carrier.

Examples:

AT&T - @txt.att.net

Verizon - @vtext.com

T-Mobile - @tmomail.net

5. Set the **Display** setting to **Yes** to display this carrier in the lists of carriers, and click **OK** on the dialog box.

The Mobile Phone Carriers database table appears with the new carrier entry. The status bar indicates that the modification is pending.

Tip:

Polaris provides a list of common carriers in the table. Use this method to suppress a carrier that you do not want to display for selection.

6. To change a display setting, follow these steps:

- a) Select the carrier and click .

The Modify Mobile Phone Carriers dialog box appears.

- b) Set the **Display** setting to **Yes** or **No**, and click **OK** on the dialog box.

7. Select **File, Save** to save your changes.

The status bar indicates that the record is saved. New carriers are available as options for every organization in the system.

Related Information

- **Modify a table entry** - Select an entry, click , and edit the entry. To delete an entry, select the entry and click .

Note:

If the modification or deletion would cause an existing setting to be invalid in a patron record, you receive a warning message when you attempt to save your changes. If you choose to continue, the carrier is set to **None** in the patron record and text message notices will not be delivered.

- **Setting patron self-registration options** - See "[Setting Patron Access Options](#)" in the *Polaris Public Access Administration Guide 4.1R2*.

Setting Up SIP Self-Check Circulation



Polaris supports two types of self-check systems: those that rely on SIP protocol as the interface between the self-check unit and Polaris, and Polaris[®] ExpressCheck[™] units, which interact with Polaris directly.

Polaris ExpressCheck workstations and the Polaris ExpressCheck client application are available to your library by contract. For information about setting up the workstations and setting the Polaris Administration parameters that control Polaris ExpressCheck functions, see the *Polaris ExpressCheck Administration Guide*.

See the following topic:

- [“Setting Up SIP Self-Check”](#) on page 452

Setting Up SIP Self-Check

Libraries circulate many different types of materials, such as CDs, books, microforms, and periodicals. SIP self-check units have specific media classifications for each material type. When you are setting up the self-check interface, you must associate each Polaris material type with a self-check media type. You also indicate whether the media is magnetic and if the security strip can be desensitized. If necessary, you can block certain material types from being checked out at a SIP self-check unit. You associate Polaris material types with self-check media types in the Self-Check Material Types policy table. See [“Add a self-check material type entry”](#) on page 453.

You also set self-check parameters for the following functions:

- Self-check unit staff assignment, staff logon user name, staff logon password, and patron password requirement
- Check-out conditions and blocks
- The messages the self-check unit should use, and the message text
- Self-check unit operating conditions, such as number of retries allowed, whether the unit continues to work if the Polaris system is unavailable, and the inactivity time-out period

See [“Set SIP self-check parameters”](#) on page 456.

Note:

Polaris Library Systems also offers Polaris ExpressCheck workstations, which are self-check stations that communicate directly with the Polaris database, and certain self-check material type settings also apply to Polaris ExpressCheck. These are noted in [“Add a self-check material type entry”](#) on page 453. For information about setting up Polaris ExpressCheck units, see the *Polaris ExpressCheck Administration Guide*.

1-2-3

Add a self-check material type entry

Self-check material types can be set from the system, library, and branch levels, but the same self-check material types are shared by all organization levels and are assigned to the system organization record. Follow these steps to add a self-check material type to the Self-Check Material Types policy table.

Note:

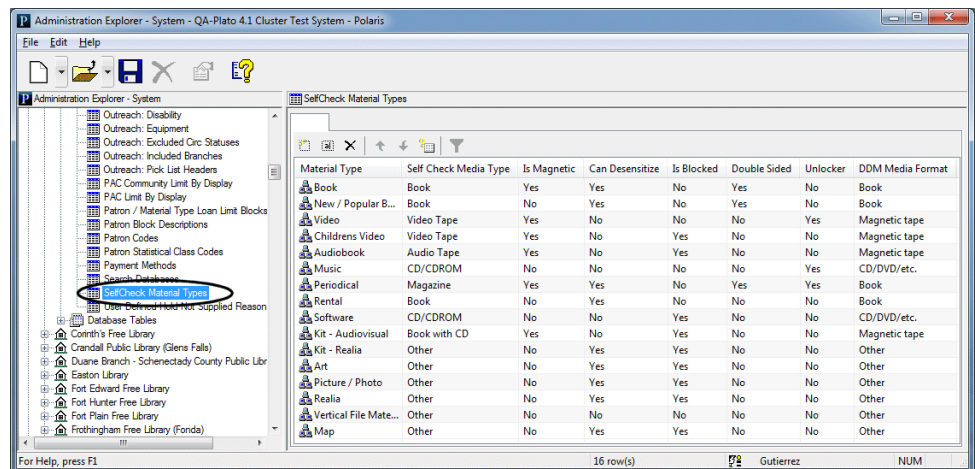
These System Administration permissions are required to work with this table: **Access administration: Allow, Access tables: Allow, Modify self check material types table: Allow.**

1. In the Administration Explorer, open the Policy Tables folder for the organization, and select **SelfCheck Material Types**.

The SelfCheck Material Types table is displayed in the details view.

Note:

The Self-Check Material Types policy table is displayed from the Administration Explorer only. You cannot access the table from an organization workflow.



2. Click  to display the Insert Self Check Material Types dialog box.

The dialog box titled 'Insert : Self Check Material Types' contains the following fields and controls:

- Material Type: [Dropdown menu]
- Self Check Media Type: [Dropdown menu]
- Is Magnetic: [Dropdown menu]
- Can Desensitize: [Dropdown menu]
- Is Blocked: Yes [Spin button]
- Double Sided: Yes [Spin button]
- Unlocker: Yes [Spin button]
- DDM Media Format: [Dropdown menu]
- OK button
- Cancel button

3. Select a Polaris material type in the **Material Type** box.

4. In the **Self Check Media Type** box, select the self-check media type to associate with the material type displayed in the **Material Type** box.

Note:

If one of your Polaris material types does not closely match a self-check media type, use the **Other** media type.

5. In the **Is Magnetic** box, indicate whether the material type is magnetic by choosing one of the following options:
 - If the material type is not affected by magnetic fields, select **No**.
 - If the material type is a magnetic medium, such as a video tape or cassette tape, select **Yes**.
 - If you are not sure if the media can be damaged by magnetic fields, select **Unknown**.

Note:

Polaris ExpressCheck client software supports ITG's RFID, EM, and AVLocker security options. If you use Polaris ExpressCheck on ITG hardware with electromagnetic (EM) strip security, your setting for **Is Magnetic** also applies to Polaris ExpressCheck.

6. In the **Can Desensitize** box, indicate whether the security strip for the material type can be desensitized by choosing one of the following options:
 - If the material type is not a magnetic medium, has a security strip, and *can be desensitized*, select **Yes**.
 - If the material type is a magnetic medium, such as a video tape or cassette tape, select **No**.
 - If the material type is not circulated, select **No**.
 - If you do not know if the material type can be damaged by magnetic fields or if it has a security strip, select **Unknown**.

Note:

Polaris ExpressCheck client software supports ITG's RFID, EM, and AVLocker security options. If you use Polaris ExpressCheck on ITG hardware with electromagnetic (EM) strip security, your setting for **Can Desensitize** also applies to Polaris ExpressCheck.

Important:

The Polaris Security Manager is automatically installed if you select RFID, EM (electromagnetic), or AV Locker security options while installing Polaris ExpressCheck, or RFID while installing the Polaris staff client. TCP port 8075 is used by the Security Manager. This port must be open if any security measures (RFID, EM, AV Locker) are used.

7. In the **Is Blocked** box, choose one of the following options to indicate if items of this material type can be checked out at a self-check unit:
 - If the material type can be checked out with a self-check unit, select **No** (not blocked).
 - If the material type must be checked out by library staff or cannot be checked out at all, select **Yes** (blocked).

Important:

Your blocked settings also apply to check-outs from Polaris ExpressCheck.

8. In the **Double Sided** box, specify whether both spine and main magnets should be used when desensitizing an item.

Note:

Polaris ExpressCheck client software supports ITG's RFID, EM, and AVLocker security options. If you use Polaris ExpressCheck on ITG hardware with electromagnetic (EM) strip security, your setting here also applies to Polaris ExpressCheck.

9. In the **Unlocker** box, specify whether the AV security locker should be opened following a checkout of this material type.

Note:

This setting applies *only* to Polaris ExpressCheck client software installed on an ITG workstation with the AV locker security option.

10. If you use EnvisionWare RFID, select the Danish Data Model (DDM) format for this material type in the **DDM Media Format** box.
11. Click **OK** on the dialog box.

The Self Check Material Types table is displayed with the new entry.
The status bar indicates that the modification is pending.
12. Select **File, Save** to save your changes.

Related Information

- **Modify a table entry** - Select the entry and click . You can change all elements in the self-check material type entry. Any changes made to an entry are applied to all organizations in Polaris.
- **Delete a table entry** - Select the entry and click . Removing an entry at any organization removes the entry from all organizations.
- **Polaris material types** - See “[Defining Material Types](#)” on page 198.
- **EnvisionWare RFID and DDM media formats** - Go to http://www.envisionware.com/en/ddm_use
- **Polaris ExpressCheck setup** - See the *Polaris ExpressCheck Administration Guide*.

1-2-3

Set SIP self-check parameters

Self-check parameters can be set at the system, library, and branch level. Each level may have a different set of parameters, depending on where the self-check units are installed:

- If a single self-check unit is installed on the Polaris system, set the system level parameters only.
- If multiple self-check units are installed and all units use the same settings, set the system level parameters only.
- If multiple self-check units are installed throughout the Polaris system and each branch uses the units differently, set the parameters at the branch level.

The self-check unit does not need to be installed to set the self-check parameters in Polaris Administration. Follow these steps to set self-check parameters.

Tip:

You can work with self-check parameters from the Administration Explorer or from an organization workflow.

1. In the Administration Explorer tree view, expand the organization folder and select **Parameters**.
2. Select the **SelfCheck Unit** tab in the details view.
3. Set **Allow SIP processing** to **Yes**.
4. Set the following system identification parameters:
 - **Assigned staff member** - The library staff member listed for self-check circulation transactions.
 - **SIP default workstation** - The workstation ID listed for self-check transactions.
 - **SIP Login Password** - The staff password needed to log in to self-check.
 - **SIP Login User ID** - The staff user name needed to log in to self-check.
5. Select the **Default security marker** value, and from the list, choose the type of security marker your library uses on items. Select **None** if you do not use security markers.
6. Double-click **Patron blocks** and set the following options for blocking conditions on patron records:

Patron Blocks [Community Library (Cobleskill) (br)]

Retrieved from: QA-Plato 4.1 Cluster Test System (sys)

Block the patron for:

- ☒ Free text blocks
- ☒ Library assigned blocks
- ☐ Blocking notes
- ☐ Associated patron blocks
- ☐ Collection agency blocks

Maximum claims: 10

OK Cancel Help

- **Block the patron for free text blocks** - This parameter affects the SIP messages Patron Status and Patron Information. Many SIP check-out devices check the Patron Status or Patron Information message before attempting to perform a checkout. On these devices, if this parameter is checked, a patron with free text blocks will be blocked from checkout. Checked by default (patron will be blocked).
- **Block the patron for library-assigned blocks** - Checked by default (patron will be blocked).
- **Block the patron for blocking notes** - Checked by default (patron will be blocked).
- **Block the patron for associated patron blocks** - Blocks SIP self-check transactions by patrons with blocked associated patron records. See [“Associated Patron Blocking”](#) on page 356. Unchecked by default (patron will not be blocked if associated patrons are blocked).
- **Block the patron for collection agency blocks** - Blocks SIP self-check workstation transactions by patrons with collection agency blocks. Checked by default (patron will be blocked).
- **Maximum number of claims** - Maximum number of current claims a patron can have and still check out an item using self-check. Default value is 10; valid range is 0-9999.

7. Set the following additional check-out conditions and blocks as needed:

Note:

SIP circulation uses the settings in the Patron/Material Type Loan Limit Blocks policy table to determine check-out blocks based on maximum items out, material type limits, maximum overdues, and similar settings. See [“Defining Loan and Request Limit Blocks”](#) on page 332. Material type group limits also apply to SIP circulation. See [“Defining Material Type Group Limits”](#) on page 348.

- **Allow checkouts during renewal** - Permits a patron to check out an item that is recorded as already checked out to another patron.
- **Checkins ok** - Permits check-in at the self-check station.
- **Checkouts ok** - Permits check-out at the self-check station.
- **Deny checkout if item is from another branch** - Prevents item check-out at this self-check unit if the item belongs to another branch.
- **Deny checkout if there are notes** - Prevents check-out if the patron record has a Blocking note.
- **Holds ok** - Permits hold requests at the self-check station.
- **Renewals ok** - Permits renewals at the self-check station.

Note:

Renewals via SIP are blocked as they would be in PAC, according to the thresholds set in the Patron Services profile **Patron initiated circulation: Blocking conditions**.

- **Allow check-out of items with free text blocks** - This parameter refers to items only. If set to **Yes** (default), an item with a free text block can be checked out. If set to **No**, items with free text blocks cannot be checked out.
- **Allow check-out items with library-assigned blocks** - This parameter refers to items only. If set to **Yes** (default) an item with a library-assigned block can be checked out without interruption. If set to **No**, items with a library-assigned block cannot be checked out.

Note:

To prevent check-out of specific item material types, use the Self Check Material Types policy table. See ["Add a self-check material type entry"](#) on page 453.

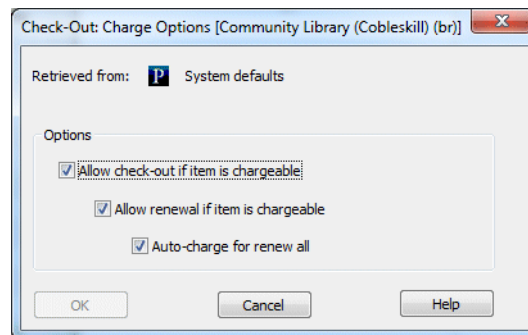
8. If certain items might carry charges for checkout or renewal, follow these steps to set how these transactions are handled at the SIP self-check unit:

Note:

The system uses the SIP settings for the workstation's branch, but uses the chargeable settings for the item's assigned branch. For more information about setting up charges for checkout and renewal, see ["Charging for Checkout and Renewal"](#) on page 252.

- a) Double-click **Check-out: Charge options**.

The Check Out: Charge options dialog box opens.



- b) To allow check-outs of chargeable materials from SIP self-check units, select (check) **Allow check-out if item is chargeable**.
- c) When you check **Allow check-out if item is chargeable**, the option **Allow renewal if item is chargeable** becomes available. If you check the renewal option, you can also select **Auto-charge for renew all**.
- d) Click **OK**.

Note:

If the material type is blocked from check-out at SIP self-check units, that setting takes precedence over any chargeable policies and the transaction is stopped.

9. Set these parameters to **Yes** or **No** to specify whether claimed items can be checked in at the self-check unit:
 - **Check-in: Claim Never Had, allow checkin**
 - **Check-in: Claim Returned, allow checkin**
10. Set the following self-check operational conditions as needed:
 - **SIP uses patron passwords** - Requires patron passwords for patrons to use self-check.
 - **Retries allowed** - Number of times the self-check unit attempts to resend a message to the client workstation. Retries may be attempted when there are network problems or if the client software goes offline.
 - **Time-out period: 000 (none) - 999 (not known)** - Number of seconds (in tenths of a second) that the self-check unit pauses before retrying or canceling a transaction that does not receive a response from the client software.
 - **Status update ok (can block a patron, etc.)** - Permits a patron's status to be updated, allowing the unit to create a patron block under limited circumstances. For example, if the self-check unit is equipped to detect tampering (such as swapping out books in a stack) or if the patron forges a card, the unit applies a free text block to the patron record (**Patron was blocked by a selfcheck unit**) and stops the check-out. Set this option to **Yes**. It facilitates testing in some situations and has no impact on check-out processing in units that do not have tamper detection.
 - **Use error correction** - Permits a checksum and sequence number at the end of every message sent to and from the software, which helps maintain data integrity and assists in troubleshooting. The recommended setting is **Yes**.
 - **SIP2 extensions enabled** - Enables specific SIP2 functionality for the self-check units of certain vendors. If you are not sure what your equipment requires, contact your Polaris Site Manager to determine if this parameter should be set to **Yes**.
11. Allow or prevent messages by setting these parameters:
 - To allow messages to be printed on receipts, set **Use printer messages** to **Yes**.
 - To allow messages to be displayed on the screen, set **Use screen messages** to **Yes**.
12. Specify which of the following messages are supported by the self-check unit by setting the **System supports the . . . message** parameters to **Yes** or **No**:

•Block Patron	•Checkin	•Checkout	•End Session
•Fee Paid	•Holds	•Item Info	•Item Status
•Login	•Patron Enable	•Patron Info	•Patron Status
•Renew All	•Renew	•Request Resend	•System Status

These controls refer to messages defined in the SIP protocol and determine which ones are sent as part of normal SIP processing. Refer to the SIP standard for message definitions. All message parameters should be set **Yes** unless your Polaris Site Manager specifically instructs otherwise.

13. To change the text for any of the printer or screen messages, do the following steps:

- a) For the appropriate message parameter, double-click the value.

The text is highlighted in the **Value** box.

- b) Type the new message text, and press **ENTER**.

Example:

If your self-check unit supports check-in messages, set the **System supports the Checkin message** parameter to **Yes**.

To change the message text that appears on the screen when an item is successfully checked in, modify the message text **Checkin Screen Message: Item checkin ok**.

14. Select **File, Save** to save the settings.

Save complete appears in the status bar.

Related Information

- **SelfCheck Unit parameters** - For reference information about specific SelfCheck Unit parameters, see [“Self-Check Parameters Reference”](#) on page 535.
- **Request parameters used in SIP self-check** - The following settings on the Hold options dialog box (available at the system, library, and branch level) apply to self-check units:
 - On the **Staff Client & PAC** tab, when the **Trap at check-out** option is checked, an item that fills a hold request is trapped for the hold when a patron tries to check the item out at the self-check unit or staff client, and the check-out is blocked.
 - On the **Terms** tab, under **Unclaimed requests**, if the **Delete** option is selected for unclaimed requests, the unclaimed request is deleted as soon as the linked item is checked in or out at the self-check unit or staff client.
- **Patron Services parameters used in SIP self-check** - The settings for the following parameters affect SIP self-check units as well as the staff client:
 - **Overdues: Clear fine if recovered at check-out**
 - **Overdues: Clear fine if recovered at renewal**
- **Loan and request limit blocks** - SIP self-check units use your settings in the Patron Loan and Request Limits table for maximum fines, items out, items overdue, and request limits. See [“Defining Loan and Request Limit Blocks”](#) on page 332.

ITG DiscXpress II™ Circulation



The Polaris staff client and Polaris ExpressCheck support circulation from ITG DiscXpress II units. These units consist of a tower of dispensers, each holding up to 100 media discs (DVDs, CDs, Blu-Ray discs). The staff member or patron scans the item barcode from the item's empty case. When a barcode for one of these items is successfully scanned, there are no blocks to check-out, and the system finds a matching barcode in the unit, the patron goes to the dispenser unit to pick up the item. At the dispenser unit, the patron scans her barcode into the DiscXpress unit to retrieve the item.

Polaris supports one ITG DiscXpress II unit (one network address) per location (branch organization). At each branch, multiple staff client and Polaris ExpressCheck workstations can connect to the location's unit.

Note:

Polaris integration with ITG DiscXpress II is available by separate license. Polaris ExpressCheck workstations and the Polaris ExpressCheck application are also available to your library by separate contract. For information about setting up the workstations and setting the Polaris Administration parameters that control Polaris ExpressCheck functions, see the *Polaris ExpressCheck Administration Guide*.

See the following topics:

- [“ITG DiscXpress II - Circulation Overview”](#) on page 462
- [“Setting Up ITG DiscXpress II in Polaris”](#) on page 464
- [“ITG DiscXpress II - Errors and Troubleshooting”](#) on page 469

ITG DiscXpress II - Circulation Overview

With the few exceptions noted below, circulation processes from either the staff client or Polaris ExpressCheck do not differ from normal procedures.

Staff Client

Patron authentication and checking for patron and item circulation blocks occur as in normal check-out processing, before the system checks for dispenser items. Then, when an item is scanned and a material type is detected that has been identified for dispenser processing by the check-out workstation's branch (see [“Enable the media dispenser”](#) on page 465), Polaris queries the dispenser unit specified in the **Network location** setting for the workstation's branch. If a matching item barcode is found in the dispenser unit, the item check-out continues. If you have opted to display a message to staff, a message is displayed for each dispenser item checked out.

Bulk check-out, which is used when processing items for Outreach Services and Borrow by Mail, also supports dispenser circulation. If a dispenser item is encountered during bulk check-out, a message is displayed and the item is checked out.

Staff Client Receipts

At the end of the patron's check-out process, the printed receipt includes the text defined for the workstation's branch in Polaris Administration (see [“Enable the media dispenser”](#) on page 465). The text is printed after any library custom text. If you have chosen to include the dispenser location, this information is included for each item checked out, indicating the dispenser and slot number for the item.

Offline Processing

The dispenser unit can be queried in offline mode and the check-out can continue.

Check-In

Establish the appropriate procedures with library staff for loading checked-in items into the dispenser and reshelving the empty cases. Other than this workflow, no special conditions or exceptions apply to dispenser items when they are checked in.

- **Holds** - The check for hold requests happens before the check for dispenser material type. The item may become Held before being assigned to the dispenser. Staff can re-assign the item after it becomes Held, depending on policy.
- **Floating items** - The check for floating happens before the check for dispenser material type. If the item can float in, the system then checks the dispenser material type. Dispenser items may float to another branch. If no dispenser controls have been defined at the receiving branch, there is no change and the item circulates normally. If dispenser controls have been defined at the receiving branch, the item behaves according to that branch's dispenser settings.
- **Lost, missing, and other status transitions to In** - If the check-in message has been enabled and the material type matches a material type defined for the dispenser unit, the check-in message is displayed as usual.

Polaris ExpressCheck

As in the staff client, patron authentication and checking for patron and item circulation blocks occur as in normal check-out processing, before the system checks for DiscXpress items. Then, when an item is scanned and a material type is detected that has been identified for DiscXpress processing by the check-out workstation's branch (see ["Enable the media dispenser"](#) on page 465), Polaris queries the dispenser unit specified in the **Network location** setting for the workstation's branch. If a matching item barcode is found in the dispenser unit, a message is displayed on the check-out screen (see ["Enable the media dispenser"](#) on page 465). At the end of the check-out session, the dispenser acknowledgement message is displayed. The patron must acknowledge the message to continue. If the message is not acknowledged, the process times out as in any other check-out.

ExpressCheck Receipts

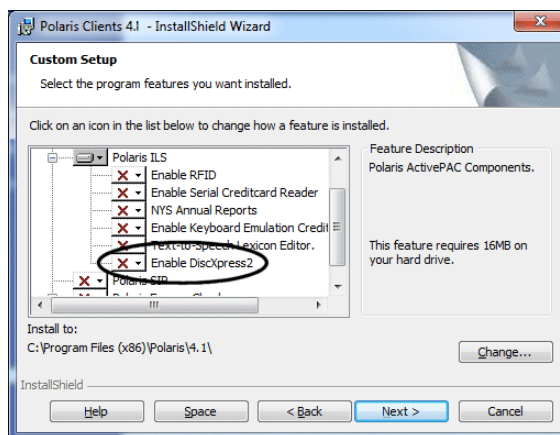
If the patron opts to print a receipt or if the receipt prints when the patron selects **Exit**, the system uses the receipt text specified for the workstation branch (see ["Enable the media dispenser"](#) on page 465). If the option to print individual receipts for each item has been enabled for the ExpressCheck unit, the message prints at the end of each item in the dispenser unit. If you have chosen to include the dispenser location (see ["Enable the media dispenser"](#) on page 465), this information is included for each item checked out, indicating the dispenser and slot number for the item.

Note:

If the patron opts to not print a receipt or to receive a receipt by e-mail, no additional dispenser receipt is printed.

Setting Up ITG DiscXpress II in Polaris

Select the ITG DiscXpress option during Polaris ExpressCheck or staff client installation. The illustration shows the option for staff client installation.

**Note:**

You can install ITG DiscXpress II with or without ITG RFID.

Then, set up ITG DiscXpress in Polaris Administration as described in the following sections.

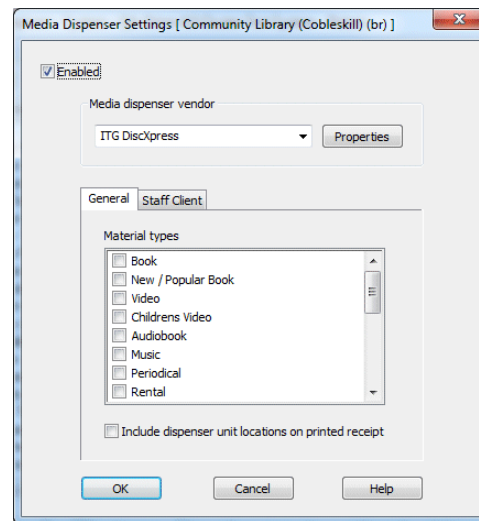
1-2-3

Enable the media dispenser

Follow these steps to set up media dispenser processing in Polaris Administration.

1. In Polaris Administration, double-click the SelfCheck Unit parameter **Media dispenser settings**. This parameter is available at the system, library, or branch level.

The Media Dispenser Settings setup dialog box opens.



2. Select (check) **Enable**.

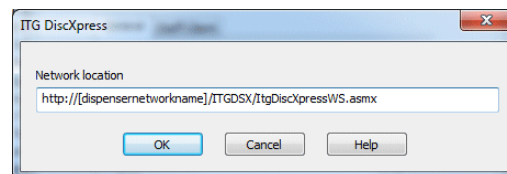
Note:

ITG DiscXpress II is the only media dispenser vendor currently available.

3. Specify the network location of the dispenser unit:

- a) Click **Properties**.

The ITG DiscXpress dialog box opens.



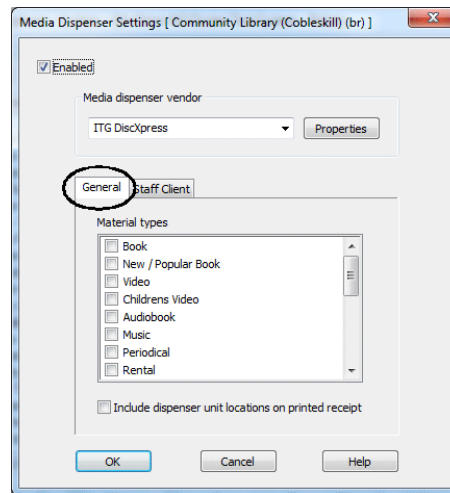
- b) Type the full network address or URL of the dispenser unit (100-character limit). This information is provided by your network administrator and is determined when the device is installed on your network.

- c) Click **OK**.

The ITG DiscXpress dialog box closes.

4. On the General tab, select (check) the material types that can be dispensed by the unit.

The list includes all the item material types defined at the system level. You must select at least one material type.



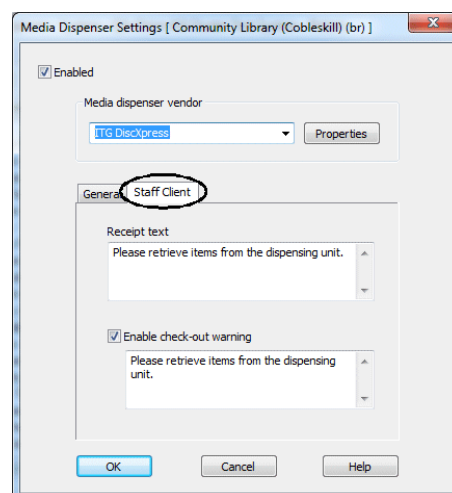
5. To include the dispenser location and slot number on printed check-out receipts, select (check) **Include dispenser unit location on printed receipt**.

This option applies to both staff client and ExpressCheck receipts.

Note:

Normal check-out receipts from the appropriate staff client workforms and from Polaris ExpressCheck must be enabled to include this information on a printed receipt. Separate dispenser receipts are not printed.

6. Set the staff client receipt text and check-out warning:
 - a) Click the Staff Client tab.



- b) To specify custom text for the staff client check-out receipt, type the text in the **Receipt text** box (250-character limit).

The default text is **Please retrieve items from the dispensing unit.**

Note:

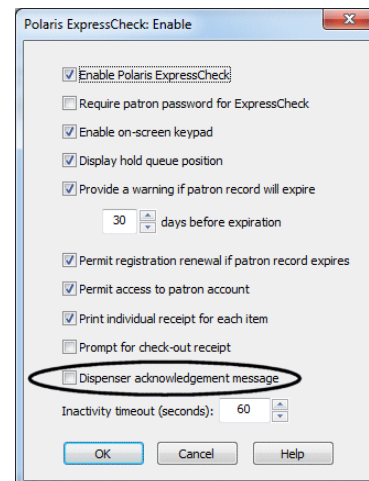
Normal check-out receipts from the appropriate staff client workforms must be enabled to include this information on a printed receipt. Separate dispenser receipts are not printed.

- c) To display a warning message to staff members when a dispenser item is checked out, select (check) **Enable check-out warning.**

The warning message is displayed for each dispenser item during checkout. The staff member must click **OK** to acknowledge the message and continue.

The default warning message text is **Please retrieve items from the dispensing unit.** You can customize the message in the text box (250-character limit).

7. Click **OK** on the Media Dispenser Settings dialog box.
8. To display the on-screen dispenser acknowledgement message in Polaris ExpressCheck, open the SelfCheck Unit parameter **Polaris ExpressCheck: Enable**, and select (check) **Dispenser acknowledgement message**.



The default message is **Checkout Completed Successfully! Please retrieve item from the dispensing unit.** You can edit the message using Polaris Language Editor (WebAdmin); the string ID is

EC_TEXT_CHECKOUT_COMPLETE_DISPENSER

- A similar message is printed on the ExpressCheck check-out receipt. The default message is **Please retrieve items from the dispensing unit.** As appropriate items are checked out at the ExpressCheck workstation, the screen also displays the reminder message **Please remove items from the dispensing unit.** These messages are also available for editing using Polaris Language Editor. The strings IDs are

EC_TEXT_CHECKOUT_RCPT_DISPENSER

EC_TEXT_CHECKOUT_REMINDER

- If the system fails to communicate with the dispenser unit during checkout, the ExpressCheck workstation displays an on-screen message, also available for editing. The default text is **The dispensing unit is not responding. The item cannot be checked out. Please contact a librarian.** The string ID in Polaris Language Editor is **EC_TEXT_CHECKOUT_ERROR_DISPENSER_COMM**

9. Click **OK** on the Polaris ExpressCheck Enable dialog box.

Related Information

- **Polaris material types** - See [“Defining Material Types”](#) on page 198.
- **Polaris ExpressCheck setup** - See the *Polaris ExpressCheck Administration Guide*.
- **Editing Polaris ExpressCheck messages** - See the *Polaris Language Editor (WebAdmin) Guide*.

ITG DiscXpress II - Errors and Troubleshooting

You may occasionally encounter the following conditions and error messages:

- **The system finds no matching item in the dispenser unit** - The check-out process continues. The item is checked out anyway, because it is assumed that the item is in the case.
- **No response from the dispenser unit** - An item is scanned for check-out but the dispenser unit does not respond. In Polaris ExpressCheck, the item check-out fails and a message is displayed (see [“Enable the media dispenser”](#) on page 465). In the staff client, the following message is displayed: **The dispensing unit is not responding. The item may be retrieved manually. Do you want to check this item out?** The staff member must select **Yes** or **No**. **Yes** continues the check-out transaction; **No** stops the transaction.
- **An item will fill a hold request or is already held** - There is no change to current program behavior, which depends on library policy. These checks take place before the system queries the dispenser unit.
- **Items in the dispenser may have a status of Held** - For example, the empty case may have been on the hold shelf or self-pickup shelf. The Held item is be checked out to the patron according to normal check-out processing. The patron goes through a normal dispenser check-out to retrieve the disc.
- **The item is already out to this patron** - Since the item has not gone to In, and so is not in the dispenser, the transaction is a simple renewal.
- **Patron claims not to have an item checked out from the dispenser** - Treat this claim as you would any other claim in Polaris. Staff may have to check the dispenser.
- **Polaris shows that an item is already out to another patron** - If library policy allows the patron to continue check-out and the item is in the dispensing unit, the item is removed from the last patron's record and checked out to the current patron. If the item is not in the dispensing unit, the item is now checked out to the current patron in Polaris but in fact is either still out to the previous patron or is missing. The library should follow its usual practice for trouble-shooting missing items, and if the item is found it should be checked in from the patron record.

- **The dispensing unit has “locked” the item for another patron** - At ExpressCheck, this might happen if a patron scans an item case and the check-out is successful, but the patron leaves the case at the workstation and does not retrieve the item. Another patron scans the case, but the dispenser has queued the item for the first patron. The ExpressCheck workstation then displays a message: **The dispensing unit is holding this item for another library member. The item cannot be checked out. Please contact a librarian.** You can edit the message in Polaris Language Editor (string ID EC_TEXT_CHECKOUT_ERROR_DISPENSER_BIND).
- **Multi-part sets** - The recommended practice is to have a separate item record for each part. If one item barcode is attached to a multi-part set, ExpressCheck has no provision to define or display an alert message for multi-part sets. In the staff client, if the item record contains a blocking note to check for multiple parts, the note is displayed as usual.
- **Post check-out error conditions** - These situations may occur after Polaris processing is complete:
 - **Check out is successful but the patron does not claim disc** - The transaction is complete in Polaris. The dispenser unit has a time out. Trouble-shooting for the dispenser unit is possible by examining the dispenser queue.
 - **Check out is successful but the wrong item is dispensed** - This might happen if an item is incorrectly loaded. The patron must contact library staff, who must examine the dispenser unit.
 - **Check out is successful, but no item is dispensed** - This might happen if the item material type is not correctly entered or identified. The patron must contact library staff, who must examine the dispenser queue.
 - **Check out is successful, but the DVD case already contains another item** - This might happen if the correct item was not loaded into the dispenser unit. The patron should return the item to library staff.

Setting Up Borrow by Mail Circulation



With Polaris Borrow by Mail options, staff members and patrons can request library materials and have the requested materials delivered by mail. Libraries can restrict Borrow by Mail options by patron code, establish a fee for the service, and allow exceptions to the fee for some patrons, such as homebound patrons.

Note:

Polaris Borrow by Mail is available by license. There is no additional cost, but Borrow by Mail features are available only if the license is activated.

Within a library system or consortium, one or more branches can be designated as Borrow by Mail processing centers in Polaris Administration. Processing centers may be actual branches or virtual organizations set up for this specific purpose. When a Borrow by Mail request is placed, the pickup location defaults to a designated processing center, and the item is routed to this location by normal holds routing procedures. You can designate multiple processing centers. Or a branch may handle both normal and Borrow by Mail requests by establishing itself as a processing location. In this case, an optional message alerts staff to a Borrow by Mail request when the item is trapped at circulation.

At the processing center, Borrow by Mail items are placed in packets (one item per package), with an accompanying letter, mailing label, and return address label. They are checked out to the patron and then shipped. A tracking number can then be entered into the request workform. After check-out and until the item is returned, the request status is Out.

For more information about using Borrow by Mail functions in the staff client, see [“Borrow By Mail Circulation”](#) in the *Polaris Patron Services Guide 4.1R2*.

See the following topic:

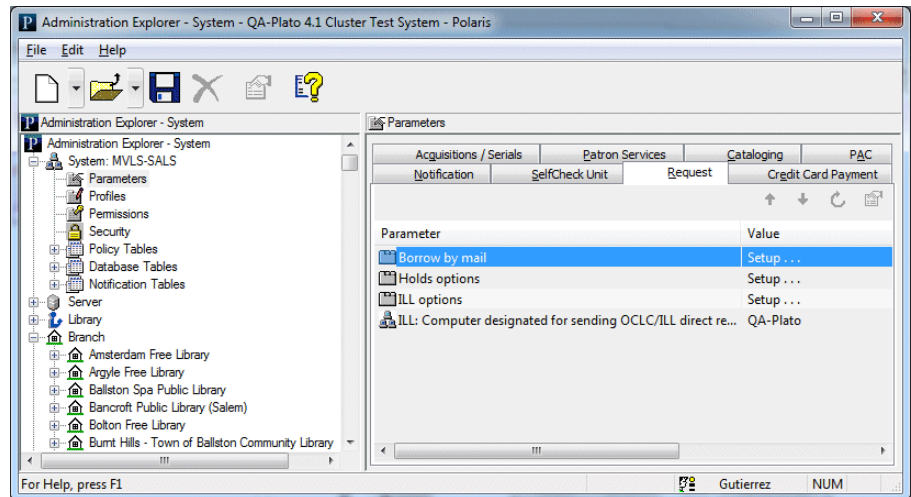
- [“Set up Borrow by Mail circulation”](#) on page 472

1-2-3

Set up Borrow by Mail circulation

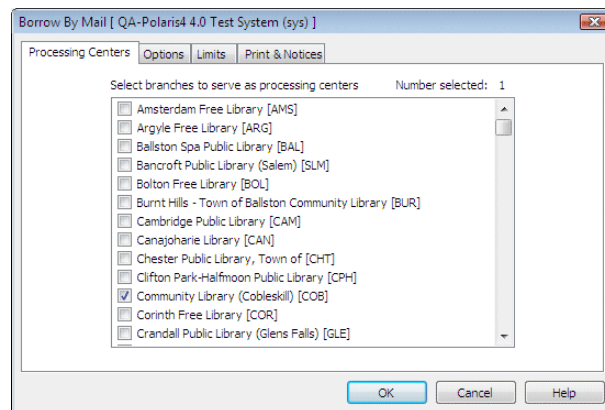
To set up Borrow by Mail, you first designate processing centers at the system level. Other Borrow by Mail settings are available at the library, system, or branch level. Follow these steps to set up Borrow by Mail circulation in Polaris Administration.

1. In the Administration Explorer tree view, open the **Parameters** folder for the system, and click the **Request** tab in the details view.



2. Double-click **Borrow by mail**.

The Borrow by Mail dialog box - Processing Centers tabbed page appears. (This page appears only when the dialog box is opened at the system level.)



3. Select all the organizations that might serve as processing centers for the branches that will enable **Borrow by Mail**.

To enable Borrow by Mail features for any individual organization, at least one organization must be designated as a processing center on this tabbed page.

- If you have one central processing center for the whole system, designate only one processing center.
- If various processing centers will serve various branches, or if branches will serve as their own processing centers, select all the possible processing centers.

Note:

Processing centers may be actual branches or virtual organizations set up for this specific purpose. For more information about creating new organizations, see ["Setting Up Organizations"](#) in the *Polaris Administration Guide 4.1R2*.

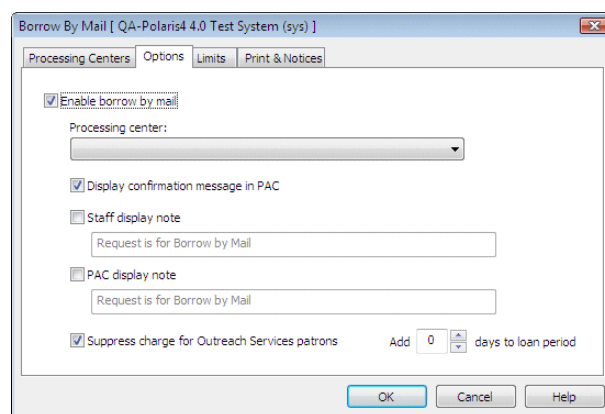
4. If you will set up all Borrow by Mail options at the system level (that is, all organizations will participate in Borrow by Mail and use the same settings), go directly to the next step.

Otherwise, click **OK** to close the dialog box at this point, and re-open it for each organization that will use Borrow by Mail circulation.

5. On the Options tabbed page, select (check) **Enable Borrow by Mail** and select a processing center for this organization.

Note:

Telephone notices include Borrow by Mail messages if Borrow by Mail is enabled at the system level. If you use both telephone notification and Borrow by Mail, enable Borrow by Mail at the system level, then disable it for any branch that is not using Borrow by Mail.



The available options depend on your settings on the system-level Processing Centers tabbed page.

Note:

An item that fills a Borrow by Mail request created in the staff client is shipped to the processing center designated for the log-in branch of the workstation that created the hold request. An item that fills a Borrow by Mail request from the PAC is shipped to the processing center designated for the patron's registered branch.

Important:

Be sure the processing center is listed in the holds routing sequence table for the branch that originated the hold request. See ["Setting Up Holds Routing"](#) on page 280.

6. (Optional) Select (check) **Display confirmation message in PAC** to display a special confirmation message when the patron places a Borrow by Mail request.

Tip:

You can display the patron's contact information on the PAC request confirmation page so that the patron can quickly verify the address to which the Borrow by Mail item will be shipped. See ["Set Holds options: Alerts and blocks"](#) on page 298.

Note:

If the processing center charges a delivery fee (see step 11), this confirmation message states the charge and offers the option to continue or cancel the request.

7. (Optional) Select (check) **Staff display note** and edit the text of the note if you wish (maximum 250 characters). If individual branches process their own Borrow by Mail items along with regular circulations, you should check this option to alert staff members to Borrow by Mail items.

This note is automatically added to the Hold Request workform - Notes view when the request is saved. It then appears when an item that fills the Borrow by Mail request is trapped at circulation, and alerts the staff member that the item requires Borrow by Mail processing. The system uses the processing center's setting.

8. (Optional) Select (check) **PAC display note** and edit the text of the note if you wish (maximum 250 characters).

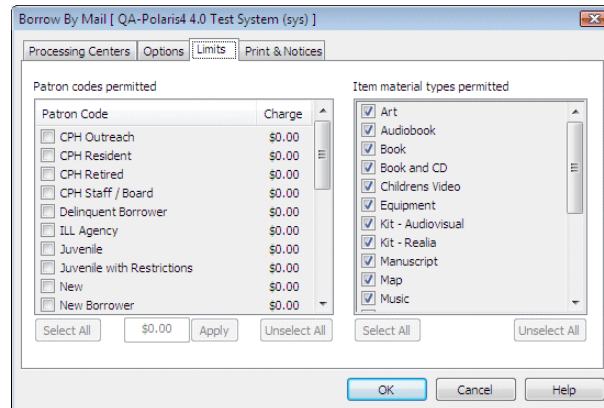
This note is automatically added to the Hold Request workform - Notes view when the request is saved. The note is displayed to patrons in the information view for individual items listed on the PAC patron account Requests page. The system uses the processing center's setting.

Note:

Staff members with the branch-level Circulation permission **Hold requests: Modify PAC display note** can edit the note for individual hold requests on the Hold Request workform - Notes view.

9. Select (check) **Suppress charge for Outreach Services patrons** if you ordinarily charge a delivery fee for Borrow by Mail requests, but you do not want to charge a fee to homebound (Outreach Services) patrons.
10. If you want to change the loan period to accommodate shipping time, select the number of days to extend the calculated loan period for an item.

This setting is available only if the organization is designated as a processing center. The system uses the processing center's setting at bulk checkout. See ["Bulk-Processing Borrow by Mail Items"](#) in the *Polaris Patron Services Guide 4.1R2*.

11. Click the **Limits** tab to set Borrow by Mail limits:

- Check the patron codes for the patrons permitted to place Borrow by Mail requests. The system uses the settings for the patron's registered branch in both the staff client and PAC.
- (Settings available for the system or library level only, or for the processing center defined for a branch organization.) If you want to charge a Borrow by Mail delivery fee, select the appropriate patron code, set the charge amount, and click **Apply**. You can set separate charges for different patron codes. To specify the same charge for multiple patron codes, select the codes, then set the charge amount and click **Apply**. The system uses the processing center's settings for charges. A processing center should set charges for all the patron codes it intends to charge, regardless of whether those codes are used for the processing center's own patrons.

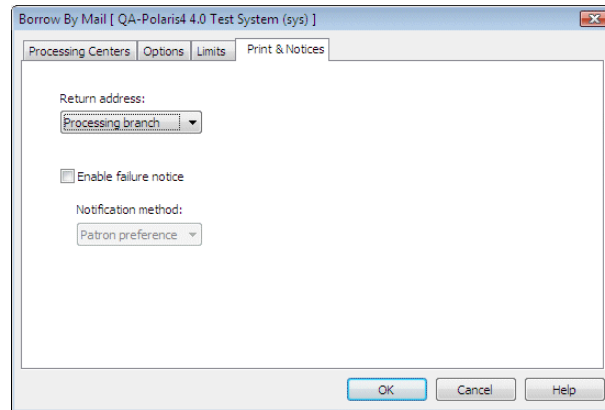
Note:

Requests placed from the PAC use the settings of the processing center for the patron's registered branch, while requests placed from the staff client use the settings of the processing center for the workstation's branch. It is therefore possible that the fee may differ depending on where the request is placed.

- Deselect (uncheck) the item material types that should not be eligible to fill Borrow by Mail requests. For PAC requests, the system uses the setting for the patron's registered library. For staff client requests, the system uses the setting for the workstation branch. Be sure to uncheck any item material types used for econtent such as ebooks.

Note:

You can prevent a specific item from filling a Borrow by Mail request by checking **Do not mail** on the Item Record workform - Cataloging view.

12. Click the **Print & Notices** tab and make the following settings:

- Specify a return address for the item mailer.
You can select **Processing Branch** (default) or **Item's Branch** (item's assigned branch).
- Select (check) **Enable failure notice** to send an automatic notice to the patron when an item cannot be checked out during Borrow by Mail bulk checkout due to blocks on the patron account.
- If you checked **Enable failure notice**, select a notification method.
The available method options are determined by your settings for notification methods on the **Notification options** parameter - General tabbed page. For more information about these settings, see [“Managing Notification”](#) on page 399.

Note:

Telephone notices include Borrow by Mail messages if Borrow by Mail is enabled at the system level. If you use both telephone notification and Borrow by Mail, enable Borrow by Mail at the system level, then disable it for any branch that is not using Borrow by Mail.

13. Click **OK**.

Related Information

- **Borrow by Mail workflows** - See [“Borrow By Mail Circulation”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Request status of Out** - When a held item is checked out, the request status changes to Out until the item is returned. The request is then deleted. The status is automatically enabled for organizations using Borrow by Mail and is displayed in the staff client and the PAC patron account (where it appears as **Sent**). Organizations that do not use Borrow by Mail can choose to display or suppress the display of requests with the status of Out. On the Holds options dialog box - Staff & PAC tabbed page (**Request** parameters), select (check) the option **Display request status “Out”**. The setting for the workstation's logon branch controls the display in the staff client, while the setting for the patron's registered branch controls the display in the PAC patron account.

- **Modify Borrow by Mail item mailer or failure notice text** - You can edit and translate the default text with Polaris Language Editor. See the *Polaris Language Editor Guide* or Language Editor online Help. Foreign language text for the mailer must include the fee as text because the system does not automatically insert the amount in the foreign language translation.
- **Placing Borrow by Mail requests in PAC** - See the *Polaris PowerPAC Guide* or PowerPAC online Help.

Setting Up Outreach Services



Polaris Outreach Services are available by specific contract with Polaris Library Systems. These functions automate title selection and delivery to homebound and other designated patrons, and allow individual patron profiles based on reading preferences, delivery mode, and other characteristics. You can have Polaris generate selection lists for individual patrons, or manage outreach services for multiple patrons, based on the next scheduled delivery date or delivery route. An outreach services “patron” does not have to be an individual; you can set up a patron record for an institution and designate the institution as an outreach services patron. For more information about outreach services workflows, see [“Outreach Services Processing”](#) in the *Polaris Patron Services Guide 4.1R2*.

To set loan periods and fine policies for outreach services patrons, you can set up a patron code or codes to use specifically for these patrons, then set the appropriate loan periods and fine codes for the outreach patron codes. See these topics:

- [“Defining Patron Codes”](#) on page 23
- [“Defining Loan Period Durations”](#) on page 219
- [“Setting Fine Amounts”](#) on page 233

Outreach services policy tables control what options are available for fields in the Patron Status workform - Reader Services view and the Outreach Services Manager, and what items are eligible for selection list processing. You can work with the outreach services tables at the system, library, or branch levels.

Note:

These System Administration permissions are required to work with outreach services policy tables: **Access administration: Allow, Access tables: Allow, Modify outreach services tables: Allow.**

See the following topics:

- [“Setting Delivery Options”](#) on page 479
- [“Setting Outreach Patrons Options”](#) on page 484
- [“Setting Outreach Items Options”](#) on page 489
- [“Setting Up Reader Ratings”](#) on page 495

Setting Delivery Options

You set up delivery methods, routes, and stops in Polaris Administration to make these available as selections for outreach services patrons.

- **Delivery methods (modes)** - Each method you specify will appear as a selectable option in the Patron Delivery Options dialog box (Patron Status workform - Reader Services view), and as an option for filtering the patron list in the Outreach Services Manager when outreach services processing is done for multiple patrons. See [“Set outreach delivery mode options”](#) on page 479.
- **Delivery routes and stops along the routes** - Each route you specify will appear as a selectable option in the Patron Delivery Options dialog box (Patron Status workform - Reader Services view), and as an option for filtering the patron list in the Outreach Services Manager when outreach services processing is done for multiple patrons. See [“Set up outreach delivery routes”](#) on page 480.

1-2-3

Set outreach delivery mode options

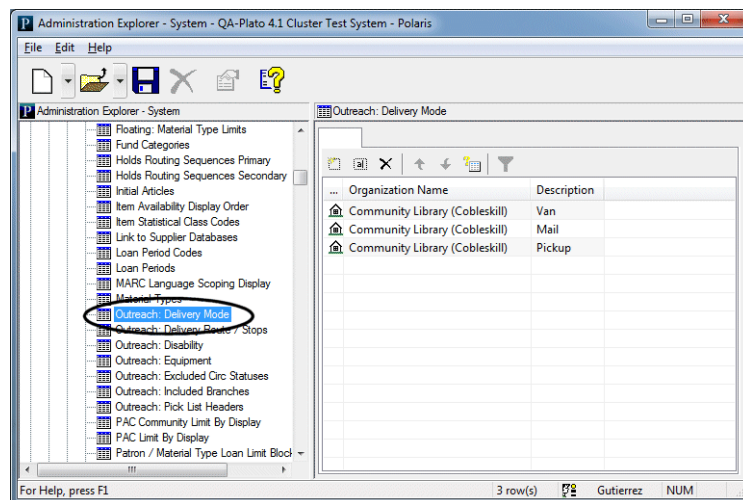
Follow these steps to set the possible methods by which your organization delivers items to outreach services patrons.

Note:

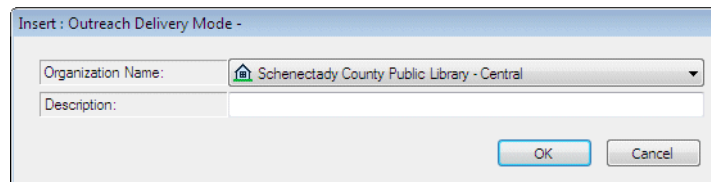
Your organization may allow a designated person to pick up items on behalf of the outreach services patron. If so, include a “pickup” delivery mode so that this option is available in the appropriate patron status records.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Outreach: Delivery Mode**.

The Outreach Delivery Mode table is displayed in the details view.



2. Click  to display the Insert Outreach Delivery Mode dialog box.



The dialog box titled "Insert : Outreach Delivery Mode -" contains two input fields. The "Organization Name:" field is a dropdown menu currently showing "Schenectady County Public Library - Central". The "Description:" field is a text box. At the bottom right are "OK" and "Cancel" buttons.

3. Select the branch in the **Organization Name** box.

Note:

If the Outreach Delivery Mode policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

4. Type the delivery method in the **Description** box.
5. Click **OK**.

The Outreach Delivery Mode table is displayed with the new entry. The status bar indicates that the modification is pending.

6. Select **File, Save** to save your changes.

The status bar indicates that the record is saved.

Related Information

- **Modify a table entry** - Select the entry and click .
- **Delete a table entry** - You can delete an entry only if it is not being used in a current patron record. Select the entry and click .

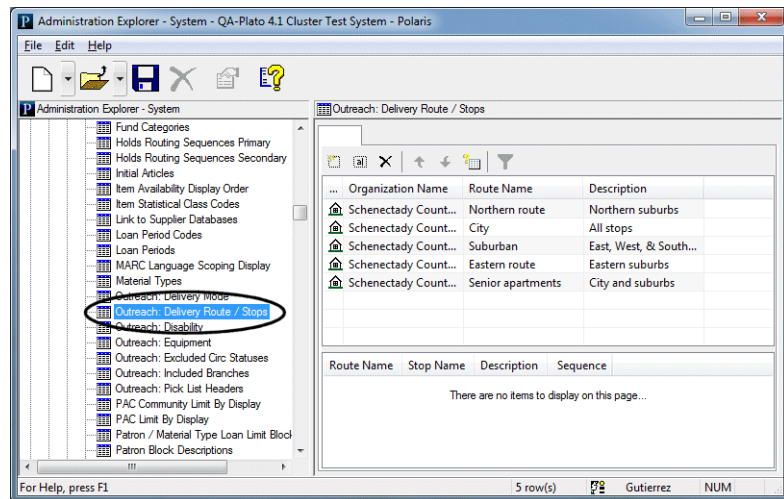
1-2-3

Set up outreach delivery routes

If you deliver items to outreach services patrons, you can set up delivery routes and specify stops along the routes. Follow these steps to set up outreach delivery routes.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Outreach: Delivery Route/Stops**.

The Outreach Delivery Route/Stops table is displayed in the details view.



2. To add a delivery route, follow these steps:

a) Click  with no existing route selected.

The Insert Delivery Route dialog box appears.

Insert: Outreach Delivery Route -

Organization Name: Schenectady County Public Library - Central

Route Name:

Description:

OK Cancel

b) Select the branch in the **Organization Name** box.

Note:

If the Outreach Delivery Route policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

c) Type a name for the route in the **Route Name** box.

d) Type a brief note or description of the route in the **Description** box.

e) Click **OK**.

The Outreach Delivery Route table is displayed with the new entry in the upper part of the table.

f) Select **File, Save**.

3. To add stops to a delivery route, follow these steps:

Note:

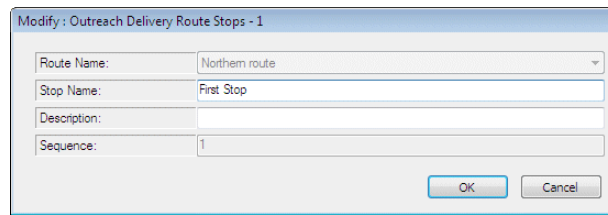
Each stop you specify will appear as a selectable option for the route in the Patron Delivery Options dialog box (Patron Status workform - Reader Services view).

a) In the upper part of the table, select the route you want to modify.

In the lower part of the table, one stop is listed for the route by default.

- b)** To modify the name and description of the default stop, select the stop in the lower part of the table and click .

The Modify Delivery Route Stops dialog box appears.



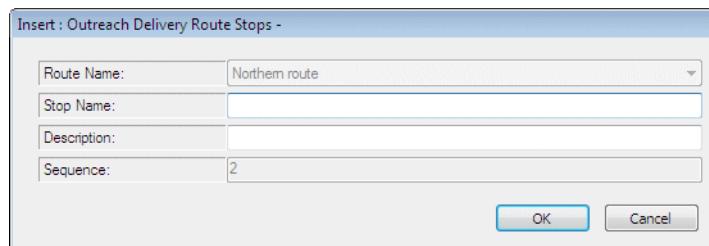
The dialog box titled "Modify : Outreach Delivery Route Stops - 1" contains the following fields:

- Route Name: Northern route (dropdown menu)
- Stop Name: First Stop (text field)
- Description: (empty text field)
- Sequence: 1 (text field)

Buttons: OK, Cancel

- c)** Type the name and description (optional) for the first stop, and click **OK**.
- d)** To add new stops to the route, select any line in the lower part of the table, and click .

The Insert Delivery Route Stops dialog box appears.



The dialog box titled "Insert : Outreach Delivery Route Stops -" contains the following fields:

- Route Name: Northern route (dropdown menu)
- Stop Name: (empty text field)
- Description: (empty text field)
- Sequence: 2 (text field)

Buttons: OK, Cancel

- e)** Type the name and description (optional) for the new stop, and click **OK**.
- f)** Type a brief note or description of the stop in the **Description** box.
- g)** Click **OK**.

The Outreach Delivery Route table is displayed with the new entry in the bottom part of the table. The status bar indicates that the modification is pending.

- h)** Continue to add stops to the route by repeating steps d-g.

4. To adjust the order of stops on a route, follow these steps:

- a)** Select the route in the upper part of the table.

The stops for the route are listed in the lower part of the table.

- b)** Select a stop and click  or  to move the stop earlier or later in the stop sequence.

5. Select **File, Save** to save your changes.

Related Information

- **Modify a table entry** - To modify a route, select an entry in the top portion of the table and click . To modify a stop along a route, select the route, then select the stop in the bottom portion of the table and click .
- **Delete a table entry** - You can delete an entry only if it is not being used in a current patron record. Select the entry and click .

Setting Outreach Patrons Options

You can set up the following patron options specifically for outreach services patrons:

- **Disability descriptions** - Each disability description you specify will appear as a selectable option in the Patron Preferences dialog box (Patron Status workform - Reader Services view). See [“Set outreach patron disability selections”](#) on page 484.
- **Equipment needs** - Each equipment description you specify will appear as a selectable option in the Patron Preferences dialog box (Patron Status workform - Reader Services view). See [“Set outreach patron equipment selections”](#) on page 486.

Note:

Disability and equipment needs descriptions are informational only, and do not affect what titles are selected for the patron or how they are delivered.

In addition, reading histories are automatically enabled for outreach services patrons because the system uses reading histories in processing selection lists for outreach services patrons. You can set limits on the length of time the history covers and the number of items it can contain that are separate from reading history limits for non-outreach services patrons. See [“Set reading history limits for outreach patrons”](#) on page 487.

1-2-3

Set outreach patron disability selections

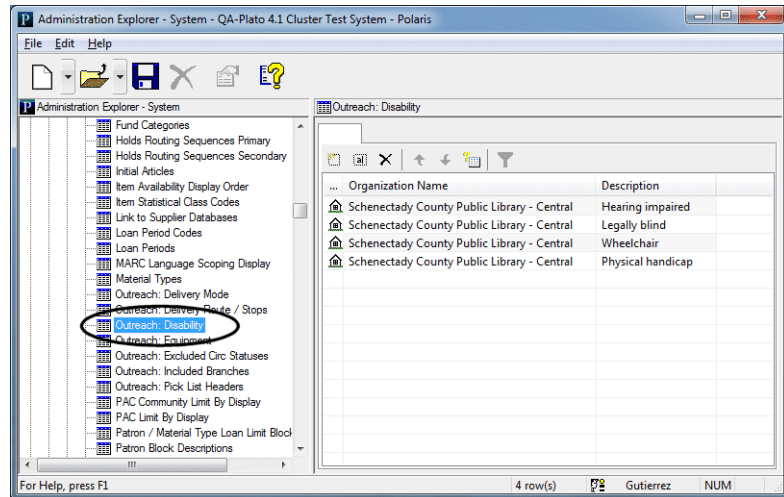
Follow these steps to set the options staff can select to note an outreach patron’s disability in the patron’s record.

Note:

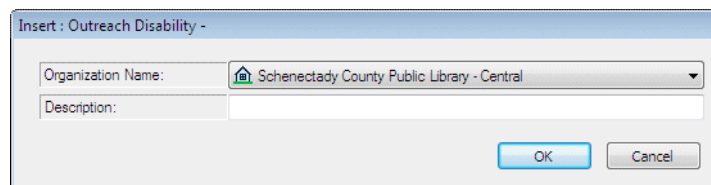
This table is optional and can be left empty. If you do not set up the table, no disability-related options are available for selection in the patron record.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Outreach: Disability**.

The Outreach Disability table is displayed in the details view.



2. Click  to display the Insert Outreach Disability dialog box.



3. Select the branch in the **Organization Name** box.

Note:

If the Outreach Disability policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

4. Type the disability selection in the **Description** box.
 5. Click **OK**.

The Outreach Disability table is displayed with the new entry. The status bar indicates that the modification is pending.

6. Select **File, Save** to save your changes.

The status bar indicates that the record is saved.

Related Information

- **Modify a table entry** - Select the entry and click .
- **Delete a table entry** - You can delete an entry only if it is not being used in a current patron record. Select the entry and click .

1-2-3

Set outreach patron equipment selections

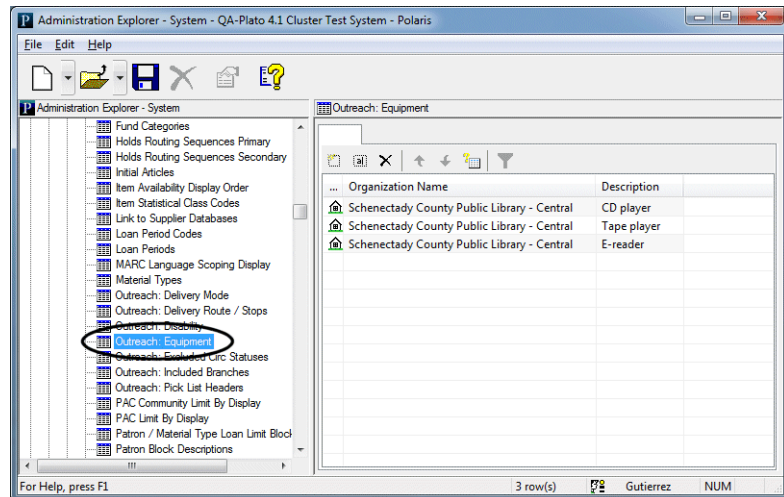
Follow these steps to set the options staff can select to specify a special equipment need for an outreach patron.

Note:

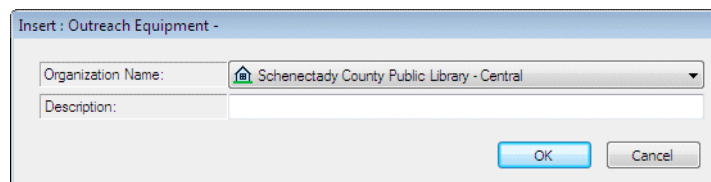
This table is optional and can be left empty. If you do not set up the table, no equipment options are available for selection in the patron record.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Outreach: Equipment**.

The Outreach Equipment table is displayed in the details view.



2. Click  to display the Insert Outreach Equipment dialog box.



3. Select the branch in the **Organization Name** box.

Note:

If the Outreach Equipment policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

4. Type the equipment selection in the **Description** box.
5. Click **OK**.

The Outreach Equipment table is displayed with the new entry. The status bar indicates that the modification is pending.

6. Select **File, Save** to save your changes.

Related Information

- **Modify a table entry** - Select the entry and click .
- **Delete a table entry** - You can delete an entry only if it is not being used in a current patron record. Select the entry and click .

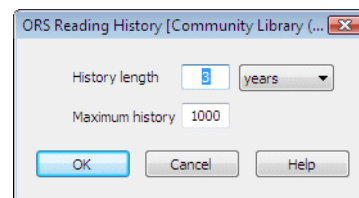
1-2-3

Set reading history limits for outreach patrons

Follow these steps to set limits on reading histories for outreach services patrons.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **ORS Reading history**.

The ORS Reading History dialog box appears.



3. Specify the length of time (from check-out date to current date) to retain an entry in the Reading History list by doing these steps:
 - a) Type the number of months or years in the first **History length** box.
 - b) Select the unit of time (months or years) in the second **History length** box.
4. In the **Maximum history** box, type the maximum number of entries that can be retained at one time in the Reading History list.

Note:

An entry's creation date in the reading history is usually, but not always, the check-out date. For example, offline uploads may cause some variation. Also, Polaris does not consider the exact time of check-out. If the **Maximum history value** is exceeded, and several items were checked out on the same date, Polaris deletes the items from the reading history in an unspecified order.

5. Click **OK** on the Reading History Setup dialog box.

Related Information

- **Reading history limits for non-outreach services patrons** - [“Setting Reading History Options”](#) on page 55.
- **Allow staff members to remove items from reading histories** - Staff members with the Circulation permission **Remove non-ORS patron histories: Allow** can remove individual items from the reading histories of non-outreach services patrons. Staff members with the Circulation permission **Remove ORS patron histories: Allow** can remove individual items from the reading histories of outreach services patrons. See [“Working with Reading Histories”](#) in the *Polaris Patron Services Guide 4.1R2* for details.
- **Reader ratings** - Staff members can enter title ratings on behalf of an outreach services patron in the patron’s reading history. See [“Setting Up Reader Ratings”](#) on page 495.
- **Links from bibliographic record** - Staff members with the Circulation permission **ORS: Link from bibliographic record: Allow** can select **Links, Outreach Patrons** in the Bibliographic Record workform to display a list of Outreach Services patrons who have items linked to the bibliographic record in their reading histories. See [“Link from a bibliographic record to outreach services patrons”](#) in the *Polaris Patron Services Guide 4.1R2*.

Setting Outreach Items Options

These settings control what items are candidates for selection list processing for outreach services patrons and the information that appears in the pick lists that are built from selection lists.

- **Excluded circulation statuses** - You can exclude items with specific statuses from selection list processing. For example, if you exclude items with a status of Bindery, no item with this status ever appears in a selection list as a “candidate” for the outreach patron’s pick list. See [“Set circulation statuses for outreach selection lists”](#) on page 489.
- **Branch items to include** - You can opt to include other branches’ items in selection list processing, and specify which branches to include. Or you can opt to restrict the candidate items to those belonging to the user’s workstation branch. See [“Set branch items to include in outreach selection lists”](#) on page 491.
- **Pick List column heads** - You can tailor the Outreach Services Pick List view to include the item data most useful for your organization’s workflow. See [“Set pick list column heads”](#) on page 493.
- **Prompt to update next service date at normal check-out** - You can display a prompt during normal check-out to update an active Outreach Services patron’s next service date if an item not on the patron’s pick list is checked out to the patron. See [“Prompt - update next service date at normal check out”](#) on page 494.

1-2-3

Set circulation statuses for outreach selection lists

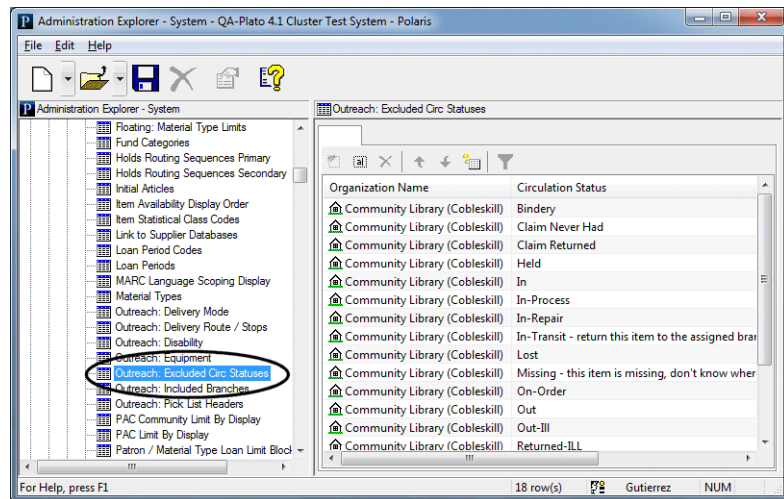
Follow these steps to set the item circulation statuses that should be excluded from outreach selection list processing.

Note:

By default, items with the following circulation statuses are excluded from selection list processing: Bindery, Claim Missing, Claim Never Had, Held, In-Repair, In-Transit, Lost, Missing, Transferred, Unavailable, Withdrawn.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Outreach: Excluded Circ Statuses**.

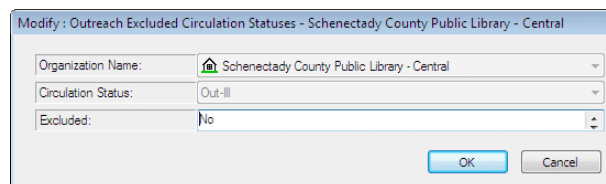
The Outreach Excluded Circ Statuses table is displayed in the details view.



For each organization, you can indicate whether a circulation status should be excluded from outreach selection lists (**Yes** in the Excluded column), or included in outreach selection lists (**No** in the Excluded column). You cannot add or delete entire circulation status entries.

2. To change the setting for a status, select the line entry and click , or double-click the entry.

The Modify Outreach Excluded Item Statuses dialog box appears.



3. Select **Yes** or **No** in the Excluded box, and click **OK**.

The Outreach Excluded Circ Statuses table is displayed with the new setting. The status bar indicates that the modification is pending.

4. Select **File, Save** to save your changes.

The status bar indicates that the record is saved.

1-2-3

Set branch items to include in outreach selection lists

The Outreach: Included Branches table works with the Patron Services parameter **ORS: Include other library items in selection list processing**. When the parameter is set to **Yes**, staff members can choose **Default branches** in the Selection List workform to include items belonging to all the libraries in the Included Branches table in selection list processing, or select any one of these branches from the drop-down list. However, if the parameter is set to **Yes** but no branches have been set in the Included Branches table, the **Default branches** option includes only the user's workstation branch. When the parameter is set to **No**, the Outreach: Included Branches table is ignored and only items belonging to the user's workstation branch are selection list candidates. Follow these steps to set the branch items that should be included in outreach selection list processing.

Note:

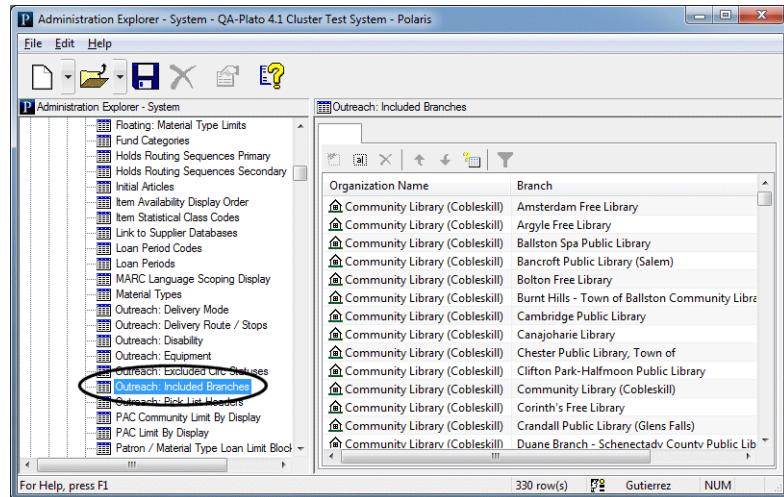
Included Branches processing can be manually overridden when building selection lists. When you use the Find Tool to search for a title to add to the selection list, the Find Tool searches all branches, not just included branches. When a title is manually added by this method, all items attached to the bibliographic record are returned as candidates to add to the pick list (not just those assigned to included branches). See ["Processing Outreach Services Items"](#) in the *Polaris Patron Services Guide 4.1R2*.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **ORS: Include other library items in selection list processing**, and set the parameter to **Yes**.
3. Select **File, Save** to save this change.
4. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Outreach: Included Branches**.

Note:

To better manage memory, a program-defined row limit determines whether this table can be opened at a specific organizational level. For example, if the table is opened at the system level and would require more than the limit (comprising entries from all branches) to be loaded, you will see a message advising you to open the table at a lower organizational level.

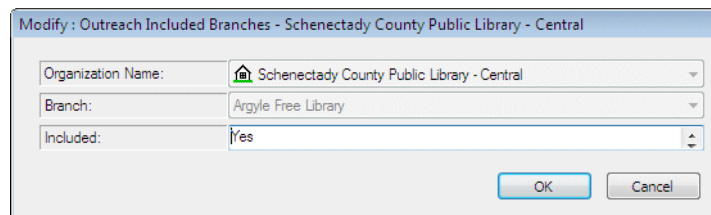
The Outreach Included Branches table is displayed in the details view.



For each organization, you can indicate whether items from a particular branch should be included in outreach selection lists (**Yes** in the Included column), or not considered in outreach selection lists (**No** in the Included column). You cannot add or delete entire table entries.

5. To change the Included setting for a branch, select the line entry and click , or double-click the entry.

The Modify Outreach Included Branches dialog box appears.



6. Select **Yes** or **No** in the **Included** box, and click **OK**.

The Outreach Included Branches table is displayed with the new setting. The status bar indicates that the modification is pending.

7. Select **File, Save** to save your changes.

The status bar indicates that the record is saved.

Related Information

Results set size - The maximum result set size for the Outreach Services selection list is controlled by the PowerPAC profile **Results set: Maximum number of records to return**. The default setting is 100,000. When the results set is returned, your settings for status and branch exclusions are applied, and the top 5,000 relevancy-ranked titles are returned.

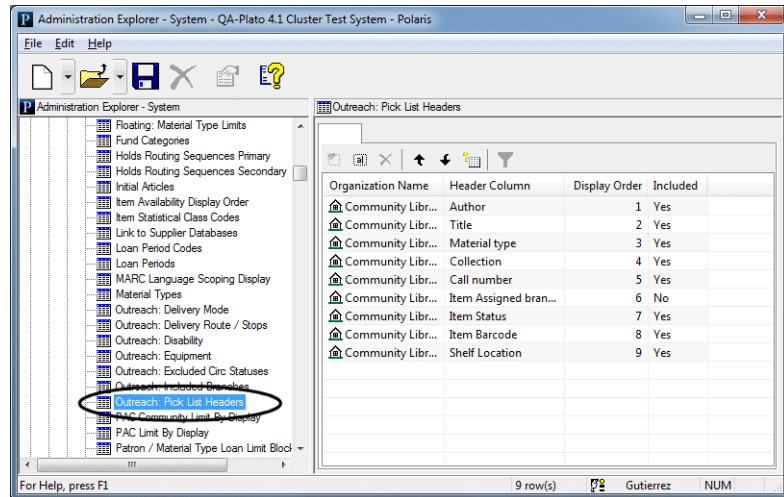
1-2-3

Set pick list column heads

Follow these steps to set the column heads for outreach services pick lists, and the order in which they appear on the workform.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Outreach: Pick List Headers**.

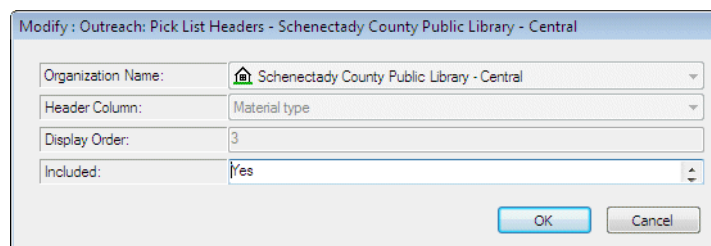
The Outreach Pick List Headers table is displayed in the details view.



You can indicate whether a column should be included in the pick list view of the workform (**Yes** in the Included column), or not included (**No** in the Included column), and you can modify the column display order. However, you cannot add or delete entire table entries.

2. To change the Included setting for a column, select the line entry and click , or double-click the entry.

The Modify Outreach Pick List Headers dialog box appears.



3. Select **Yes** or **No** in the **Included** box, and click **OK**.

The Outreach Pick List Headers table is displayed with the new setting. The status bar indicates that the modification is pending.

4. To change the order of columns in the pick list view, select an entry and click  or  to move the stop to the left or right.

The up arrow moves the column to the left. 1 indicates the first column on the left. The down arrow moves the column to the right.

5. Select **File, Save** to save your changes.

1-2-3

Prompt - update next service date at normal check out

You can choose to display a prompt during normal check out to update an active Outreach Services patron's next service date if the item is not on the patron's pick list. If the staff member chooses to update the next service date from the prompt, the patron's Next Service Date and Last Service Date are updated based on the Outreach Services delivery schedule set for that patron. If no prompt is displayed, or if the staff member chooses not to update the service date, the patron's next service date is not affected. The parameter is available at the system, library, and branch levels. The system uses the setting of the staff member's log-on branch. Follow these steps to set the prompt to display.

1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.
2. Double-click **ORS: Prompt for update during normal check-out**, and set the parameter to **Yes**.
3. Select **File, Save**.

Related Information

- **Setting service schedules** - See [“Set the outreach patron's delivery options”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Processing items from the patron pick lists** - See [“Processing Outreach Services Items”](#) in the *Polaris Patron Services Guide 4.1R2*

Setting Up Reader Ratings

Staff members with the Circulation permission **Modify ORS patron ratings: Allow** for the patron's registered branch can enter reader ratings submitted by Outreach Services patrons after the items have been returned. The staff member selects the item in the patron's Reading History list (Patron Status workform - Reader Services view) and enters the rating and related note, if any. Ratings already entered can also be modified. The Reading History list includes Rating and Note columns for outreach services patrons, where the rating number and any associated note are displayed. For more information about entering reader ratings, see ["Working with Reader Ratings"](#) in the *Polaris Patron Services Guide 4.1R2*.

Packing Lists

To gather the ratings, the staff member provides a printed packing list to the Outreach Services patron when the items are checked out to the patron. The list can be printed manually, or you can set the packing list to be printed automatically when the items are checked out from the patron's ORS Selection List or the Outreach Services Manager Pick List view. In this case, the list is printed in place of the check-out receipt. (A packing list can also be printed from the Patron Status workform - Items Out view for selected items that have already been checked out, if the patron is an Outreach Services patron.)

Note:

If items are checked out to an Outreach Services patron from the Check Out workform, the standard check-out receipt is printed.

The 8.5 x 11" packing list consists of the following elements:

- **Header** - The library name and any text you define. See ["Set up the packing list content and print method for reader ratings"](#) on page 497.
- **Date and time**
- **Patron data** - Patron's name, patron code, and last six digits of the patron barcode
- **Item data** - the complete call number, item material code, first 50 characters of the title, and the due date
- **Rating** - The text defined for the rating line. See ["Set up the packing list content and print method for reader ratings"](#) on page 497.
- **Total items**

1-2-3

Set up reader ratings

Follow these steps to enable reader ratings and set up the rating scale.

1. In the Administration Explorer tree view, open the **Parameters** folder for the system, and select the **Patron Services** tabbed page in the details view.
2. (System level only.) Double-click the Patron Services parameter **Outreach title rating**.

The Outreach Title Rating dialog box opens, where you define the 1-5 rating scale.

Rating	Description
1	
2	
3	
4	
5	

Highest: ☒ 1 ☐ 5

OK Cancel Help

3. Click the **Highest** value to indicate which end of the scale (1 or 5) is the most positive rating a title can receive.
4. Type a description (maximum of 50 characters) for each rating increment on the scale.
5. Click **OK**.
6. To enable reader ratings for individual organizations, open the **Parameters** folder for each organization and select the **Patron Services** tabbed page in the details view.

If all organizations will use reader ratings, you can set the parameter at the system level.

7. Double-click the Patron Services parameter **Outreach title rating**.
8. Double-click **Outreach title rating enabled**, and set the parameter to **Yes**.

1-2-3

Set up the packing list content and print method for reader ratings

Follow these steps to set up packing list printing.

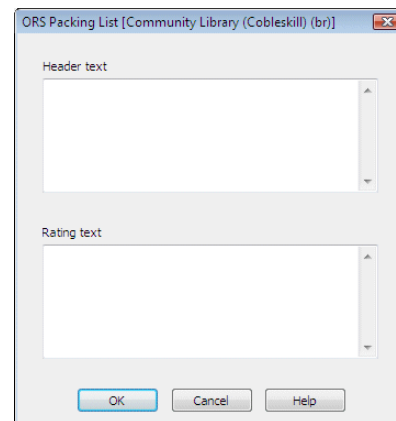
1. In the Administration Explorer tree view, open the **Parameters** folder for the organization, and select the **Patron Services** tabbed page in the details view.

Note:

Packing list text can be set at the system, library, and branch levels. For consistent results, you may want to specify the text at the system level.

2. Double-click **ORS packing list**.

The ORS Packing List dialog box opens.



3. Specify the header text and introductory rating text.

Each part can be 500 characters maximum; press **ENTER** to start a new line within the header or rating text. The header does not automatically include the library address and/or contact information in the header, so you may want to add this information. Other content is always included in the packing list; see [“Packing Lists”](#) on page 495.

4. Click **OK**.
5. To set the packing list to print automatically at check-out, double-click the Patron Services parameter **ORS automatically print packing list**, and set the parameter to **Yes**.

If the parameter is set to **Yes**, the packing list is printed automatically when the items are checked out from the patron’s ORS Selection List or the Outreach Services Manager Pick List view. In these cases, the list is printed in place of the check-out receipt. (A packing list can also be printed from the Patron Status workform - Items Out view for selected items that have already been checked out, if the patron is an Outreach Services patron.) If the parameter is set to **No**, a staff member must print the packing list.

6. Select **File, Save**.

Setting Up Course Reserves



Your Polaris system may include course reserve functions to serve an academic community. With these features, you can place materials on reserve for use in a class during a semester or term. Reserve materials can be drawn from the regular collection, instructors may bring in personal material to be placed on reserve, or the materials may be temporary items such as photocopies. Course reserve records store information about the courses for which items are placed on reserve.

Polaris handles the reserved items through reserve item “records,” which are views of Polaris item records for materials placed on reserve. The reserve item record carries its own circulation parameters, which may be different from those in effect if an item is taken off reserve and returned to the circulating collection. Circulation statistics for reserve items are also kept separately. Staff and patrons can search for reserve materials from the staff client and the PAC. For more information about course reserve workflows, see [“Managing Course Reserves”](#) in the *Polaris Patron Services Guide 4.1R2*.

In Polaris Administration, you set up course reserve data tables that supply the options for fields such as course name, school, department, and term dates in the course reserve record. Additional course reserve parameters enable course reserve functions, and control the default settings for reserve item records.

Note:

Polaris course reserve functions are available by specific contract. If your Polaris installation does not include Polaris course reserves, the features described in this unit are not available.

See the following topics:

- [“Setting Course Reserve Tables”](#) on page 499
- [“Setting Course Reserve Options”](#) on page 507

Setting Course Reserve Tables

Course Reserve policy tables control what options are available for fields in the Course Reserve record as follows:

- **Course Reserves: Course names** - Associates the organizations (branches) with the course numbers, section numbers, course names, and course abbreviations for which the branches handle course reserves.
- **Course Reserves: Course terms** - Associates the organizations (branches) with the course terms, course start dates, and course end dates for which the branches handle course reserves.
- **Course Reserves: Departments** - Associates the organizations (branches) with the academic departments for which the branches handle course reserves.
- **Course Reserves: School/Divisions** - Associates the organizations (branches) with the academic schools or divisions for which the branches handle course reserves.

You can add, change, or delete items from the course reserves tables at the system, library, or branch levels.

Note:

These System Administration permissions are required to work with Course Reserve tables: **Access administration: Allow**, **Access tables: Allow**, **Modify Reserve Tables: Allow**.

1-2-3

Add courses for course reserves

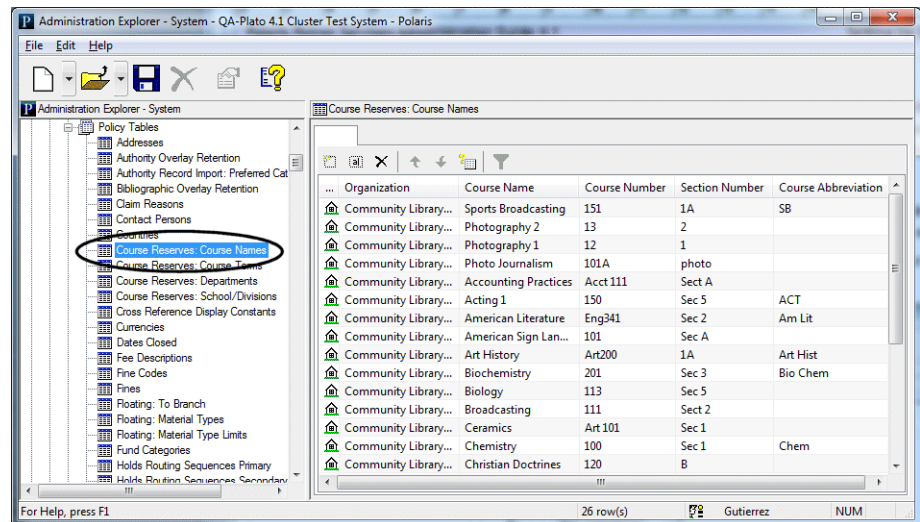
When you add courses, you associate each course entry with a branch organization, and specify more detailed identification information about each course. Follow these steps to add individual courses to the Course Names table.

Tip:

You can set up one or two “dummy” courses to accommodate special situations. For example, a library may put valuable or special items on permanent reserve behind the circulation desk. You might name the “course” for these items **CircDesk**. Although they are not reserved for an actual course, you can use course reserve functionality to control their circulation.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Course Reserves: Course names**.

The Course Names table is displayed in the details view.



2. Click  to display the Insert Course Names dialog box.

3. Select the branch in the **Organization Name** box.

Note:

If the Course Names policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

Tip:

Omit initial articles (A, An, The) from the course name. Unlike most searches in Polaris, if the course name begins with an article (A, An, The), you must include the article or use a wildcard character in the Polaris Find Tool search term.

4. Type the appropriate values in the **Course Name**, **Course Number**, **Section Number**, and **Course Abbreviation** boxes.

The course number, section number, and course abbreviation are optional. Each value you specify will appear as a selectable option in the course reserve record workform. See the following examples:

- If a course is always identified by a unique name and number combination, you can set up the table entry so that selecting the course name in the course reserve record workform always provides the correct course number.

Example:

For a course listed as CIS631 Computer and Network Security, add one Course Name table entry with these values:

Course Name: Computer and Network Security

Course Number: CIS631

When the course reserve record is set up for this course, selecting the name provides the correct number in the course number field.

- If courses are listed with common names but unique numbers, you may want to add separate entries for each name/number combination.

Example:

Courses are listed as English 101, English 102, and English 103. Add three Course Name table entries with these values:

(Entry 1)

Course Name: English

Course Number: 101

(Entry 2)

Course Name: English

Course Number: 102

(Entry 3)

Course Name: English

Course Number: 103

When the course reserve records are set up for these courses, the staff member selects the course name **English**, then selects the course number from the options **101**, **102**, or **103**.

- Alternatively, you can make the course number part of the name itself, and leave the number blank.

Example:

Courses are listed as English 101, English 102, and English 103. Add three Course Name table entries with these values:

(Entry 1)

Course Name: English 101

Course Number: (leave blank)

(Entry 2)

Course Name: English 102

Course Number: (leave blank)

(Entry 3)

Course Name: English 103

Course Number: (leave blank)

When the course reserve records are set up for these courses, the staff member selects the course name **English 101**, **English 102**, or **English 103**. There are no course numbers to select.

5. Click **OK**.

The Courses table list is displayed with the new entry. The status bar indicates that the modification is pending.

6. Select **File, Save** to save your changes.

The status bar indicates that the record is saved.

Related Information

- **Modify a table entry** - Select the entry and click .
- **Delete a table entry** - You can delete an entry only if it is not being used in a current course reserve record. Select the entry and click .
- **Add table entries from a new course reserve record** - Course names, course numbers, section numbers, and course abbreviations can also be added to the Course Names table from the Course Reserve workform in the staff client, by entering the information in the Add New Course Information dialog box. The information is added to the Course Names table for the branch that owns the course reserve record, and to the Course Names table at the system level. For more information, see [“Setting Up Course Reserve Records”](#) in the *Polaris Patron Services Guide 4.1R2*.
- **Specify the default search field for PAC course reserve searches** - See [“Specifying Default Search Settings”](#) in the *Polaris Public Access Administration Guide 4.1R2*.

1-2-3

Add course schedule information for course reserves

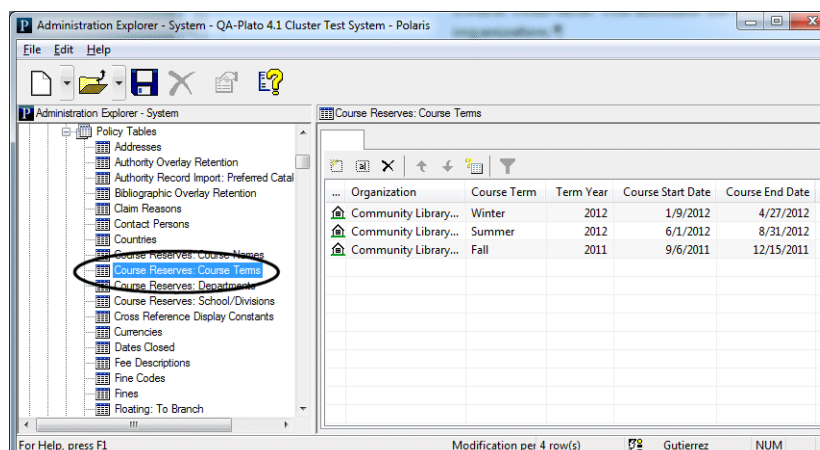
Follow these steps to add course terms and dates to the Course Reserves: Course Term table. You associate the schedule entries with a branch organization.

Important:

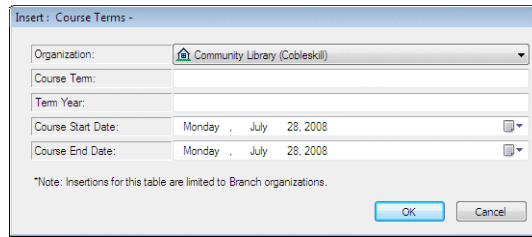
Add appropriate course terms, years, start dates, and end dates to this table at regular intervals (for example, annually).

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Course Reserves: Course terms**.

The Course Terms table is displayed in the details view.



2. Click  to display the Insert Course Terms dialog box.



Insert : Course Terms -

Organization: Community Library (Cobleskill)

Course Term:

Term Year:

Course Start Date: Monday, July 28, 2008

Course End Date: Monday, July 28, 2008

*Note: Insertions for this table are limited to Branch organizations.

OK Cancel

3. Select the branch in the **Organization Name** box.

Note:

If the Course Terms policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

4. Type a term name (such as **Fall** or **Spring**) in the **Course Term** box.
5. Type a four-digit year (such as **2012**) in the **Term Year** box.

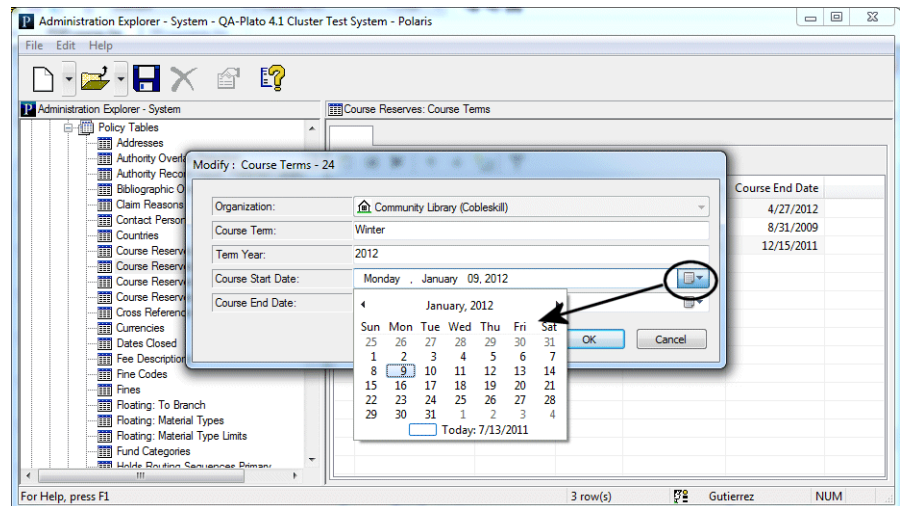
Note:

The **Course Term** and **Term Year** values together provide an option that a staff member can select when creating a course reserve record. For example, if you create an entry for **Fall 2012** in the Course Terms table, a staff member can choose this value to identify a course in a course reserve record.

6. Set the course start date:

- a) Click the calendar icon on the **Course Start Date** box.

The calendar appears.



Administration Explorer - System - QA-Plato 4.1 Cluster Test System - Polaris

File Edit Help

Administration Explorer - System

Policy Tables

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Fine Codes

Fines

Floating: To Branch

Floating: Material Types

Floating: Material Type Limits

Fund Categories

Holdings: Routing Sequences Primary

Course Reserves: Course Terms

Modify : Course Terms - 24

Organization: Community Library (Cobleskill)

Course Term: Winter

Term Year: 2012

Course Start Date: Monday, January 09, 2012

Course End Date:

January, 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Today: 7/13/2011

OK Cancel

Course End Date

4/27/2012

8/31/2009

12/15/2011

For Help, press F1

3 row(s)

Gutierrez

NUM

- b) Click the month arrows until the month for the start date appears.
- c) Click the date on which the course starts.

The Start Date calendar closes.

7. Set the course end date (must be after the course start date):

- a)** Click the calendar icon on the **Course End Date** box.

The calendar appears.

- b)** Click the month arrows until the month for the end date appears.

- c)** Click the date on which the course ends.

The End Date calendar closes.

8. Click **OK** in the dialog box.

The Course Term table is displayed with the new entry. The status bar indicates that the modification is pending.

9. Select **File, Save** to save your changes.

The status bar indicates that the record is saved.

Related Information

- **Modify a table entry** - Select the entry and click .
- **Delete a table entry** - You can delete an entry only if it is not being used in a current course reserve record. Select the entry and click .

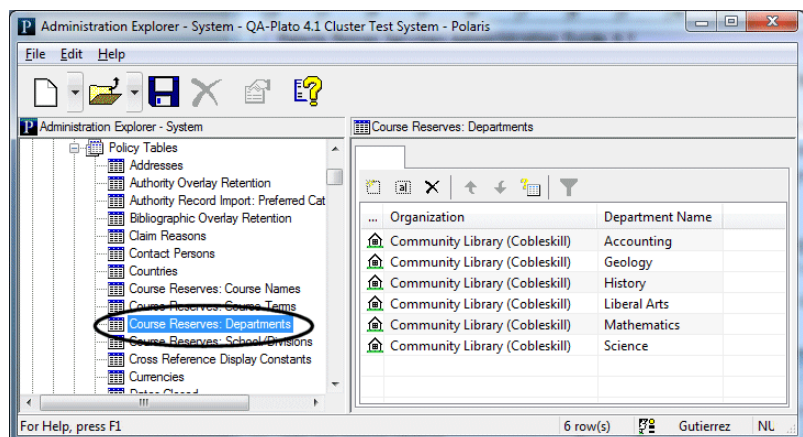
1-2-3

Add departments for course reserves

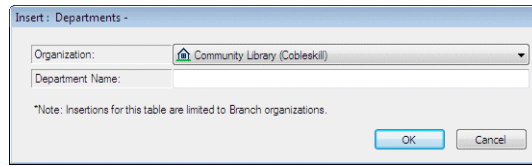
Follow these steps to add academic departments to the Course Reserves: Departments table. You associate each department entry with a branch organization.

- 1.** In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Course Reserves: Departments**.

The Departments table is displayed in the details view.



2. Click  to display the Insert Departments dialog box.

The dialog box is titled "Insert : Departments -". It contains two input fields: "Organization:" with a dropdown menu showing "Community Library (Cobleskill)" and a home icon, and "Department Name:" with a text input field. Below the fields is a note: "*Note: Insertions for this table are limited to Branch organizations." At the bottom right are "OK" and "Cancel" buttons.

3. Select the branch in the **Organization Name** box.

Note:

If the Course Departments policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

4. Type the name text in the **Department Name** box, and click **OK**.

The **Department Name** list is displayed with the new entry. The status bar indicates that the modification is pending.

5. Select **File, Save** to save your changes.

The status bar indicates that the record is saved.

Related Information

- **Modify a table entry** - Select the entry and click .
- **Delete a table entry** - You can delete an entry only if it is not being used in a current course reserve record. Select the entry and click .

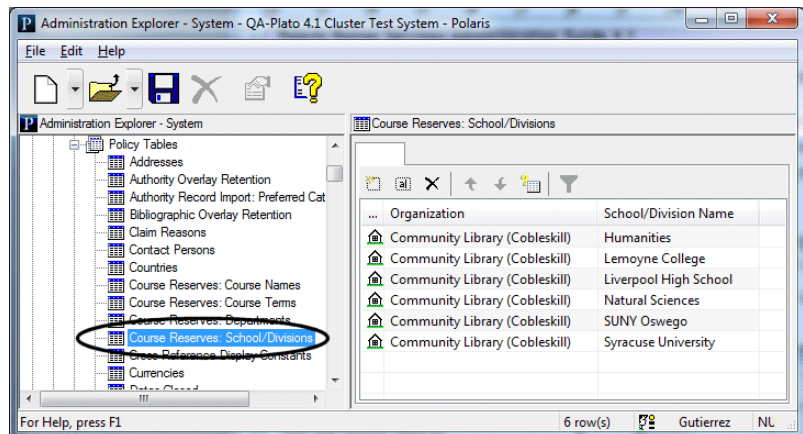
1-2-3

Add schools/divisions for course reserves

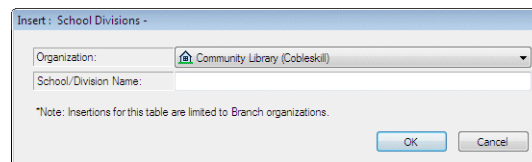
Follow these steps to add schools or divisions to the Course Reserves: School/Divisions table. You associate each school or division entry with a branch organization.

1. In the Administration Explorer tree view, open the **Policy Tables** folder for the organization, and select **Course Reserves: School/Divisions**.

The School/Divisions table is displayed in the details view.



2. Click  to display the Insert School Divisions dialog box.



3. Select the branch in the **Organization Name** box.

Note:

If the School/Divisions policy table is opened at the branch level, only the branch name is displayed in the **Organization** list.

4. Type the name text in the **School/Division Name** box, and click **OK**.
The **School/Divisions** table list is displayed with the new entry. The status bar indicates that the modification is pending.
5. Select **File, Save** to save your changes.

Related Information

- **Modify a table entry** - Select the entry and click .
- **Delete a table entry** - You can delete an entry only if it is not being used in a current course reserve record. Select the entry and click .

Setting Course Reserve Options

Course reserve options control the default settings for the reserve item “record,” which stores circulation, status, and disposition information about an item that has been placed on course reserve. The default values for the reserve item record can be different from those used in the equivalent (non-reserved) item record. For example, when an item is placed on reserve, the default loan period and fine code can be different from the values set for the same item when it is in the library’s circulating (non-reserve) collection.

You set reserve item defaults with the Patron Services parameter **Course reserve options**, which you can access from the Administration Explorer or an organization workform. Course reserve options are available at the system, library, and branch levels.

1-2-3

Set default values for reserve items

Follow these steps to set the default values for reserve item records.

1. In the Administration Explorer tree view, open the Parameters folder for the organization.
2. Click the **Patron Services** tab in the details view.
3. Double-click **Course reserve options** to display the Course Reserve Options dialog box.

4. Select the default assigned branch for reserve item records from the **Assigned branch** list.
5. To include default collection information in the reserve item record, select a collection in the **Assigned collection** list. The list includes all collections defined for the assigned branch.
6. To include default shelf location information in the reserve item record, select a location in the **Shelf location** list. The list includes all shelf locations defined for the assigned branch.

7. Select a default loan period in the **Loan period code** list.
8. Select a default fine code in the **Fine code** list.
9. Select a default renewal limit in the **Renewal limit** list. If you do not ordinarily allow renewals on reserve items, select **0**.
10. Select (check) **Holdable** if hold requests are allowed on most reserve items.
11. Designate the default owner of reserve items:
 - Select **Library** if most reserve items are drawn from the library's collection.
 - Select **Instructor** if instructors supply most reserve items.
12. Select the default action to take when a reserve item is taken off reserve:
 - **Discard** - Indicates that the item should be discarded when it is taken off reserve. You may wish to use this option if most of your reserve items are photocopies or temporary materials provided by the instructor.
 - **Return item to collection** - Indicates that the item should return to the library's circulating (non-reserve) collection when it is taken off reserve. This option is available only if **Library** is the selected copy owner.
 - **Return to owner** - Indicates that an item should be returned to the instructor when it is taken off reserve. This option is available only if **Instructor** is the selected copy owner.
 - **Auto-delete** - Automatically deletes the item record (and the associated bibliographic record, if appropriate) when an item is taken off reserve. If most of your reserve items are instructor-owned, and you are therefore creating temporary item records for them when they are placed on reserve, you may wish to select this option. This option is available only if **Discard** or **Return to Owner** is selected.
13. If most of your reserve items are photocopies, select a copyright compliance option:
 - **CCG** (compliance with copyright guidelines) - Use this option for photocopied journal articles if the article is dated within the last five years, *and* your library does not own the journal title, *and* this is the fifth or fewer request made for this item within the current calendar year.
 - **CCL** (compliance with copyright law) - Use this option for all other photocopies; for example, if the article is older than five years, *or* your library owns the journal title, *or* this is the sixth or greater request within the calendar year and if your library is paying royalties to the Copyright Clearance Center or a document delivery vendor.

Note:

Select **None** if most reserve items are not photocopies.

14. Select (check) **Library use only** if most reserve items should not be removed from the library.
15. Select (check) **Requires full cataloging** if most reserve items need further cataloging. This option is available only if **Library** is the selected copy owner.
16. Select (check) **Purchase** to indicate that the library may wish to purchase copies of most reserve items, if they are instructor-owned, or additional copies of library-owned items.

Note:

This option sets an indicator in the reserve item record. It does not initiate automatic purchase order functions.

17. Select (check) **Copyright fee required** if a copyright fee is required for most reserve items.
18. Click **OK**.
19. Select **File, Save** to save any changes.

Related Information

- **Reserve collections** - Branches that deal with extensive course reserves may want to set up reserve collections. For more information about setting up collections, see [“Working with Collections”](#) in the *Polaris Administration Guide 4.1R2*.
- **Limit the number of reserve items a patron can check out** - See [“Defining Loan and Request Limit Blocks”](#) on page 332.
- **Instructor information** - Information about instructors in course reserve records derives from linked patron records for the instructors. For more information, see [“Creating and Editing Patron Records”](#) in the *Polaris Patron Services Guide 4.1R2*.

Circulation Permissions Reference

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

Note:

For more information about setting circulation permissions, including the combinations of permissions needed for specific workflows, see ["Setting Circulation Permissions"](#) on page 6.

For general information about setting permissions in Polaris, see ["Granting Permissions"](#) in the *Polaris Administration Guide 4.1R2*.

For information about System Administration permissions related to circulation, see ["Setting Administration Permissions"](#) in the *Polaris Administration Guide 4.1R2*.

Access bookmobile (System)	Retrieve transaction files created during offline operations. • Allow: Open the Bookmobile workflow. This workflow is used to select and upload offline transaction files.
Access circulation control (System)	Check in materials, check-out materials, process holds or ILL requests, and accept fee and fine payments. • Allow: Open the Circulation menu on the Polaris Shortcut Bar.
Access Credit Card Payments Manager (System)	Work with the Credit Cards Payments Manager to view transactions and refund payments. • Allow: Open the Credit Cards Payments Manager (Utilities menu, Polaris Shortcut Bar).
Access hold request manager (System)	Processing and manage hold requests. • Allow: Open and use the Holds view on the Request Manager workflow.
Access ILL request manager (System)	Process and manage interlibrary loan requests. • Allow: Open and use the ILL view on the Request Manager workflow.
Access notice history (Branch)	View the notification history for a specific item. • Allow: Open the Notice History dialog box from the Patron Status workflow - General view and from item list views on other Patron Status views.
Access patron record bulk change (System)	Change multiple patron records. To change records for a specific Registered at branch, a user also needs the permission Patron registration: Modify for that branch. • Allow: Use the Bulk Change option on the Record Set workflow Tools menu.

Access patron services (System)	Register patrons and manage patron records and services. • Allow: Open the Patron Services menu on the Polaris Shortcut Bar.
Circulation check-in workform (System)	Access specific views of the Check In workform. • Access Bulk mode: Do bulk check-in operations. • Access In-House mode: Check in items that were used in-house but did not circulate outside the library. • Access Inventory mode: Take item inventory. • Access Normal mode: Check in items at the circulation desk.
Close ExpressCheck (System)	Exit the Polaris® ExpressCheck™ application at a Polaris ExpressCheck self-check workstation. For more information, see the <i>Polaris ExpressCheck Administration Guide</i> . • Allow: Exit the application.
Create a patron account credit (System)	Accept overpayments from patrons. • Allow: Post credits to patron accounts.
Create on-the-fly records (System)	Create brief bibliographic and item records during check-out. • Allow: Do express cataloging during check-out.
Create patron associations (System)	Link patron records. • Allow: Open the Associations view on the Patron Status workform.
Create, return or forfeit a patron account deposit (System)	Work with deposits in a patron account (Patron Status workform - Account view). • Allow: Create, return, or forfeit a patron's deposit.
Delete patron associations (System)	Remove the links between patron records. • Allow: Use the Delete option in the Associations view of the Patron Status workform.
Delete patron message (System)	Remove a posted message from a patron record. Patrons can read and delete these messages online, from the PAC patron account. • Allow: Use the Delete message option in the Notes view of the Patron Status workform.
Delete photo IDs (System)	Work with patron photos. • Allow: On the Patron Registration workform - Patron Photo view, delete a patron photo.
Display hold-request queues (System)	Process hold requests at any library or branch. • Allow: Display the Holds Queue workform.

Fines: Allow credit card payments (System)	(For libraries with a staff client license for PayPal Payflow credit card processing.) Select Credit Card as a payment method and input credit card information in staff client workflows where payment is accepted for fines and fees. • Allow: Displays the Credit Card Payment dialog box when Credit Card is selected and staff member clicks OK on the Pay dialog box.
Fines: Allow refunds (System)	(For libraries with a staff client license for PayPal Payflow Pro credit card processing.) Issue credits on credit card accounts. • Allow: Refund one or all payments from the Store Order workform or the Patron Status workform - Account view.
Fines: override 2nd level fine block (System)	Allow a patron with fines over the second-level fine limit to check out. • Allow: Override the second-level fine block. Typically, this permission is given to supervisory staff members.
Fines: pay fines at circ (System)	Pay a patron's fines during check-out, renewal, check-in, or declaring an item lost. • Allow: Use the Pay command on the Fines Block dialog box.
Fines: waive fines at circ (System)	Waive a patron's fines during check-out. • Allow: Use the Waive command on the Fines Block dialog box.
Hold requests (Branch)	Every branch that processes hold requests must assign the following permissions for the branch: • Access: List and display hold requests originating at the branch. • Create: Create hold requests originating at the branch. • Delete: Delete hold requests that originated at the branch. • Deny item request: Reject filling a hold request with items owned by the branch. • Modify: Change existing hold requests. • Modify PAC display note: Edit the PAC display note in the Hold Request workform. Patrons can read this note in the PAC patron account. • Allow: Add or modify text in the PAC display note field on the Hold Request workform - Notes view.
ILL requests (Branch)	Every branch that handles interlibrary loan requests must assign the following permissions for the branch: • Access: List and display loan requests originating from the branch. • Convert holds: Convert a hold request to an interlibrary loan request. This permission allows a staff member to decide if a hold request can be filled from a library outside of the library system. • Delete: Delete interlibrary loan requests that originated at the branch. • Modify: Change existing loan requests.

Manage item dialogs (System, Library, Branch)	These permissions allow circulation staff to change specific aspects of selected item records from the Check In workform, without accessing the records and without necessarily having permission to modify specific item record views. The items must belong to the logged-in workstation's branch and have a status of In. • Modify assigned collection: Change item's collection • Modify barcode: Change an item's barcode (cannot be changed to a blank). • Modify blocks: Change library-assigned and free-text blocks on an item • Modify circulation status: Change item status from In to In-repair, Unavailable, or Bindery • Modify material type: Change item's material type • Modify notes: Change item's non-public note • Modify shelf location: Change an item's shelf location to another shelf location. The shelf location options are those available to the logged-in workstation's branch. • Withdraw items: Change item status from In to Withdrawn
Merge patrons (System)	Merge information from the secondary patron record into the primary patron record and delete the secondary record. • Allow: Use the Patron Merge dialog box available from the Tools menu on the Patron Registration workform.
Modify due date and time (System)	Set a special due date and time during check-out. • Allow: Use the Special Loan dialog box available from the Special command on the Check Out workform.
Modify fine amount (System)	Change the amount of the fine due when an overdue item is checked in or renewed. • Allow: Type a new fine amount in the Overdue Fine dialog box.
Modify free days (System)	Change the default number of free days (days exempt from overdue fines) when an item is checked in at normal, bulk, or offline check-in. • Allow: Type a new number of days in the Free days box (check-in workform).
Modify hold queues (System)	Change the position of a hold request in the holds queue. • Allow: Change the list of hold requests on the Holds Queue workform.
Modify lost item amount (System)	Change the amount of the replacement charge or processing fee in the Declare Lost Item dialog box, which appears when you declare an item lost. • Allow: Type new amounts in the Declare Lost Item dialog box.

Modify ORS patron ratings (System, Library, Branch)	Add or modify reading ratings submitted by outreach services patrons. • Allow: Select items from the Reading History list (Patron Status workform - Reader Services view) and add or modify the patron's ratings for the items, including notes.
Modify patron associations (System)	Maintain associations between patrons. • Allow: Make and save changes to the Associations view on the Patron Status workform.
Modify photo IDs (System)	Work with patron photos. • Allow: On the Patron Registration workform - Patron Photo view, add or replace a patron photo.
Modify receipt message text (System)	Change the message on check-out and fine receipts. • Allow: Edit and save the message text on the Receipt Printer Options tabbed page (Circulation, Options on the Shortcut Bar).
Modify renewal period (System)	Set a special renewal loan period for a checked-out item. • Allow: Use the Special Loan dialog box available from the Special Renew command on the Items Out view of the Patron Status workform.
ORS: Link from bibliographic record (System)	From a bibliographic record, display a list of Outreach Services patrons whose reading histories include items linked to the bibliographic record. (Outreach Services must also be licensed for staff member's logged-on workstation.) • Allow: Select Links, Outreach Patrons in the Bibliographic Record workform, or right-click a bibliographic record in Find Tool search results and select Links, Outreach Patrons, to display the list of linked patrons.
Outreach Services Manager (Branch)	Process outreach services for multiple patrons. • Access: Open the Outreach Services Manager workform.
Override associated patron block (System)	Continue a check-out or renewal operation to a patron with associated patrons that blocked. Both this permission and the permission to override the specific block are required to continue check out. • Allow: Bypass the block at check-out or renewal when an associated patron record is blocked.
Override claimed item limits (System)	Continue a check-out or renewal operation to a patron who has exceeded the current claims or total claimed items limit. • Allow: Bypass the block at check-out or renewal.
Override collection agency block (System)	Continue a check-out or renewal operation when a patron is blocked because the patron's account has been reported to a collection agency. • Allow: Bypass the collection agency block at check-out or renewal.

Override invalid patron barcode message (System)	Continue to save a patron record when an invalid barcode message is displayed. • Allow: Click Yes on the invalid barcode message and save the record without displaying a permission block message (supervisor override not required to save record)
Override item assigned blocks (System)	Continue a check-out or renewal operation when the item has library-assigned blocks. • Allow: Bypass the block at check-out or renewal.
Override item free-text blocks (System)	Continue a check-out or renewal operation when the item has a free-text block. • Allow: Bypass the block at check-out or renewal.
Override item limit blocks (System)	Continue a check-out or renewal operation when the item exceeds the limit for items out by material type, total items out, material type group, or reserve items out. • Allow: Bypass the block at check-out or renewal.
Override non-circulating blocks (System)	Continue a check-out operation when the non-circulating option is specified in the item record, 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 for the material type is set to 0 units in the Loan Periods policy table. • Allow: Bypass the block at check-out (any workform where check-out can be performed)
Override overdue limit (System)	Continue a check-out or renewal operation to a patron who has exceeded the limit for overdue or long overdue items • Allow: Bypass the block at check-out or renewal.
Override patron assigned blocks (System)	Continue a check-out or renewal operation to a patron who has a library-assigned block on the patron record • Allow: Bypass the block at check-out or renewal.
Override patron blocking note (System)	Continue a check-out or renewal operation to a patron who has a blocking note on the patron record • Allow: Bypass the block at check-out or renewal.
Override patron free-text blocks (System)	Continue a check-out or renewal operation to a patron who has a free-text block on the patron record • Allow: Bypass the block at check-out or renewal.
Override renewal limit blocks (System)	Continue a renewal operation when the number of renewals allowed for an item would be exceeded. • Allow: Bypass the block at renewal (Check Out workform; Patron Status workform - Items Out view)

Override request blocks (System)	Bypass a patron or item block that may occur while requesting a hold. • Allow: Bypass a block while a hold request is being created. Note: These additional permissions are necessary to work with requests: Patron Status - Access (Patron Services); Bibliographic Records - Access (Cataloging); Item Records - Access (Cataloging).
Override request limits (System)	Continue a check-out or renewal operation to a patron who has exceeded the total request limit, a request limit by material type, or the ILL request limit • Allow: Bypass the block at check-out or renewal.
Patron claims: Reset total claim count: Allow (System)	On the Patron Status workform - Claims view, reset a patron's total (lifetime) claims to 0.
Patron record sets (System, Library, Branch)	All organizations that own patron record sets must assign the following permissions for the organization: • Access: List and open patron record sets owned by the organization. • Create: Create new patron record sets for the organization. • Delete: Delete patron record sets owned by the organization. • Modify: Change existing patron record sets owned by the organization.
Patron registration (Branch)	Every branch must assign the following permissions concerning records for patrons registered at the branch: • Access: List and open patron registration records owned by the branch. • Create: Specifies who can register new patrons at the branch. • Create express registration record: Register a patron during a check-out operation at the branch. • Delete: Delete patron registration records owned by the branch. • Modify: Maintain existing patron registration records for the branch. To modify patron records via bulk change, the user also needs the system-level permission Access patron record bulk change. • Modify postal address fields: In a patron record, enter a city, state/country/postal code combination that does not already exist in the system postal codes table (new combination is added to the postal codes table when record is saved). • Override blocks to delete: Bypass blocks for breakable links, such as existing notes or fines, when deleting a patron registration record owned by the branch.

Patron status (Branch) Every branch must assign the following permissions concerning accounts for patrons registered at the branch. These permissions allow a branch to limit access to private patron information.

- **Access:** Open the Patron Status workflow for records owned by the branch.
- **Access notice history:** Open the notice history for any item listed in item listviews on the Patron Status workflow.
- **Access patron account:** Open the Account view on the Patron Status workflow.
- **Access patron account: transaction summary:** Display the Transaction Summary dialog box from the Account view on the Patron Status workflow.
- **Create/delete patron blocks:** Add or remove blocks on the General view of the Patron Status workflow.
- **Display associations:** Open the Associations view on the Patron Status workflow.
- **Display claimed items:** Open the Claims view on the Patron Status workflow.
- **Display hold request list:** Open the Holds view on the Patron Status workflow.
- **Display items checked-out:** Open the Items Out view on the Patron Status workflow.
- **Display notes:** Open the Notes view on the Patron Status workflow.
- **Display patron blocks:** Open the General view on the Patron Status workflow.
- **Display reader services:** Open the Reader Services view on the Patron Status workflow.
- **Modify notes:** Add or edit a blocking or non-blocking note to the patron's record using the Patron Status workflow.
- **Modify patron account:** Change a patron account using the Patron Status workflow (for example, changing notes, grouping hold and ILL requests, changing claims, and doing money transactions).
- **Modify reader services:** Change a patron's Outreach Services settings. (Note that separate permissions control the ability to work with reader ratings and remove items from a patron's reading history.)

Post patron message (System) Add a message to a patron record or modify an existing message. Patrons can read and delete these messages online, from the PAC patron account.

- **Allow:** Use the **Add message** and **Modify message** options for messages in the Notes view of the Patron Status workflow.

Reading history: Remove non-ORS patron history entries (System, Library, Branch) Remove individual items from a non-outreach services patron's reading history. This permission is also required: **Patron Status: Modify reader services.**

- **Allow:** Select and remove individual items from the Reading History list (Patron Status workflow - Reader Services view).

Reading history: Remove ORS patron history entries (System, Library, Branch)	Remove individual items from an outreach services patron's reading history. This permission is also required: Patron Status: Modify reader services. • Allow: Select and remove individual items from the Reading History list (Patron Status workform - Reader Services view).
Remove collection agency block (System)	Remove specific charges for a specific patron from collection agency reporting. • Allow: Specify Remove From Collection on the Collection Summary dialog box (Patron Status workform - Account view).
Renew items (System)	Renew items. • Allow: Renew items - Check Out and Patron Status workforms.
Renew items with holds (System)	Renew items with hold requests. • Allow: Renew items - Check Out and Patron Status workforms.
Renew overdue items (System)	Renew items. • Allow: Override an overdue block at renewal - Check Out and Patron Status workforms.
Reset due date (System)	Reset the due date of selected items already checked out. • Allow: Reset the due date - Check Out and Patron Status workforms.
Suppress warnings for breakable links when deleting multiple patron records (System)	Allows a staff member to suppress warning messages regarding breakable links when deleting multiple records. With this permission, the staff member can uncheck the warning messages option on the confirmation message for deleting multiple patron records. When the box is cleared, no further warning messages regarding breakable links appear during the delete operation. • Allow: Uncheck the Warn me about breakable links box on the confirmation message dialog box for deleting multiple patron records.
Suppress warnings for unbreakable links, and other stopping conditions, when deleting multiple patron records (System)	Allows a staff member to suppress warning messages regarding unbreakable links and other stopping conditions when deleting multiple records. With this permission, the staff member can uncheck the warning messages option on the confirmation message for deleting multiple patron records. When the box is cleared, no further warning messages regarding unbreakable links or other stopping conditions appear during the delete operation. • Allow: Uncheck the Warn me about unbreakable links and other stopping conditions box on the confirmation message dialog box for deleting multiple patron records.
Use 'own' patron record sets (System)	Create, change, and delete patron record sets owned by a staff member or group. • Allow: Create and maintain patron record sets owned by an individual staff member or group.

Patron Services Parameters Reference

These parameters are available on the **Parameters, Patron Services** tabbed page on the Administration Explorer, at the listed organizational levels.

Note:

Separate sets of parameters affect requests, notification, and self-check circulation.

Account transaction deletion (System, Library, Branch)	Specifies whether finished transactions older than a specified period are deleted from the patron's transaction summary. Double-click to display the Finished Transaction deletion setup dialog box. See "Setting Patron Accounting Options" on page 70. This setting also determines how long certain patron account data from deleted patron records is saved for cash reports. See "Retaining Financial Information for Deleted Patron Records" on page 65. • Default: Not enabled (transactions are not deleted); if enabled, default period is 3 years.
Accrued fine options (System)	Determines whether to include claimed items and/or lost items in estimated accrued fine calculations; determines whether to include estimated accrued fines in blocking calculations. See "Calculating and Blocking for Estimated Accrued Fines" on page 340. • Default: No options checked
Associated patron options (System, Library, Branch)	Sets a limit on the number of records that can be associated with one patron record, and sets the blocking default. See "Associated Patron Blocking" on page 356. • Default: 20; do not block
Check-in: auto-charge fine from item work form and find tool context menu (System, Library, Branch)	Determines whether overdue fines are automatically charged to the patron account when overdue items are checked in from the Item workform, the Find Tool context menu, or the Patron Status workform - Items Out view. When the parameter is set to Yes and an overdue item is checked in, the fine is automatically charged to the patron account. If the overdue item can fill an active hold request, the hold request message appears and the staff member takes action on the hold request message. (When the parameter is set to Yes and a billed item is checked in, the Resolve lost/billed item dialog box appears, the staff member resolves the billed charges, and the item is checked in. If the billed item can fill a request, the hold request message appears before the Resolve lost/billed item dialog box. The staff member takes action on the hold request message first.) If the parameter is set to No,

the Check In - Fine dialog box appears when the item is overdue, and the staff member resolves the fine accordingly. However, if the item can fill a hold request, the hold request message always appears first.

- **Default:** Yes

Check-in: Listview options
(System, Library, Branch) Specifies which optional columns (**Title**, **Material Type**, **Patron Name**) appear on the Check In workform's **Items Checked In** list for the Normal view and Bulk view. See [“Setting Up the Check In Workform”](#) on page 165.

- **Default:** All values selected

Check-in: Prompt for in-transit in bulk mode
(System, Library, Branch) Applies to bulk check-in. Items assigned to another branch are automatically given a status of In-transit when checked in. This parameter specifies if a message notifies the user of the In-transit status when an item is checked in at a branch other than the assigned branch.

- **Settings: Yes** — Items assigned to another branch cause the message to appear: **No** (default) — No message is displayed.

Check-in: Prompt for in-transit in normal mode
(System, Library, Branch) Applies to normal check-in. Specifies if a prompt appears when an item is checked in at a branch other than the assigned branch. The prompt offers the choice of changing the item's status to In-transit to its assigned branch, or changing the item's status to In.

- **Settings: Yes** — Items assigned to another branch cause the prompt to appear: **No** (default) — Items assigned to another branch are automatically given a status of In-transit when checked in.

Check-in: Receipt options
(System, Library, Branch) Specifies which fields appear on the check-in receipt. See [“Setting Up Circulation Receipts”](#) on page 167.

- **Default:** Item barcode, title, author, material type, call number, and patron's limited barcode

Check-out: Charge options
(System, Library, Branch) Sets policies for charging for check-out and/or renewal. See [“Charging for Checkout and Renewal”](#) on page 252.

- **Default:** No charges enabled

Check-out: Listview options
(System, Library, Branch) Specifies which optional item information columns appear on the Check Out workform. See [“Setting Up the Check Out Workform”](#) on page 162.

- **Default:** All values selected

Check-out: Optional patron data
(System, Library, Branch) Specifies which optional patron data fields appear on the Check Out and Patron Status workform. See [“Setting Up the Check Out Workform”](#) on page 162.

Check-out: Receipt options
(System, Library, Branch) Specifies which optional fields appear on the check-out receipt. See [“Setting Up Circulation Receipts”](#) on page 167.

- **Default:** Library phone, library Web address

Check-out: warn if item is from another branch (System, Library, Branch)	Determines whether this message is displayed when you attempt to check out an item that belongs to another branch: This item is assigned to 'Branch X'. Do you want to continue with this transaction? • Settings: • Yes — The message is displayed. A staff member can select Yes or No on the message dialog box. If the staff member selects Yes, the check-out transaction continues normally. If the staff member selects No, the transaction is stopped. The item's status is unchanged. • No (default) — No message is displayed. The check-out transaction continues normally.
Check-out: warn to send item in-transit (System, Library, Branch)	Applicable when the parameter Check-out: warn if item is from another branch is set to Yes and the staff member chooses No (do not continue with the check-out transaction). Determines whether this subsequent message is displayed: Do you want to put this item in transit to 'Branch X'? • Settings: • Yes (default) — The message is displayed. A staff member can select Yes or No on the message dialog box. If the staff member selects Yes, the item is put in-transit. If the staff member selects No, the item status is unchanged. • No — No message is displayed. The item is automatically put in-transit.
Claims: Number patron can have at one time (System, Library, Branch)	If a patron claims that she never had an item or that she returned an item, and a claim is added to her record, this setting determines how many claims she can have before Polaris blocks her account. These include only the claims still on the patron's record, not items that have been recovered. • Default: 10
Claims: Total number allowed (System, Library, Branch)	Specifies the maximum number of resolved and unresolved claims a patron is allowed. If a patron accumulates the maximum number of claims, Polaris blocks the patron from borrowing any more items. Maximum claims include current claims and all the old claimed items that have since been found. • Default: Value from parent organization setting
Collection agency options (System, Library, Branch)	Defines the conditions and methods for sending delinquent account information to a collection agency. Double-click Collection agency options to display the Collection Agency Setup dialog box. See "Using a Collection Agency" on page 260.
Consortium circulation (System)	Specifies the governing library (transacting branch, item's assigned branch, patron's branch) to use for due date calculation, loan and request limits, fine calculation, and lost item recovery. Double-click Consortium circulation to display the Consortium Circulation dialog box. See "Governing Library for Circulation Transactions" on page 209.

Course reserve options (System, Library, Branch)	Defines the default settings for the reserve item “record,” which stores circulation, status, and disposition information about an item that has been placed on course reserve. Double-click Course reserve options to display the Course Reserve dialog box. See “Setting Up Course Reserves” on page 498.
Credit for overpayment (System, Library, Branch)	Specifies whether an overpayment on a patron account can be applied to the account as a credit. See “Setting Patron Accounting Options” on page 70. • Default: No
Days not fineable (System, Library, Branch)	Identifies the days of the week for which fines are not charged on an overdue item. For example, a library decides to designate Sunday as a “day not fineable” because the library is closed. If an item is due on Saturday and returned on Monday, fines are not charged for Sunday. To select days for which overdue fines are not charged, double-click Days not fineable to display the No Fine Day(s) dialog box. Then select the check box for each day to be omitted for overdue fines, and click OK . • Default: None
Distributed waivers (System, Library, Branch)	Specifies whether a specific amount can be deducted from <i>each</i> of several selected charges on a patron’s account. See “Setting Patron Accounting Options” on page 70. • Default: No
Due date truncated: Prompt (System, Library, Branch)	Specifies whether a message is displayed at circulation when a due date is changed automatically according to the number of hold requests for an item (see “Defining Hold Processing Options” on page 289), or for an end-of term due date setting (see “Setting End-of-Term Due Dates” on page 222). • Default: No
Duplication detection options (System, Library, Branch)	Specifies which, if any, additional patron record fields are checked for matching criteria during patron duplicate detection. Double-click Duplicate detection options to display the Duplicate detection options dialog box. See “Setting Patron Duplicate Detection” on page 53. • Default: No values selected
End-of-term due date options (System, Library, Branch)	Specifies one or more due dates for items. This feature allows libraries to prevent the circulation of items after a certain date, such as the end of a school term. After the date has passed, items can circulate again. Double-click End-of-term due date options to display the End-of-term due date options dialog box. See “Setting End-of-Term Due Dates” on page 222. • Default: No values selected

EReceipt options (System, Library, Branch)	Enables eReceipts (e-mail and/or text message receipts) so that patrons can receive these instead of printed check-out, renewal, and fine receipts. See “Setting Up eReceipts” on page 190. • Default: Not enabled; no values selected
Express patron registration options (System, Library, Branch)	Specifies the values that automatically appear in fields on the Express Registration workflow upon express patron record creation. Double-click Express patron registration options to display the Express patron registration options dialog box. See “Setting Express Registration Defaults and Requirements” on page 46.
Fine and loan period defaults (System, Library, Branch)	Specifies default fine and loan period values to use when a new fine or loan period code is created. See “Defining Fines and Fees” on page 225 and “Defining Loan Periods” on page 213.
Fine receipt options (System, Library, Branch)	Specifies which optional fields appear on the fine receipt, and whether a receipt is printed for waived charges. See “Setting Up Circulation Receipts” on page 167. • Default: Library phone, library Web address, Suppress for waived charges
Fine receipts: Print duplicate receipt (System, Library, Branch)	If fine receipts are printed, this setting specifies whether duplicate fine receipts are also printed, which may be required by library policy. See “Set fine receipt options” on page 174. • Default: No
Floating enabled (System, Library, Branch)	Specifies whether floating collection settings are used. See “Setting Up Floating Collections” on page 360. • Default: No
Floating: Float items with no matching collection (System, Library, Branch)	Specifies whether items with no matching collection at the receiving branch can float to that branch. When set to Yes, a floating item can be checked in; the collection changes to null (blank). For more information about the effects of this parameter, see “Cooperative Considerations for Floating Collections” on page 361. For more information about floating collections, see “Setting Up Floating Collections” on page 360. • Default: No
Floating: Items with blank Assigned Collection can float (System, Library, Branch)	Specifies whether items with no designated collection can float to a receiving branch. For more information about the effects of this parameter, see “Cooperative Considerations for Floating Collections” on page 361. For more information about floating collections, see “Setting Up Floating Collections” on page 360. • Default: No

Floating: Prompt for additional floating items (System, Library, Branch)

Determines whether a prompt is displayed at check-in for a floating item when material limits would be exceeded for the receiving branch. When this parameter is set to **Yes**, and a floating item is checked in, a prompt appears if the item would exceed the maximum limit for items attached to the same bibliographic record (see [“Limit the floating items for the same title a branch can receive”](#) on page 372). The staff member can override the limit and accept the item. If you leave this parameter set to **No** and an item is over the limit, no message is displayed and the item goes in-transit back to the home branch. For more information about floating collections, see [“Setting Up Floating Collections”](#) on page 360.

- **Default:** No

Free days (bulk) (System, Library, Branch)

Identifies the default number of days omitted from overdue fine calculations at bulk check-in and when uploading offline transaction files (Bookmobile workform). This setting also determines free days for check-in and renewal from the Patron Status workform - Items out view, the item record, Find Tool, and during check-out when an item already checked out to one patron is checked out to another. See [“Free Days”](#) on page 227.

- **Default:** 0 days

Free days (normal) (System, Library, Branch)

Identifies the default number of days omitted from overdue fine calculations at normal check-in. Free days are used to cover unexpected closings when books might be checked in late, and the library does not want to charge overdues for the unexpected down time. See [“Free Days”](#) on page 227.

- **Default:** 0 days

Hold slip options (System, Library, Branch)

Specifies which optional fields appear on the hold slip. See [“Setting Up Circulation Receipts”](#) on page 167.

- **Default:** Patron name, Limited patron barcode, Print patron phone, Patron address

Holds call slip: enable (System, Library, Branch)

Specifies whether a specially formatted hold call slip is available. This slip includes extended information, and can be folded to conceal patron information. See [“Setting Up Circulation Receipts”](#) on page 167.

- **Default:** No

Holds pickup slip options (System, Library, Branch)

Specifies whether a specially formatted hold pickup slip is available. This slip is formatted for libraries that let patrons pick up their own held items. Specifies which optional fields appear on the hold pickup slip and the number of blank lines to place at the right side of the hold pickup slip. See [“Setting Up Circulation Receipts”](#) on page 167.

- **Default:** Not enabled

Hours of operation (System, Library, Branch)	Identifies the days closed and hours opened for the organization. Double-click Hours of operation to display the Hours of Operation dialog box. You can also make these settings on the branch workform (select Tools, Define Hours of Operation). To set specific <i>dates</i> closed, such as January 1, 2010, see “Identifying Dates Closed” in the <i>Polaris Administration Guide 4.1R2</i>. • Default: No values
In-transit slip options (System, Library, Branch)	Specifies whether a requesting patron’s name is printed on the in-transit slip, whether the destination branch’s full name or an abbreviation is printed, and whether the in-transit and pickup slips are to be combined. See “Setting Up Circulation Receipts” on page 167. • Default: Patron’s name - Yes; Branch full name
Items out receipt options (System, Library, Branch)	Specifies the optional information to include on the printed Items Out list, available from the Patron Status workform - Items Out view. See “Set Items Out receipt options” on page 172.
Last use patron display (System, Library, Branch)	Specifies whether the link to the previous borrower’s record is available, and whether the patron’s barcode is displayed, on the Item Record workform - Circulation view. Privacy policies at the library may restrict displaying who had an item after the item is returned. • Settings: • No — The link to the last borrower’s patron record is not available, and the patron’s barcode is not displayed on the Item Record workform - Circulation view. When this parameter is set to No at the branch level, the information is not displayed for the staff member’s log-on branch. • Yes (default) — The Item Record workform - Circulation view offers a link to the last borrower’s record, and the patron’s barcode is displayed.
Lost item charge options (System, Library, Branch)	Specifies whether an item’s status is changed to lost when the item is billed for overdue fines (system level only); whether overdue fines are charged to the patron’s account if you set billed items to be declared lost automatically; whether overdue fines are charged to the patron’s account when an item is declared lost; or whether overdue fines are instead calculated when a lost item is returned. See “Overdue Fines on Lost Items” on page 243.
Lost item recovery (System, Library, Branch)	Specifies the automatic actions to take when lost items are recovered at check-out, normal check-in, and bulk check-in. Certain settings also apply to offline circulation and Polaris ExpressCheck. When you set automatic default processing options, staff do not need to resolve lost items manually when they are recovered at circulation. See “Setting Lost Item Recovery Defaults” on page 248.

Material type groups (System, Library, Branch)	Specifies groups of material types and sets check-out limits on a selected groups for specified patron codes. See “Defining Material Type Group Limits” on page 348.
Offline: Include patron account balance (System)	Determines whether the patron account balance is included in the offline MDB files. (It does not affect offline circulation operations.) • Default: Yes
Offline: trap holds at check-in (System, Library, Branch)	Determines whether eligible items are trapped for holds when an offline file with check-in transactions is uploaded. See “Holds Processing at Upload” on page 386. • Default: Yes
ORS packing list (System, Library, Branch)	Specifies header and rating line text for outreach services packing lists where reader ratings are enabled. See “Setting Up Reader Ratings” on page 495. • Default: None defined
ORS reading history (System, Library, Branch)	Specifies the length of time a title is kept in an Outreach Services patron’s reading history, and the maximum number of titles the history can contain. See “Setting Up Outreach Services” on page 478. • Default: 3 years, 1,000 titles
ORS automatically print packing list (System, Library, Branch)	Determines whether the packing list is automatically printed when items are checked out for outreach services patrons. See “Setting Up Reader Ratings” on page 495. • Default: No
ORS: Include other library items in selection list processing (System, Library, Branch)	Used in outreach services processing. When this parameter is set to Yes , items belonging to the libraries in the ORS: Included Branches policy table are candidates for selection list processing when staff members choose Default branches to select items. The staff member can also choose Any to include items from any branch in the system. When the parameter is set to No , the table is ignored and the Default branches and Any options are not available. Only items belonging to the logged-in branch are selection list candidates. For more information about setting the ORS: Included Branches policy table, see “Set branch items to include in outreach selection lists” on page 491. For more information about all Polaris Administration settings that affect outreach services processing, see “Setting Up Outreach Services” on page 478.
ORS: Prompt for update during normal check-out (System, Library, Branch)	Displays a prompt to update the next service date for an active ORS patron during normal check out. See . • Default: Yes
Outreach title rating enabled (System, Library, Branch)	Determines whether reader ratings for titles can be added to an outreach services patron record (Patron Status workform -Reader Services view). See “Setting Up Reader Ratings” on page 495.

- **Default:** No — Reader ratings cannot be added to patron record.
- Overdues: # of days until long overdue (System, Library, Branch)** Specifies the number of days to count from the day the item becomes overdue until the item becomes “long overdue.” Polaris uses the threshold to increment the long overdue counter.
 - **Default:** 0 (zero) — Suppresses the long-overdue status and any related long-overdue processing.
- Overdues: Add closed days/dates to grace days (System)** Specifies whether to include closed days and dates in your system’s grace period calculations. See [“Grace Periods”](#) on page 228.
 - **Default:** No
- Overdues: Block for long overdue items (System, Library, Branch)** Specifies whether a check-out is interrupted if the patron has any borrowed items with the long overdue status. The time interval that makes an item long overdue is specified by the **Overdues: # of days until long overdue** parameter.
 - **Settings:**
 - **No** — A patron with long overdue items can borrow more items.
 - **Yes** — A message interrupts check-out when the patron barcode is entered if the patron has long overdue items.
- Overdues: Charge fines for claimed items (System)** Specifies whether an overdue fine is charged if an item with the status Claim Returned or Claim Never Had is checked in or checked out.
 - **Settings:**
 - **No** — No fines are charged for overdue claimed items at renewal, normal and offline check-in and check-out, or Polaris ExpressCheck check-out and renewal.
 - **Yes (default)** — Overdue fines are charged on overdue claimed items that are checked in or checked out.
- Overdues: Clear fine if recovered at check-out (System)** Specifies whether an overdue fine is automatically waived if the item is “recovered” during a check-out.
 - **Settings:**
 - **No (default)** — The fine remains in a patron’s account history for the overdue item.
 - **Yes** — The fine is waived automatically if the item is found during a check-out operation.
- Overdues: Clear fine if recovered at renewal (System)** Specifies whether an overdue fine is waived automatically for an overdue item if the patron is renewing the item.
 - **Settings:**
 - **No (default)** — The fine remains in a patron’s account history for the overdue item.
 - **Yes** — The fine is waived automatically if the patron renews the overdue item.

Overnight loan period (System, Library, Branch)	Indicates that the library automatically permits overnight loans for hourly loans (less than 24 hours) due after the library's closing time. Double-click Overnight loan period to display the Overnight Loan Period dialog box. To permit automatic overnight loans, select the Allow automatic overnight loan check box. To make overnight loans due later than the library's opening time, input hours or minutes in the time period boxes (Time after opening when item is due). Click OK to submit your settings. See "Hourly Loans" on page 215. • Default: Selected, with one hour of additional time.
Patron delete options (System, Library, Branch)	Defines if and how Polaris automatically deletes patron records in batch processing. With this parameter, you also set the thresholds for exceptional conditions to block patron record deletion. Double-click Patron delete options to display the Patron delete options dialog box. See "Setting Options for Deleting Patron Records" on page 64.
Patron message text: Configure (System, Library, Branch)	Defines available messages for posting to specific patron records and provides the ability to translate the messages into languages licensed for Polaris PowerPAC. See "Setting Up Patron Messages" on page 57.
Patron message text: Expiration period (System, Library, Branch)	Sets the standard posting period (1-99 days) for messages that have been posted to specific patron records. See "Setting Up Patron Messages" on page 57. • Default: 14 days
Patron registration: Filter patron codes (System, Library, Branch)	Specifies which patron codes, as defined in the Patron Codes policy table, are available for selection in the organization's workforms. See "Defining Patron Codes" on page 23. • Default: All selected
Patron registration options (System, Library, Branch)	Specifies the values, if any, that automatically appear in fields on the Patron Registration workflow upon patron record creation. Double-click to display the Patron registration options dialog box. See "Setting Patron Registration Defaults and Requirements" on page 41.
Quick-circ: material type (System, Library, Branch)	Specifies the default material type setting for new quick-circ item records. See "Circulating Ephemeral Items" in the <i>Polaris Patron Services Guide 4.1R2</i>.
Reading history (System, Library, Branch)	Identifies how patron reading histories are maintained in Polaris. Double-click to display the Reading History Setup dialog box. See "Setting Reading History Options" on page 55.
Registration fee options (System, Library, Branch)	Specifies the registration fees, if any, for specific patron codes. The fee is applied automatically at the time of registration or renewal, and the patron account is blocked until the charge is paid. Double-click to display the Registration Fee Options dialog box. See "Charging for Patron Registration" on page 50.

Remove patron ID from circulation transactions (System, Library, Branch)	Purge patron identification information from transaction records and item record histories after a specified time period. See “Removing Patron ID Information from Transaction Files” on page 79.
Renewal: Block if there are holds (System,)	Displays a block message when a renewal attempt is made on an item that is out and there are requests for the title. Permissioned staff can renew the item, or the renewal can be cancelled. When set to Yes , the block message is always displayed when there are requests for the title. When set to No , the block message is displayed only when the item being renewed is the only item available to fill the request. If other holdable and potentially eligible items are In, no dialog box appears and the item can be renewed. See “Blocking Holds at Renewal” on page 311. • Default: Yes
Replacement fee options (System, Library, Branch)	Defines how the replacement cost and processing fees are calculated for each material type when a patron is charged for replacing a lost or damaged item. Double-click to display the Replacement Fee Defaults dialog box. See “Setting Replacement Fee Defaults” on page 241.
Shelving status options (System, library, branch)	When an item is returned to its assigned branch and checked in, the item’s circulation status becomes In even though the item may not be immediately returned to the shelf. Use this parameter to enable a shelving status description and, for each material type, set a period of time during which the checked-in item’s In status is displayed as Shelving (or another appropriate description). See “Setting Shelving Status” on page 204.
Standard loan period (System, Library, Branch)	Defines the loan period that the system, library, or branch uses during offline circulation, when there is no access to the database to determine the loan period. • Default: 21 days
Undefined fine amount (System)	Defines the fine amount that the system uses when the fine cannot be determined, perhaps because a patron code has not been defined. This value is also used to automatically populate the tables if a new branch or patron code is added. • Default: \$5.00
Undefined loan period (System)	Defines the loan period that the system uses when the loan period cannot be determined, perhaps because a patron or item code has not been defined. Polaris displays a message at check-out if the undefined loan period is being used. Staff members can use the undefined loan period or set a loan period manually, using the Special Loan Period dialog box. This value is also used to automatically populate the appropriate tables if a new branch or patron code is added. • Default: 14 days

Waive All displays (System, Library, Branch) Determines whether the Waive All icon and shortcut key are available for use from the Patron Status workform - Account view. See [“Waive All Option in the Patron Status Workform - Account View”](#) on page 71.

- **Default:** Yes

WAM Block if Patron has stops (System, Library, Branch) For libraries that use Wireless Access Manager (WAM) software. Determines whether patrons whose accounts are blocked can use wireless access. When you set this parameter to **Yes** at the branch level, it applies to patrons registered at that branch no matter where the blocked patron tries to use wireless access. That is, even if the blocked patron tries to use wireless access at a branch that sets this parameter to **No**, the patron cannot use wireless access at that branch.

- **Default:** Yes

Patron Services Profiles Reference

These profiles are available on the **Profiles, Patron Services** tabbed page on the Administration Explorer, at the listed organizational levels.

Audio feedback for barcode scan (Workstation)	Specifies if a workstation produces a sound to signal a successful barcode scan. Most barcode readers are programmed to beep for a correct scan. If your reader does not produce a sound, you can enable a sound with this setting. The sound comes from the default computer speaker or external speakers, depending on the setting of the Circulation Option dialog box (Circulation, Options on Polaris Shortcut Bar). If you select Use Windows Sounds, the sound is specified by the Default Sound setting on the Sounds dialog box (displayed from the Windows Control Panel). See “Set up audio circulation signals” in the <i>Polaris Patron Services Guide 4.1R2</i>. If you set this profile to Yes, you must restart the Polaris staff client on the workstation before it takes effect. • Default: No
Contribute to LJ Books Most Borrowed (System)	Determines whether your library system’s circulation and hold request statistics are compiled for inclusion in <i>Library Journal’s</i> Books Most Borrowed feature. For details, see “Sending Circulation Statistics to Library Journal” in the <i>Polaris Administration Guide 4.1R2</i>. • Default: Yes - Via Web Service
Default directory (System, Library, Branch, Workstation)	Displays the Default Directory Setup dialog box, which specifies the folder used as the default path for patron services reports. The folder can be a shared folder on the network or a folder on the staff computer. Each workstation may have a different default directory for patron services functions. • Default: C:\ProgramData\Polaris\[version]\
Display photo ID (System, Library, Branch, Workstation)	Determines whether the Patron Registration workflow - Photo ID view is available and whether the patron’s ID photo is displayed in the Check Out workflow. This feature is available by separate license. See “Setting Up Patron Photos” on page 62. • Default: Yes

Patron can enable/disable reading history (System, Library, Branch)	Specifies if the patron can stop or start a reading history from the PAC patron account. If the setting is Yes, the option is available in the Contact Information and Preferences section of the PAC patron account. • Default: No • Requirements: If you will allow patrons to start and stop reading histories, you must set up reading history parameters. Also, Outreach Services patrons cannot stop their reading histories. See “Setting Reading History Options” on page 55.
Patron initiated circulation: Blocking conditions (System, Library, Branch)	Displays the Patron Initiated Circulation: Blocking Conditions dialog box, which contains settings for blocking renewals from the PAC, by inbound telephony service, from SIP self-check units, and ebook circulation from PAC. See “Defining Patron-Initiated Circulation Blocks” on page 352.
Override patron services blocks (Staff)	Specifies whether the staff member can override permission blocks in patron services and circulation. • Settings: • Yes - The staff member can give other staff members temporary access to restricted patron services and circulation functions. • No (default) - The staff member is not allowed to override permission blocks on restricted patron services and circulation functions.
Patron registration user defined fields (System, Library, Branch)	Defines the labels for free-text and drop-menu user-defined fields (UDFs) in patron records, and the possible options from drop-menu UDFs. (The labels are set up at implementation.) Individual branches can specify which drop-menu UDF options to display, determine the order of display, and designate a default value to be used during patron registration. All five user-defined fields (UDFs) are searchable. See “User-Defined Fields in Patron Records” on page 35. For information about setting default values for UDFs in the staff client, see “Setting Patron Registration Defaults and Requirements” on page 41 and “Setting Express Registration Defaults and Requirements” on page 46. For information about setting default values for UDFs for PAC online registration, see “Set up online patron self-registration” in the <i>Polaris Public Access Administration Guide 4.1R2</i>.

Notification Parameters Reference

These parameters are available on the **Parameters, Notification** tabbed page on the Administration Explorer, at the listed organizational levels.

Active default notification delivery option (System)	Identifies the default delivery method for notices, if not specified in the patron record. This parameter affects only the notice queue, not the patron record itself. • Default: Mailing Address
Notification options (System, Library, Branch)	Identifies the notice types, languages, and notification delivery methods that organizations use, as well as settings for overdue, hold request, and e-mail reminder notices. See “Managing Notification” on page 399 for detailed information.
Notice history: hold notices time threshold (System, Library, Branch)	Controls how long pick-up and cancelled hold notices are kept in the patron’s notice history. The default setting is 90 days; the maximum value is 9,999 days. See “The Notification History” on page 401 for detailed information.
Notice history: item and account notices time threshold (System, Library, Branch)	Controls how long overdue, fine, bill, and reminder notices are kept in the notice history. The default setting is 90 days; the maximum value is 9,999 days. See “The Notification History” on page 401 for detailed information.

Request Parameters Reference

These parameters are available on the **Parameters, Request** tabbed page on the Administration Explorer, at the listed organizational levels.

Borrow by mail (Various)	These settings control Polaris Borrow by Mail, a licensed feature. See “Setting Up Borrow by Mail Circulation” on page 471.
Hold options (Various)	These settings control holds processing in Polaris. See “Holds Processing Overview” on page 278.
ILL options (Various)	These settings control ILL processing in Polaris. See “Setting Up ILL Requests” on page 319.
ILL: Computer designated for sending OCLC/ILL direct requests (System)	The Polaris Application Server handles ILL direct requests to OCLC. Your existing application server is the default entry. If your application server name changes, enter the new Polaris Application Server name in this parameter. See “Setting Up ILL Requests” on page 319.

Self-Check Parameters Reference

These parameters are available on the **Parameters, SelfCheck Unit** tabbed page on the Administration Explorer, at the system, library, and branch levels.

Polaris ExpressCheck Parameters

These parameters apply to Polaris ExpressCheck self-check units. For more information about setting up Polaris ExpressCheck, see the *Polaris ExpressCheck Administration Guide*.

- Polaris ExpressCheck: Options** Set options to activate Polaris ExpressCheck, require a patron password, display an on-screen keypad, display the holds queue position, display a warning message for expiring patron accounts, permit registration renewal at the Polaris ExpressCheck unit, print receipts for individual items, allow access to patron accounts, enable eReceipts, and other options. You can also set the time-out period. If you use ITG DiscXpress II dispenser units, you can choose to display an on-screen acknowledgement message when a dispenser item is checked out. See [“Enable the media dispenser”](#) on page 465.
- Polaris ExpressCheck: Blocking Conditions** Displays the Polaris ExpressCheck Blocking Conditions dialog box, where you set the conditions related to patron records and item records that should block circulation at the Polaris ExpressCheck unit.

Media Dispenser Parameter

- Media dispenser settings** Enable Polaris to work with the ITG DiscXpress II media dispenser, and specify material types and messages. See [“Setting Up ITG DiscXpress II in Polaris”](#) on page 464.

SIP Unit Parameters

These parameters apply to self-check units that rely on SIP protocol. Other settings also affect SIP self-check units. For more information about setting up SIP self-check units, see [“Setting Up SIP Self-Check”](#) on page 452.

- Allow SIP processing** Enables self-check to run.
- **Default:** Yes
- Assigned staff member** The library staff member who is assigned the circulation transaction.
- **Default:** PolarisExec
- SIP default workstation** The workstation ID used for self-check transactions.

SIP login password	The password for logging in to self-check. • Default: 3MLogin
SIP login user ID	The username for logging in to self-check. • Default: 3MLogin
SIP uses patron passwords	Enables self-check to require passwords for patrons to use self-check. • Default: No
Default security marker	Type of security marker on the items.
Patron Blocks	Options for respecting or ignoring blocks on patron records: free-text blocks; library-assigned blocks; associated patron blocks; collection agency blocks; blocking notes; setting for maximum claims allowed. • Default: Various
Retries allowed	Number of times the self-check unit attempts to resend a message to the client machine. This applies when there are network problems or if the client software goes offline. • Default: 3
Time-out period 000 (none)-999 (not known)	Number of seconds (in tenths of a second) that the self-check unit pauses before retrying or canceling a transaction that does not receive a response from the client software. • Default: 300 tenths of a second (30 seconds)
Allow check-outs during renewal	Permits a library item that is already checked out to one person, according to the system, to be checked out to another person. • Default: Yes
Check-ins ok	Permits library items to be checked in. • Default: Yes
Check-outs ok	Permits library items to be checked out. • Default: Yes
Check-out: Charge options	If the organization has set charge policies for checkout or renewal, this parameter determines whether chargeable items can be checked out or renewed at the SIP self-check workstation.
Deny check-out if item is from another branch	Determines whether an item can be checked out if it belongs to another branch. • Settings: • Yes - An item assigned to another branch cannot be checked out using this self-check unit. • No (default) - An item assigned to another branch can be checked out using this self-check unit.

Holds ok	Permits hold requests to be placed on items. • Default: No
Offline ok	Set this to No because currently, you cannot use SIP self-check offline.
Renewals ok	Permits an item to be renewed. • Default: No
Use error correction	Permits a checksum and sequence number at the end of every message sent to and from the software. • Default: Yes
Status update ok (can block a patron, etc.)	Permits a patron's status to be updated. Allows a self-check unit equipped to detect suspicious behavior (such as swapping items in a stack) to apply a block to a patron record. • Default: Yes
System supports the block patron message	Displays a message when a patron is blocked from checking out material. The message may appear if a patron left his card in the SelfCheck machine or was tampering with the machine. • Default: Yes
System supports the check-in message	Displays a message to check in material. • Default: Yes
System supports the check-out message	Displays a message to check out material. • Default: Yes
System supports the end session message	Displays a message to end the session. • Default: No
System supports the fee paid message	Displays a message to pay a fee to the patron's account. • Default: No
System supports the hold message	Displays a message to put an item on hold. • Default: No
System supports the item info message	Displays a message with item information. • Default: No
System supports the item status message	Displays a message with an item's status. • Default: No
System supports the login message	Displays a message for a user to log on to self-check. • Default: Yes

System supports the patron enable message	Displays a message for a patron to access self-check. • Default: Yes
System supports the patron info message	Displays a message with patron information. • Default: No
System supports the Patron status message	Displays a message with the patron status. • Default: Yes
System supports the renew all message	Displays a message to renew all items checked out to a patron. • Default: No
System supports the renew message	Displays a message to renew an item. • Default: No
System supports the request resend message	Displays a message to resend a request. • Default: Yes
System supports the system status message	Displays a message with the system's status. • Default: Yes
Allow checkout of items with free text blocks	Specifies whether items with free-text blocks to be checked out. • Default: Yes
Allow checkout of items with library assigned blocks	Specifies whether items with library-assigned blocks can be checked out. • Default: Yes
Checkin: Claim Never Had, allow checkin	Specifies whether an item with a status of Claim Never Had can be checked in at the self-check unit. • Default: No
Checkin: Claim Returned, allow checkin	Specifies whether an item with a status of Claim Returned can be checked in at the self-check unit. • Default: No
Printer messages	The messages that appear on receipts. You can modify them to differ from the messages that appear on the screen for the same functions.
Screen messages	The messages that appear on the screen. You can modify them to differ from the messages that appear on receipts for the same functions.
SIP2 extensions enabled	For certain vendors' self-check units, enables specific SIP2 functionality. • Default: No
Use printer messages	Enables the printer messages to be printed on receipts.
Use screen messages	Enables the screen messages to appear on the screen.

Credit Card Payment Parameters Reference

These parameters are available on the **Parameters, Credit Card Payment** tabbed page on the Administration Explorer, at the listed organizational levels.

Exclude local workstations from web based payments (System)

When set to **Yes**, supports a lower level of PCI compliance on the library's part by preventing payments through PayPal's Payflow Pro or hosted gateway solutions such as Payflow Link, Payments Gateway, or Comprise SmartPay from within the library network. "Local workstations" are those defined in the In-House IP Addresses database table. See ["Excluding In-House Workstations from Web-Based Payments"](#) on page 108.

- **Default:** No

Online Payments: Configure (System, Library, Branch)

Use this parameter to set up credit card processing in the staff client, PAC, and Polaris ExpressCheck. Double-click to display the Online Payment Settings dialog box. You need specific values from your e-commerce provider to configure online payments. See ["Setting Up E-Commerce"](#) on page 85.

Payment Terminal ID (Workstation)

For Comprise SmartPAY users. Use this parameter to specify the SmartTerminal card reader ID. You must set this parameter for each staff client and ExpressCheck workstation with a SmartTerminal reader. See ["E-Commerce with Comprise™ SmartPAY™"](#) on page 137.

Index

A

- Active Payment Manager
 - PAC credit card processing, overview, [157](#)
 - reports, [158](#)
 - requirements, [156](#)
 - staff client use, [156](#)
 - using with Polaris, [156](#)
- address check
 - setting default value, [43](#)
- announcements
 - overview, [442](#)
 - sending by e-mail, [444](#)
- area codes
 - setting default value (patron registration), [42](#)
- AVS
 - in credit card setup, [93](#)

B

- Bibliographic record delete, [318](#)
- bills
 - circulation status for billed items, [415](#)
 - overview, [414](#)
 - Patron Billing Statement, [420](#), [431](#), [439](#)
 - printing, [435](#)
 - setting billed items to lost, [246](#)
 - setting up, [416](#)

- blocks
 - display order, item blocks, [327](#)
 - display order, patron blocks, [331](#)
 - displaying library-assigned in PAC patron account, [329](#)
 - ebook circulation, [352](#)
 - including estimated accrued fines in blocking calculations, [340](#)
 - item, overview, [325](#)
 - items, defining, [326](#)
 - loan limits, overview, [332](#)
 - long overdue items, [339](#)
 - modifying fine limits, [337](#)
 - modifying limits by totals, [337](#)
 - modifying overdue items limits, [337](#)
 - patron, defining, [329](#)
 - patron, overview, [328](#)
 - renewals from PAC, telephone, SIP self-check, [352](#)
 - request limits by material type, overview, [332](#)
 - self-check (Polaris ExpressCheck), [355](#)
 - self-check (SIP units), [456](#)
 - setting for claims, [331](#)
 - setting for loan limits, [336](#)
 - setting loan limits by material type, [338](#)
 - setting loan limits by material type groups, [348](#)
 - setting on PAC ebook circulation (procedure), [353](#)
 - setting on PAC, telephone, SIP self-check renewals, [353](#)
 - setting request limits by material type, [338](#)
 - total overdues, [337](#)
 - unpaid fines, [332](#)
 - wireless access (WAM) use, [339](#)
- Bookmobile
 - free days, [388](#)
 - overview, [387](#)
 - report warning messages, [386](#)
 - Suppressing holds processing at upload, [386](#)
 - transaction files, overview, [385](#)
 - transaction reports, deleting, [389](#)
 - transaction reports, viewing, [389](#)
 - uploading files (procedure), [387](#)
 - uploading files, overview, [386](#)
- Borrow by Mail
 - setup (overview), [471](#)
 - setup (procedure), [472](#)
 - telephone notification, [473](#), [476](#)

C

- cancelled request notices
 - setting up, [424](#)
- carriers
 - setup for mobile phone and TXT message, [449](#)
- cash drawer
 - setting options for receipt printers, [184](#)
- charges
 - automatic waivers, allowing, [72](#)
 - distributed waivers, allowing, [72](#)
- Check In workform (circulation)
 - customizing data fields, overview, [165](#)
 - setting data fields, [165](#)
- Check Out workform
 - customizing data fields, overview, [162](#)
 - previous borrower display, enabling, [208](#)
 - setting item data fields, [163](#)
 - setting patron data fields, [162](#)
- check-in receipts
 - information options, setting, [173](#)
- checking in items (circulation)
 - auto-charging fines, [229](#)
 - permissions, [11](#)
- checking out items
 - charging for check-out, [252](#)
 - permissions, [9](#)
- check-out receipts
 - information options, setting, [170](#)
 - print on prompt only, [171](#)
- circulation governing library
 - overview, [209](#)
- circulation parameters
 - overview, [19](#)
 - setting, [19](#)
- circulation permissions
 - overview, [6](#)
 - reference list, [510](#)
 - setting, [7](#)
 - supervisor override, [6](#)
- circulation policies
 - overview, [21](#)
- circulation profiles
 - overview, [19](#)
- circulation status
 - summary and definitions, [200](#)
- Circulation Statuses table
 - overview, [200](#)
 - viewing and editing, [202](#)
- claims
 - including in estimated accrued fines, [340](#)
 - claims (circulation)
 - setting limits for blocks, [331](#)
- Class Point of Sale
 - credit card processing, setting up, [158](#)
 - PAC credit card processing, overview, [157](#)
 - reports, [158](#)
 - requirements, [156](#)
 - staff client use, [156](#)
 - using with Polaris, [156](#)
- closed dates
 - use in due date calculation, [215](#)
- closed days
 - use in due date calculation, [215](#)
- collection agency
 - floating collection implications, [364](#)
 - FTP report transmission, [263](#)
 - overview (administration), [260](#)
 - payments, [273](#)
 - permissions, [18](#)
 - prerequisites, [264](#)
 - reporting for lost item charges only, [261](#)
 - reporting minors, [262](#)
 - reporting patrons, [260](#)
 - reporting patrons, start, [267](#)
 - reporting patrons, stop, [267](#)
 - reports, overview, [274](#)
 - setting up reporting parameters, [266](#)
 - Submission Report, [274](#)
 - Synchronization report, [274](#)
 - turning off, [266](#)
 - Update Report, [274](#)
- Collection Agency Synchronization report
 - running, [275](#)
- collections, floating
 - defining, [366](#)
 - overview, [360](#)
 - See also floating collections
- combined notices
 - setting up, [416](#)
- Comprise SmartPAY credit card processing
 - overview, [137](#)
 - setup, [146](#)
- consortium circulation
 - governing library for circ transactions, [210](#)
 - setting processing rules, overview, [209](#)
- control codes
 - setting for receipt printers, [184](#)

- Course Reserve tables
 - adding courses (administration), [500](#)
 - Course Names table, [500](#)
 - Course Term table, [502](#)
 - Departments table, [504](#)
 - overview, [499](#)
 - School/Divisions table, [506](#)
- course reserves
 - permissions, [16](#)
 - setting parameters for reserve item records, [507](#)
 - setting up options, overview, [507](#)
 - setting up tables, overview, [499](#)
- Credit Card Payment parameters
 - reference list, [539](#)
- credit card processing
 - AVS security, overview, [93](#)
 - cancel SALE method, Payflow Pro, [92](#)
 - Class POS, overview, [157](#)
 - Class POS, setting up, [158](#)
 - Comprise SmartPAY, overview, [137](#)
 - CW2 security, overview, [93](#)
 - error logs, [89](#)
 - errors e-mail, [92](#)
 - excluding local workstations from web-based PAC payments, [88](#)
 - Payflow Link, overview, [104](#)
 - Payflow Link, setting up in Polaris Administration, [113](#)
 - Payflow Link, setting up Payflow Link account, [110](#)
 - Payflow Pro, overview, [86](#)
 - Payflow Pro, setting up, [90](#)
 - Payments Gateway, overview, [119](#)
 - Payments Gateway, setting up in Polaris Administration, [129](#)
 - Payments Gateway, setting up Payments Gateway account, [125](#)
 - reports, [89](#)
 - test values, Payflow Pro, [102](#)
- credits
 - allowing for overpayments, [72](#)
- customer support
 - contacting, [4](#)
- CW2
 - in credit card setup, [93](#)

D

- dates closed
 - use in fine calculation, [226](#)
 - use in holds routing calculation, [283](#)
- days at branch (holds routing)
 - overview, [283](#)

- days closed
 - indicating days where no fines apply, [227](#)
 - use in holds routing calculation, [283](#)
- days not fineable
 - use in fine calculation, [227](#)
- deleting patron records
 - automatic deletion, setting up, [66](#)
 - blocks on deletion, setting, [68](#)
 - financial transaction retention, [65](#)
 - methods, overview, [64](#)
- delivery routes
 - setting for outreach services, [480](#)
- donations
 - branch display order in PAC, [101](#), [118](#), [136](#)
 - setting PAC for donation payments, [90](#)
 - suppressing a branch from display, [101](#), [118](#), [136](#)
- Donations - Credit Card Payments
 - report, [89](#)
- driver's license scan
 - setup for patron registration, [36](#)
- due dates
 - changing for request-to-item ratio, [300](#)
 - closed dates and days in calculation, [215](#)
 - governing library, setting, [210](#)
 - hourly loans, [215](#)
 - non-circulating items, [216](#)
 - offline calculation, [214](#)
 - overnight loans, [215](#)
 - overview, [214](#)
 - shortened due date prompt, [300](#)
 - shortened due date prompt for end-of term, [224](#)
 - standard loan period, [214](#)
 - undefined loan period, [214](#)
- duplicate detection
 - list limits, [53](#)
 - matching characters, [53](#)
 - patron, overview (administration), [53](#)
 - patron, setting options, [54](#)
 - patron, use of birth date, [53](#)

E

- e-commerce
 - Class Point of Sale, [156](#)
 - Comprise SmartPAY, [137](#)
 - Payflow Link, [104](#)
 - Payflow Pro, [86](#)
 - Payments Gateway, [119](#)
- e-mail announcements
 - sending, [444](#)
 - See also announcements

- e-mail notification
 - automatic report, [443](#)
 - Email Delivery Failure Report, [443](#)
 - Email Summary Report, [442](#)
 - failure detection, [443](#)
 - message formats, [442](#)
 - overview, [442](#)
 - plain text express registration default, [47](#)
 - plain text registration default, [42](#)
 - prerequisites, [444](#)
 - reverse DNS lookup, [444](#)
- e-mail reminder notices
 - overview, [432](#)
 - setting up, [433](#)
- end-of-term due dates
 - deleting, [224](#)
 - editing, [224](#)
 - overview, [222](#)
 - setting, [222](#)
- Ephemeral items (quick-circ)
 - permissions, [12](#)
- Epson ReStick printers
 - printing hold and in-transit slips, [188](#)
- eReceipts
 - editing in Polaris Language Editor (WebAdmin), [193](#)
 - enabling, [194](#)
 - enabling for PAC renewals, [195](#)
 - failure report, [194](#)
 - fine payments, [191](#)
 - overview, [190](#)
 - PAC self-registration and updates preference, [192](#)
 - patron record settings, [190](#)
 - setting as express patron registration default, [48](#)
 - setting as patron registration default, [42](#)
 - waived charges, [192](#)
- error logs
 - credit card processing, [89](#)
- expiration (patron registration)
 - setting default value, [43](#)
- exporting
 - notices (patron), [405](#)

- express registration
 - address term, setting default, [48](#)
 - allowing, [46](#)
 - area code, setting default, [48](#)
 - expiration term, setting default, [48](#)
 - home branch, setting default, [47](#)
 - language, setting default, [47](#)
 - notification method, setting default, [47](#)
 - patron code, setting default, [47](#)
 - setting defaults, [46](#)
 - setting required fields, [46](#)
 - user-defined fields, setting required, [48](#)
 - verify patron block, setting, [47](#)

F

- Fee Descriptions table
 - adding entries, [238](#)
 - modifying entries, [239](#)
 - overview, [237](#)
 - setting entries for display, [239](#)
- fees
 - overview (administration), [237](#)
 - replacement, overview, [241](#)
 - replacement, setting defaults, [241](#)
 - setting descriptions to display to staff, [239](#)
 - setting up descriptions, [238](#)
- fine codes
 - overview, [231](#)
- Fine Codes table
 - adding entries, [231](#)
 - modifying entries, [232](#)
 - overview, [231](#)
- fine limits
 - coordinating settings, [333](#)
- fine notices
 - overview, [428](#)
 - printing, [435](#)
 - setting up, [429](#)
- fine receipts
 - duplicate print option, [174](#)
 - setting information options, [174](#)
 - suppressing for waived charges, [174](#)

fines

- adding a fine amount (administration), [234](#)
- auto-charging at check-in, [229](#)
- calculating (description), [226](#)
- estimated, display in PAC, [342](#)
- estimated, display in Polaris ExpressCheck, [344](#)
- estimated, display in staff client, [342](#)
- estimated, option in Polaris Phone Attendant, [345](#)
- estimated, settings, [346](#)
- governing library, setting, [210](#)
- grace units, setting, [235](#)
- including estimated accrued fines in blocking calculations, [340](#)
- omitting days of the week from calculation, [227](#)
- overdue claimed items, [230](#)
- receipts, [174](#)
- setting amounts, overview, [233](#)
- use of fine codes in calculating, [231](#)
- use of free days in calculating, [227](#)
- use of grace periods in calculating, [228](#)
- using undefined fine amount, [235](#)
- waiving automatically, [229](#)

fines and fees

- permissions, [10](#)

Fines and Fees - Credit Card Payments

- report, [89](#)

Fines table

- adding entries, [234](#)
- modifying entries, [236](#)
- overview, [233](#)

first available copy requests

- multi-part titles, overview, [290](#)
- multi-part titles, setting up, [291](#)
- serials, overview, [290](#)
- serials, setting up, [291](#)

floating collections

- assigned branch changes, [364](#)
- blocks at check-in, [363](#)
- bulk change warning message, [376](#)
- bulk check-in, [363](#)
- cancelling check-in, [363](#)
- check-in from item record, [363](#)
- circulation processing, [362](#)
- claimed items, [363](#)
- collections agency, [364](#)
- cooperative policies, [361](#)
- designating, [366](#)
- disabling for home branch, [364](#)
- eligible collections, overview, [366](#)
- enabling, [376](#)
- examples of setup, [377](#)
- fines at check-in, [362](#)
- holds trapping at check-in, [362](#)
- In to In, [363](#)
- in-transit prompt, [363](#)
- item record changes when received, [365](#)
- item warning message, [376](#)
- items that do not float, [363](#)
- items with no assigned collection, [375](#)
- items with no matching collection, [375](#)
- limiting received items, [372](#)
- lost items, [363](#)
- material types, setting non-floating, [371](#)
- offline check-in, [364](#)
- on-the-fly items at check-in, [363](#)
- overview, [360](#)
- parameters and profiles, setting, [374](#)
- processing overview, [361](#)
- receiving branches, setting, [370](#)
- receiving limits, prompt to exceed, [375](#)
- serial items, [364](#)
- shelving status, [363](#)
- SIP check-in, [364](#)
- tables, overview, [369](#)
- transactions, [364](#)
- troubleshooting, [379](#)
- viewing history, [365](#)

free days

- difference from grace period, [228](#)
- setting defaults, [227](#)

G

governing library, circulation

- overview, [209](#)

- grace period
 - difference from free days, [228](#)
 - including closed dates and days, [229](#)
 - use in fine calculations, [228](#)

H

- hold call slips
 - enabling, [177](#)
- hold not-supplied reasons
 - overview, [287](#)
- hold pickup slips
 - setting up, [178](#)
- hold request notices
 - overview, [421](#)
 - printing, [435](#)
 - second notice overview, [422](#)
 - setting up, [424](#)
- Hold Request Statuses table
 - viewing and editing, [317](#)

hold requests

- adjusting loan periods, 300
- alerts, setting, 298
- bib or item record deletion with linked requests, 318
- blocking at renewal, 311
- blocks, setting, 298
- cancelled request notices, 423
- charges in Children's PAC, 295
- default expiration period, 302
- deleted at check-out, 288
- deleting cancelled, 302
- deleting expired, 302
- deleting not-supplied, 302
- due dates, automatically adjusting, 298
- editing status descriptions, 317
- enabling for PAC, 291
- Held and Shipped items in limit calculations, 302
- holds queue display in PAC, 280
- holds queue display in Polaris ExpressCheck, 280
- item-level holds and relinked bib records, 314
- limiting by material type, overview, 332
- limiting pickup library options, 297
- limits and governing library setting, 335
- maximum days held for pickup, 302
- notices, 421
- not-supplied reason default, setting, 305
- not-supplied reasons, defining, 287
- permissions, 15
- pickup library display order (PAC), 297
- pick-up notices, 421
- preferred borrower branches, 296
- preventing for item circ status, 291
- preventing on patron record blocks, 299
- processing set-up, overview, 278
- queue position, 308
- randomizing primary group responder, 304
- randomizing secondary group responder, 304
- restricting multiple items, 314
- restricting on new items, 314
- restricting specific items, 312
- routing set-up, overview, 280
- second notices, 422
- second pick-up notices, 422
- serial and multi-part requests, overview, 289
- serial and multi-part requests, setting up, 291
- setting charges, 295
- single cycle in secondary RTF group, setting, 303
- status descriptions, 315
- Suppressing holds processing at upload, 386
- suspension by patrons, permitting, 299
- titles with no items, enabling in PAC, 299
- titles with no items, message in staff client, 299

- Total days in Primary RTF cycle, 304

- Total days in Secondary RTF cycle, 305

- transferring to secondary routing group, 304

- trap at checkout, allowing, 298

- trapping preference groups, 308

- trapping preferences, 307

- unclaimed date calculation, 302

- unclaimed processing options, setting, 302

hold slips

- exporting to Epson ReStick printers, 188

- overview, 168

- setting information options, 175

Holds options parameter

- setting options, 289

holds processing

- setup, overview, 278

holds queue

- displaying position in PAC, 280

- displaying position in Polaris ExpressCheck, 280

holds routing

- days at branch, overview, 283

- immediate transfer to secondary group, 304

- randomizing primary group responder, 304

- randomizing secondary group responder, 304

- requester branch, overview, 282

- responder branch, overview, 282

- routing groups, overview, 280

- sequence, overview, 282

- set-up, overview, 280

- single cycle in primary group, setting, 303

- single cycle in secondary RTF group, setting, 303

- Total days in Primary RTF cycle, setting, 304

- Total days in Secondary RTF cycle, setting, 305

Holds Routing Sequences tables

- adding entries, 283

- deleting entries, 285

- modifying entries, 285

- overview, 282

- reordering entries, 285

home branch (item)

- use in floating collections, 361

home branch (patron registration)

- setting default value, 41

hourly loans

- setting up, 215

hours of operation

- use in calculating hourly loans, 215

- use in due date calculation, 215

- use in holds routing calculation, 283

I

- interlibrary loan requests
 - application server name for OCLC direct requests, [323](#)
 - bibliographic and item record deletion, [320](#)
 - default needed-by period, [322](#)
 - defining options, [321](#)
 - enabling in PAC, [321](#)
 - enabling in staff client, [322](#)
 - excluding patrons by code, [322](#)
 - held period, [322](#)
 - mediating hold-to-ILL, [322](#)
 - mediating PAC requests, [322](#)
 - OCLC connection set-up, [323](#)
 - OCLC services, [319](#)
 - overview, [319](#)
 - PAC messages, [322](#)
 - PAC processing, described, [320](#)
 - permissions, [15](#)
- in-transit slips
 - exporting to Epson ReStick printers, [188](#)
 - setting information options, [182](#)
- Item Block Descriptions table
 - adding entries, [326](#)
 - deleting entries, [327](#)
 - modifying entries, [327](#)
 - overview, [325](#)
- item blocks
 - display order, [327](#)
 - overview (administration), [325](#)
- item circulation statuses
 - Circulation Statuses table, overview, [200](#)
 - listing and editing, [202](#)
 - shelving status, overview, [204](#)
 - shelving status, setting, [205](#)
- Item record delete, [318](#)
- item record history
 - purging patron ID information, [79](#)
- Item Statistical Class Codes table
 - adding entries, [397](#)
 - displaying, [397](#)
 - modifying entries, [398](#)
 - overview, [396](#)
- Items Out receipt
 - specifying content, [172](#)

ITG DiscXpress II

- Administration settings (procedure), [465](#)
- check-in, described, [462](#)
- checkout at Polaris ExpressCheck, described, [463](#)
- checkout at staff client, described, [462](#)
- errors, [469](#)
- installation, [464](#)
- overview, [461](#)
- Polaris ExpressCheck messages, [468](#)

L

- languages (patron registration)
 - multilingual notices, [406](#)
 - setting default value, [42](#)
- last activity date
 - in patron records, block deletion by, [68](#)
 - inactive patron reminder notices, [432](#)
- loan limits
 - governing library, setting, [210](#)
 - modifying, [336](#)
 - overview, [332](#)
- loan period codes
 - naming, [217](#)
- Loan Period Codes table
 - adding entries, [217](#)
 - modifying entries, [218](#), [450](#)
 - overview, [217](#)
- loan periods
 - adjusting for hold requests, [300](#)
 - hourly, [215](#)
 - overview, [219](#)
 - setting message for shortened loans, [224](#), [301](#)
 - shortening for request-to-item ratio, [300](#)
 - standard loan period, [214](#)
 - undefined loan period, [214](#)
- Loan Periods table
 - adding entries, [220](#)
 - modifying entries, [221](#)
 - overview, [219](#)
- lost items
 - charging overdue fines, [243](#)
 - including in estimated accrued fines, [340](#)
 - overdue charges, setting, [246](#)
 - recovery defaults, setting, [249](#)
 - recovery settings overview, [248](#)

M

- material type groups
 - check-out limits, [348](#)

material types

- mapping to NCIP medium types, [32](#)
- material type code, displaying, [198](#)
- NCIP medium type mapping, overview, [31](#)
- non-floating, [371](#)
- overview, [198](#)
- self-check, overview, [452](#)
- setting up, [198](#)

Material Types table

- adding entries, [198](#)
- deleting entries, [198](#)
- modifying entries, [199](#)
- overview, [198](#)

multi-lingual notices

- setting up, [406](#)

N

NCIP

- mapping medium types, [31](#)
- mapping user privilege types, [28](#)

NCIP Medium Types tables

- modifying entries, [32](#)

NCIP User Privilege Types table

- modifying entries, [29](#)

non-circulating items

- designating, [216](#)
- setting PAC description, [203](#)

notices

- bills, overview, [414](#)
- bills, setting up, [416](#)
- cancelled request, setting up, [424](#)
- cancelled requests, overview, [423](#)
- CJK printing incorrectly, [438](#)
- combined, overview, [415](#)
- combined, setting up, [416](#)
- default method in PAC, setting, [47](#)
- default method in patron record, setting, [42](#)
- delivery methods, [403](#)
- delivery methods, serial claims, [404](#)
- delivery methods, setting, [409](#)
- editing, [406](#)
- e-mail addresses, setting, [409](#)
- e-mail delivery prerequisites, [444](#)
- e-mail delivery, overview, [442](#)
- e-mail failure detection, [443](#)
- e-mail notice reports, [442](#), [443](#)
- e-mail reminders, overview, [432](#)
- e-mail reminders, setting up, [433](#)
- e-mail report, [443](#)
- e-mail summary report, [411](#)
- exporting print, overview, [405](#)
- exporting setup, [409](#)
- exporting telephone, overview, [405](#)
- fine notice, printing, [435](#)
- fine notices, setting up, [429](#)
- hold request, ebooks, [423](#)
- hold request, overview, [421](#)
- hold request, printing, [435](#)
- hold request, setting up, [424](#)
- language preference in PAC, [410](#)
- language strings, editing, [406](#)
- multi-lingual, overview, [406](#)
- notification history, setting retention period, [401](#)
- notification library, [400](#)
- overdue and billing, printing, [435](#)
- overdue, overview, [413](#)
- overdue, setting up, [416](#)
- overview, [399](#)
- patron billing statements, printing, [439](#)
- patron preference, [403](#)
- printing, overview, [435](#)
- reprinting, [438](#)
- request notice processing, e-mail and text message, [404](#)
- second hold request, overview, [422](#)
- set-up, overview, [400](#)
- sorting printed notices, [437](#)
- statistical reports, [407](#)
- text message, failure report, [445](#)

- text message, setting up, [445](#)
- text messaging, carrier setup, [449](#)

Notification Detail

- Report, [408](#)

Notification parameters

- reference list, [533](#)

Notification Summary

- report, [407](#)

O

OCLC

- interlibrary loan services, [319](#)

offline circulation

- due date calculation, [214](#)

Offline Extract job

- running, [384](#)

offline Polaris

- Bookmobile, overview, [387](#)
- copying offline files automatically, [382](#)
- downloading files, [383](#)
- logging on, [385](#)
- setting up, [382](#)
- Suppressing holds processing at upload, [386](#)
- tasks, [385](#)
- transaction files, overview, [385](#)
- updating offline files manually, [384](#)

ORS

- See outreach services

Outreach Delivery Mode table

- setting delivery mode options, [479](#)

Outreach Delivery Route/Stops table

- setting up outreach services delivery routes, [480](#)

Outreach Disability table

- setting disability options, [484](#)

Outreach Equipment table

- setting equipment options, [486](#)

Outreach Excluded Circ Statuses table

- excluding items from outreach processing, [489](#)

Outreach Included branches table

- setting branches for selection lists, [491](#)

Outreach Pick List Headers table

- display columns for outreach pick lists, [493](#)

outreach services

- delivery mode options (administration settings), 479
- delivery options, administration overview, 479
- delivery routes (administration settings), 480
- disabilities and equipment options, administration overview, 484
- disability options (administration settings), 484
- equipment options (administration settings), 486
- excluding item circ statuses (administration settings), 489
- including branch items in processing (administration settings), 491
- item options, administration overview, 489
- permissions, 18
- pick list view options (administration settings), 493
- Polaris Administration settings, overview, 478
- prompt to update service date from normal check out, setting, 494
- reader ratings (administration settings), 496, 497
- reader ratings, administration overview, 495
- reading history limits, setup (administration), 487
- results set size for selection lists, 492

overdue charges

- lost items, 246

overdue notices

- overview, 413
- Patron Billing Statement, 420, 431, 439
- printing, 435
- setting up, 416

overnight loan period

- use in calculating due times, 215

P

parameters

- circulation, overview, 19
- circulation, setting, 19
- Credit Card Payment reference list, 539
- Notification reference list, 533
- Patron Services reference list, 519
- patron services, overview, 19
- patron services, setting, 19
- Request reference list, 534
- self-check (SIP units), setting, 456
- SelfCheck Unit reference list, 535

passwords, default

- assigning to patron records, 44

patron accounting options

- administration settings, overview, 70

patron associations

- setting up blocks on associated records (administration), 356

Patron Billing Statement

- printing, 420, 431, 439

Patron Block Descriptions table

- adding and re-ordering entries, 329
- deleting entries, 331
- modifying entries, 330
- overview, 328

patron blocks

- display order, 331
- overview (administration), 328

patron codes

- adding, 24
- deleting, 24
- filtering for organizations, 26
- mapping to NCIP user privilege types, 29
- modifying, 25
- NCIP privilege type mapping, overview, 28
- overview, 23
- setting default value, 42

Patron Codes table

- adding entries, 24
- modifying entries, 25
- overview, 23

patron duplicate detection

- See duplicate detection

patron messages

- setting up (overview), 57
- setting up (procedure), 58

patron reading history

- See reading history

patron records

- auto-deletion, overview, 64
- auto-deletion, setting, 66
- blocks on deletion, setting, 68
- date sources, 77
- default passwords, 44
- default values, setting, 41
- deletion options, overview (administration), 64
- last activity date, 67
- last activity date and blocks to deletion, 68
- patron codes, defining, 24
- patron codes, filtering, 26
- permissions, 12
- purging patron ID information, 79, 83
- required fields, setting, 41
- statistical class codes, 393
- user-defined fields, viewing, 37

- patron registration
 - default notification method in PAC, [47](#)
- patron registration fees
 - overview, [50](#)
 - setting up, [52](#)
- Patron Services parameters
 - reference list, [519](#)
- patron services parameters
 - overview, [19](#)
 - setting, [19](#)
- patron services permissions
 - overview, [6](#)
 - setting, [7](#)
 - supervisor override, [6](#)
- Patron Services profiles
 - overview, [19](#)
 - reference list, [531](#)
- Patron Statistical Class Codes table
 - adding entries, [394](#)
 - displaying, [394](#)
 - modifying entries, [395](#)
 - overview, [393](#)
- Patron Status workform
 - setting patron data fields, [162](#)
- patron stops
 - See patron blocks
- Patron/Material Type Loan Limit Blocks table
 - adding entries, [335](#)
 - displaying, [336](#)
 - modifying material loan limit entries, [338](#)
 - modifying material request limit entries, [338](#)
 - modifying patron loan limit entries, [337](#)
 - overview, [335](#)
- Payflow Link credit card processing
 - overview, [104](#)
 - setup, Payflow Link account, [110](#)
 - setup, Polaris Administration, [113](#)
- Payflow Pro credit card processing
 - overview, [86](#)
 - setup, [90](#)
- payment methods
 - setting for display, [75](#)
 - staff client, [74](#)
- Payment Methods policy table
 - overview, [74](#)
- Payments Gateway credit card processing
 - overview, [119](#)
 - setup, Payments Gateway account, [125](#)
 - setup, Polaris Administration, [129](#)

- permissions
 - circulation reference list, [510](#)
 - circulation, overview, [6](#)
 - circulation, setting, [7](#)
 - patron services, overview, [6](#)
 - patron services, setting, [7](#)
- photos, patron
 - replacing default, [63](#)
 - setup, [62](#)
- pickup branches
 - display order in PAC, [297](#)
 - limiting for hold requests, [297](#)
- pick-up date (hold requests)
 - calculation, [302](#)
- Polaris offline
 - See offline Polaris
- preferred borrowers
 - setting branches for hold requests, [296](#)
 - setting for item records, [312](#)
- previous borrower
 - link from item record, [208](#)
- printing
 - notices, [435](#)
 - Patron Billing Statement, [420](#), [431](#), [439](#)
- profiles
 - circulation, overview, [19](#)
 - Patron Services reference list, [531](#)
 - Patron Services, overview, [19](#)
- purging
 - patron ID information, [83](#)
 - patron ID information, overview, [79](#)

Q

- quick-circ items
 - material types, setting, [199](#)
 - permissions, [12](#)

R

- reader ratings
 - administration overview, [495](#)
 - packing list setup procedure, [497](#)
 - packing lists (setup overview), [495](#)
 - setup procedure, [496](#)

- reading history
 - overview (administration), 55
 - removing items from PAC, 56
 - removing items from staff client, 56
 - setting limits for outreach services patrons, 487
 - setting up, 55
 - starting and stopping from PAC, 56
 - stopping for all patrons, 56
 - Receipt delivery failure
 - report, 194
 - receipt printers
 - setting control codes, 184
 - setting to open cash drawer, 184
 - receipts
 - adding receipt printers, 184
 - check-in receipt options, setting, 173
 - check-out receipt options, setting, 170
 - eReceipts overview, 190
 - exporting to Epson ReStick printers, 188
 - fine receipt options, setting, 174
 - hold call slip, enabling, 177
 - hold pickup slips, setting up, 178
 - hold slip options, setting, 175
 - in-transit slip options, setting, 182
 - Items Out list content, 172
 - overview, 168
 - setting printer features, 184
 - refunds
 - e-commerce, Payflow Link, 106
 - e-commerce, Payments Gateway, 121
 - SmartPAY, 138
 - Remove Patron ID from circ transactions
 - report, 82
 - renewals
 - charging for renewal, 252
 - setting blocks on PAC, telephone, SIP self-check (overview), 352
 - setting blocks on PAC, telephone, SIP self-check (procedure), 353
 - replacement fee defaults
 - overview, 241
 - setting, 241
 - reports
 - bookmobile upload, 389
 - collection agency, 274
 - credit card payments, 89
 - item statistical codes (setup), 396
 - offline transactions upload, 389
 - patron statistical codes (setup), 393
 - request limits
 - governing library, setting, 210
 - request notices
 - cancelled requests, 423
 - overview, 421
 - second notice overview, 422
 - setting up, 424
 - Request parameters
 - reference list, 534
 - requester branch (holds routing)
 - overview, 282
 - requests
 - circulation status of items, setting ineligible, 294
 - deleted at check-out, 288
 - Out status, 315
 - requests-to-fill
 - routing set-up, overview, 280
 - request-to-item ratio
 - adjusting loan periods, 300
 - required fields (patron records)
 - express registration, setting, 49
 - normal registration, setting, 44
 - responder branch (holds routing)
 - overview, 282
 - RFID
 - port requirement, 454
 - routes
 - outreach services delivery, setting up, 480
 - RTF
 - See holds routing
- ## S
- security
 - setting circulation and patron services, 7
 - Security Manager
 - port requirement, 454
 - self-check (SIP units)
 - material types, 453
 - messages, 459
 - overview, 452
 - setting parameters, 456
 - setting up, 456
 - Self-Check Material Types table
 - adding entries, 453
 - deleting entries, 455
 - modifying entries, 455
 - overview, 452
 - SelfCheck Unit parameters
 - reference list, 535
 - sequence (holds routing)
 - overview, 282

serial holdings
floating collections, [364](#)

shelving status
overview, [204](#)
setting, [205](#)

SmartPAY
refunds, [138](#)

special announcements
See announcements

standard loan period
use in calculating due dates, [214](#)

statistical codes
defining for items, [397](#)
defining for patrons, [394](#)
items, overview, [396](#)
patrons, overview, [393](#)

T

text messages
carriers, setting up, [449](#)
notification failure report, [445](#)
notification method, [445](#)

transaction files
overview, [385](#)
uploading to online Polaris, [387](#)
uploading to online Polaris, overview, [386](#)

transaction reports
deleting, [389](#)
messages, list, [389](#)
viewing, [389](#)

transaction summary (patron account)
setting limits, [72](#)

transactions
purging patron ID information, [79](#)

TXT Delivery Failure
report, [445](#)

U

UDFs
See user-defined fields

unclaimed date (hold requests)
calculation, [302](#)

undefined loan period
use in calculating due dates, [214](#)

User Defined Hold Not-Supplied Reasons table
adding entries, [287](#)
overview, [287](#)

user-defined fields (express registration)
setting default values, [48](#)

user-defined fields (patron registration)
overview, [35](#)
required fields, setting, [43](#)
setting default values, [43](#)
setting up for driver's license scan, [36](#)
viewing, [37](#)

W

waives
allowing distributed waivers, [72](#)
setting automatic waivers, [229](#)
suppressing Waive All, [71](#)

Wireless Access Manager
settings, [530](#)