JA Operations Committee
Polaris 5.0 Upgrade topics
January 13, 2015 9:30 at SALS

Estimating and Blocking for Accrued Fines

Polaris has added a new function to display an estimated fine amount (accrued fines) for items that a patron has currently checked out. The estimated fine amount information is available in the staff client and the PAC (but can be suppressed in the PAC). The calculation is based on the lending branch's settings (because it can't know where the patron will eventually return the items). You can pick a date in the future if you wish to calculate that and the results can be printed.

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. 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.

Warning – this feature cannot be turned off for staff and is misleading

Hold Notice Processing

Polaris has separated the existing Notices processing job (overdues, bills, reminders) and the Hold Notice processing for email and text hold notices. This allows us to run hold notice processing multiple times during the day – it only sends the email and text notices for holds.

The original Notices processing will product the summary report (and include any hold notices that were sent since the Notices processing job was previously run).

The Notices processing job sends txt notices for everything except holds, so we still cannot run it at 6:00 am (when it is scheduled for by default). Therefore, we will continue to run the notice processing at 9:05am.

Decision:

When to run Holds notice processing and how often (Default is every 4 hours between 9:30am and 8pm)

Grace Period calculation

New system-wide option to include closed days and dates in the grace period calculations.
The libraries that currently use Grace days have agreed to use this new option.

Automatically Close Purchase Orders

A new job will be scheduled to automatically close purchase orders if PO type is Firm, Gift or Donation; all items have a status of Received, Cancelled or Partly Received; and all segments have a status of Received or Cancelled. This job will be run daily.

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Missing Part Check-In

Authorized staff can use "Special Item Check-In" to add the item to the "Claims" for a patron.
If a library is interested in using this feature, they will need to work with their system trainers to setup and understand.

Decisions:

Do we want to prevent holds on items in the "Claim missing parts" status? (what do we do with Claims never had and Claims returned now?)
Should the item display be suppressed in the PAC? (We don't suppress other Claims now)

2nd hold pickup notice

You can now 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, e-mail, or TXT message. When enabled the 2nd notice looks exactly like the first.

Default Payment option for Paying / Crediting Invoices

You can now set a default payment option, either Check or Voucher, to be selected automatically in the Check/Voucher dialog box when staff members prepay, pay, or credit an invoice.

Default will be set to "Check"

Associated Patrons (Family) Holds Pickup

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

An option can be set by library to **Always check "Allow me to pick up holds for these patrons" by default.**

Auto-Renew

Option by branch, based on item's assigned branch – items can be automatically renewed (if eligible based on the usual rules for renewal). The renewal takes place during the Notices processing job run at 9:05am daily, based on the **Almost overdue/Auto renew XXX days before an item is overdue** setting in Notices setup. This means that if you send an Almost Overdue notice 3 days before an item is due, that item will auto renew 3 days before it is due.
The new due date is calculated by taking the current due date and adding the full loan period.
Automatically renewed items are included in the Almost overdue reminder notice. An e-mail will notify the patron that the item was renewed automatically, unless the patron has opted out of receiving this

type of reminder notice. The library can set patron access options for the PAC that allow patrons to opt out of receiving reminder notices and/or staff members can set in Patron Registration.

Default notice messages are:

- Email notices: We have automatically renewed the following items and they are now due back on the date indicated below.
- TXT notices: Just a reminder: library items checked out to you have been automatically renewed. Contact the library or check your account on-line.

Reminder Notice Opt Out

Staff can change patron registration to allow the patron to opt out of the following notices:

- Almost overdue/auto-renew
- Patron record expiration
- Inactive patron (currently none of our libraries use this type of reminder)

Libraries can also allow patrons to opt out of email reminders from the PAC.

For branches that send reminder notices, if in Patron Registration a staff person saves the record without a primary email address and the patron has NOT opted out of that type of reminder, a message is displayed - "Reminder notices Option is e-mail. Do you want to continue?"

Other New Features / Differences in Polaris

- Alert: SIP has been re-written
- Save Limit By in Find Tool defaults
- New find tool access points and columns
- Calendar to apply free days in check-in
- Item record display – item history shows checkout / renewal method (e.c. PAC, etc)
- Ad hoc bulk change (for people with permission)
- Receiving invoices multiple lines warns for multiple hold requests
- More links from acquisitions records
- Multiple fund editing
- No notice email summary report for branches with no notices
- Credit card manual payment method
- Patron last activity date updated by payments
- New reports
  - Patron Circulation by Statistical Class report
  - Payment Distribution report – we have our custom Fees Owed reports
- Real-time Request-to-Fill processing and "Ask me later" option - If a branch has an item on the RTF list, but it cannot be located immediately, you can now select the request, right-click and select Ask Me Later or click to move the request from your library's pending list to the next step in the RTF process. Unlike Deny, which removes the item from eligibility to fill the request, Ask Me Later leaves the item eligible to fill the request, giving the library another chance to locate

the item. When enabled for an item, the Ask Me Later icon "ZZ" appears next to the item in the list.

- Only functional icons display in Offline

New Features to be investigated after the upgrade

- eContent integration
- LEAP