

Polaris Demonstration Follow-up questions

- Does Polaris provide a Sandbox for training and testing?

INNOVATIVE

Yes.

- Were the Leap demonstrations performed on a live (production) version or was it a testing/beta version of Leap?

INNOVATIVE

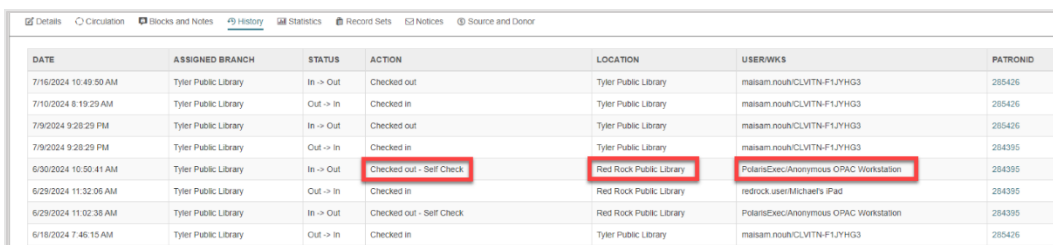
Everything was demonstrated on a live production version that is being used by our customers.

CIRC1 Circulation Checkout

- Demonstrate if the system will indicate if an item was checked out at a self check unit. Can your browser-based software display the "station" location?

INNOVATIVE

Yes



DATE	ASSIGNED BRANCH	STATUS	ACTION	LOCATION	USER/WKS	PATRONID
7/16/2024 10:49:50 AM	Tyler Public Library	In -> Out	Checked out	Tyler Public Library	maisam.nouh/CLVITN-F1JYHG3	285426
7/10/2024 8:19:29 AM	Tyler Public Library	Out -> In	Checked in	Tyler Public Library	maisam.nouh/CLVITN-F1JYHG3	285426
7/9/2024 9:28:29 PM	Tyler Public Library	In -> Out	Checked out	Tyler Public Library	maisam.nouh/CLVITN-F1JYHG3	285426
7/9/2024 9:28:29 PM	Tyler Public Library	Out -> In	Checked in	Tyler Public Library	maisam.nouh/CLVITN-F1JYHG3	284395
6/30/2024 10:50:41 AM	Tyler Public Library	In -> Out	Checked out - Self Check	Red Rock Public Library	PolarisExec/Anonymous OPAC Workstation	284395
6/29/2024 11:32:06 AM	Tyler Public Library	Out -> In	Checked in	Red Rock Public Library	redrock.user/Michael's iPad	284395
6/29/2024 11:02:38 AM	Tyler Public Library	In -> Out	Checked out - Self Check	Red Rock Public Library	PolarisExec/Anonymous OPAC Workstation	284395
6/18/2024 7:46:15 AM	Tyler Public Library	Out -> In	Checked in	Tyler Public Library	maisam.nouh/CLVITN-F1JYHG3	285426

- Demonstrate that an item with ACTIVE bib level holds (title level holds) will ALLOW renewals, if there are an equal or greater number of items with an Available status to fill the number of Active Holds.

Part of **Clarivate**

INNOVATIVE

On the patron account, you will find a column that will let staff know if a checked-out item can fulfill a hold or not based on your rules

TITLE	AUTHOR	RENEWALS LEFT	FILLS HOLD
Middle school, the worst years of my life / The Worst Years of My Life	Patterson, James, ...	5 of 5	Yes
A lesson before dying	Gaines, Ernest J.,...	2 of 2	Yes
Murder at the Gardner : a novel of suspense	Langton, Jane.	3 of 3	No
Whistler in the dark	Malcolm, John.	3 of 3	No
Harry Potter and the Chamber of Secrets	Rowling, J. K., 19...	14 of 14	No

- Demonstrate that an item with INACTIVE bib level holds (title level holds) will ALLOW renewals on checked out or overdue items. Did anyone see this demonstrated?

INNOVATIVE

On the patron account, you will find a column that will let staff know if a checked--out item can fulfill a hold or not based on your rules

TITLE	AUTHOR	RENEWALS LEFT	FILLS HOLD
Middle school, the worst years of my life / The Worst Years of My Life	Patterson, James, ...	5 of 5	Yes
A lesson before dying	Gaines, Ernest J.,...	2 of 2	Yes
Murder at the Gardner : a novel of suspense	Langton, Jane.	3 of 3	No
Whistler in the dark	Malcolm, John.	3 of 3	No
Harry Potter and the Chamber of Secrets	Rowling, J. K., 19...	14 of 14	No

CIRC 2 Circulation Checkin

- Demonstrate that the system records the location and/or staff station at which the item was checked in.

Part of **Clarivate**

INNOVATIVE

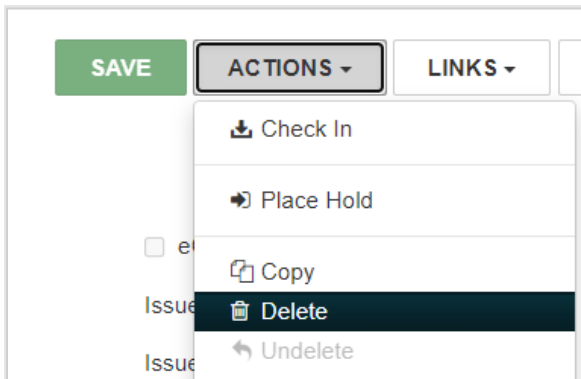
Yes. The system will show the location and the staff station. The system will also show the username.

DATE	ASSIGNED BRANCH	STATUS	ACTION	LOCATION	USER/WKS	PATRONID
7/16/2024 10:49:50 AM	Tyler Public Library	In -> Out	Checked out	Tyler Public Library	maisam.nouh/CLVITN-F1.Y/HG3	285426
7/10/2024 8:19:29 AM	Tyler Public Library	Out -> In	Checked in	Tyler Public Library	maisam.nouh/CLVITN-F1.Y/HG3	285426
7/9/2024 9:28:29 PM	Tyler Public Library	In -> Out	Checked out	Tyler Public Library	maisam.nouh/CLVITN-F1.Y/HG3	285426
7/9/2024 9:28:29 PM	Tyler Public Library	Out -> In	Checked in	Tyler Public Library	maisam.nouh/CLVITN-F1.Y/HG3	284395
6/30/2024 10:50:41 AM	Tyler Public Library	In -> Out	Checked out - Self Check	Red Rock Public Library	PolarisExec/Anonymous OPAC Workstation	284395
6/29/2024 11:32:06 AM	Tyler Public Library	Out -> In	Checked in	Red Rock Public Library	redrock.user/Michael's iPad	284395
6/29/2024 11:02:38 AM	Tyler Public Library	In -> Out	Checked out - Self Check	Red Rock Public Library	PolarisExec/Anonymous OPAC Workstation	284395
6/18/2024 7:46:15 AM	Tyler Public Library	Out -> In	Checked in	Tyler Public Library	maisam.nouh/CLVITN-F1.Y/HG3	285426

- Demonstrate the Option to delete Fast Add entries upon Checkin.

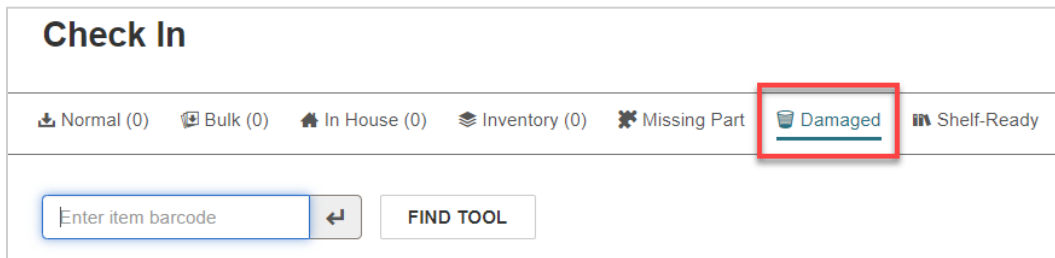
INNOVATIVE

After an item is checked in, go to the item record and delete the record.



- Do you have a Damaged check-in option? If yes, demonstrate how this works and how charges are applied to the patron's record.

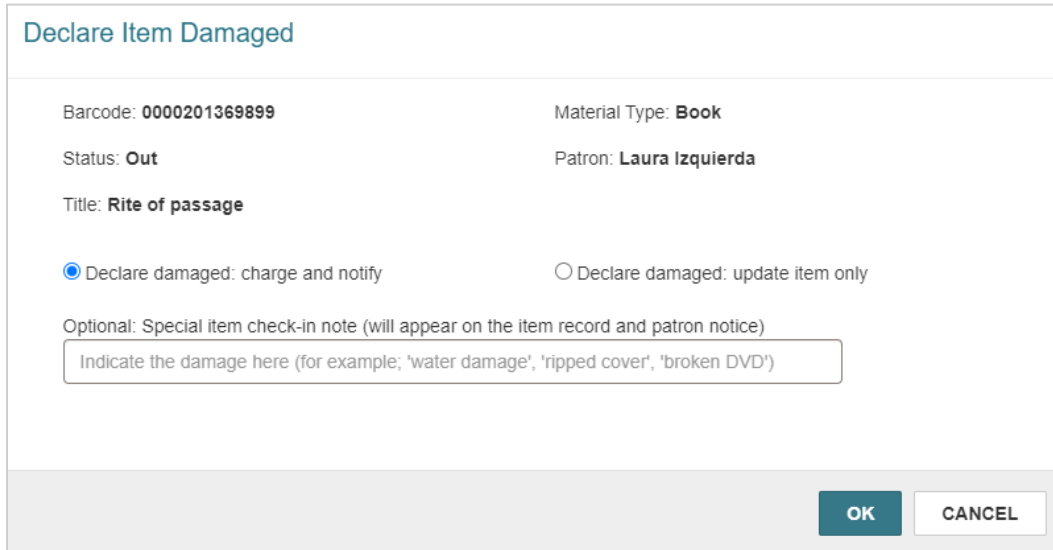
INNOVATIVE



Part of **Clarivate**

Yes, you can check-in using damaged as an option.

Once you scan the item, or find it in the catalog, you will be asked to pick an option from the following screen:



Declare Item Damaged

Barcode: **0000201369899** Material Type: **Book**

Status: **Out** Patron: **Laura Izquierda**

Title: **Rite of passage**

Declare damaged: charge and notify Declare damaged: update item only

Optional: Special item check-in note (will appear on the item record and patron notice)

Indicate the damage here (for example; 'water damage', 'ripped cover', 'broken DVD')

OK **CANCEL**

Select one of the following options:

- **Declare damaged: charge and notify** - When you select this option, Leap does the following:
 - Checks the item in.
 - Sets the item's circulation status to Damaged.
 - If applicable, charges replacement and processing fees to the patron's account.

Note: If the item's status is In, Leap charges replacement and processing fees to the account of the patron who last borrowed the item.

 - Sends a bill notice to notify the patron of the charges.
 - Assigns a system-generated block ("Item is Damaged") to the item record.
- **Declare damaged: update item only** - When you select this option, Leap does the following:
 - Checks the item in.
 - Sets the item's circulation status to Damaged.
 - Assigns a system-generated block ("Item is Damaged") to the item record.

To add a note that appears in the item record and on the bill notice, enter text in the Special item check-in note box.

CIRC 3 – Circulation Financial Transactions

Part of **Clarivate**

- Demonstrate payment of all Lost charges on a record.

INNOVATIVE

The library can either to choose all payments on a record to pay, or sort the "Reason" column by lost charges and pay for those items

<input type="checkbox"/> Pay		<input type="checkbox"/> Waive Charge		<input type="checkbox"/> Add Charge		<input type="checkbox"/> Bill Charge		<input type="checkbox"/> Create Credit		<input type="checkbox"/> Refund Credit		<input type="checkbox"/> Print List	
Charges: \$128.49			Deposits: \$0.00			Credits: \$0.00			Balance: \$128.49				
<input type="checkbox"/>	TYPE	DATE	BARCODE	TITLE	REASON ▼								
<input type="checkbox"/>	Charge	10/12/2023	784589565	Accessories	Damaged Item								
<input checked="" type="checkbox"/>	Charge	10/12/2023	987454312133	Bridal showers	Lost Item								
<input type="checkbox"/>	Charge	7/6/2024	31995000410005	Married life	Overdue Item								
<input type="checkbox"/>	Charge	6/5/2024	31995000410005	Married life	Processing Charge								
<input type="checkbox"/>	Charge	1/5/2024	87112555665	The fashion book.	Processing Charge								
<input type="checkbox"/>	Charge	10/16/2023	7895652625628	The art of dressing curves : the best-kept secrets of a fashion stylist	Processing Charge								
<input type="checkbox"/>	Charge	10/12/2023	987454312133	Bridal showers	Processing Charge								
<input type="checkbox"/>	Charge	6/5/2024	31995000410005	Married life	Replacement Cost								
<input type="checkbox"/>	Charge	1/5/2024	87112555665	The fashion book.	Replacement Cost								
<input type="checkbox"/>	Charge	10/16/2023	34865512321	Tim Gunn's fashion bible : the fascinating history of everything in your closet	Replacement Cost								

- [Are you able to] Demonstrate ECommerce functionality. If yes, point out how the online payment is differentiated from other types of payments.

INNOVATIVE

Under the payment method, you will have the option to choose credit card

Pay Waive Charge Add Charge Bill Charge

Balance: **\$30.20**

Amount:

Method:

- Cash
- Check
- Collection Agency
- Debit card
- Smart card
- Donation
- Pay from Credit

Note:

Charges: \$119.95 Deposits: Credits

- Demonstrate a patron record with a credit balance due to a refund (Lost item paid for and subsequently returned).

INNOVATIVE

When a lost item paid for is returned, you will get the following prompt:

Resolve lost item

Item Barcode: 31995001097462 Title: **Anne of Green Gables**

Lost Date: 7/23/2024 Billed Date: Billed

Patron Name: **Ashraf Ahmed** Patron Barcode: 23000032568905 **Total Fine: \$23.99**

	Replacement:	Processing:	Overdue:
Charge:	\$13.99	\$5.00	\$5.00
Paid:	\$13.99	\$0.00	\$0.00
Waived:	\$0.00	\$5.00	\$0.00
Amount due:	\$0.00	\$0.00	\$5.00

Action:

Amount:

Payment method: Payment amount: \$0.00

Send a bill

CONTINUE **CANCEL**

If you choose to credit the account, then the patron's account will look like this:

Pay Waive Charge Add Charge Bill Charge Create Credit Refund Credit Print List History Notification History Properties

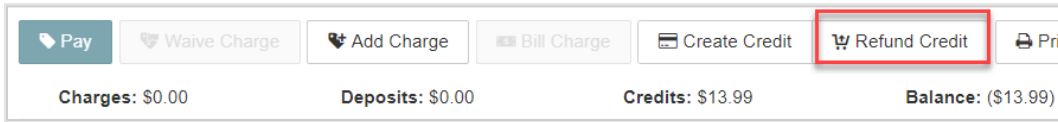
Charges: \$0.00 Deposits: \$0.00 Credits: \$13.99 Balance: (\$13.99) View: Account Summary

TYPE	DATE	BARCODE	TITLE	REASON	ORGANIZATION	NOTE	BILLED	AMOUNT	BALANCE
<input type="checkbox"/> Credit	7/23/2024	31995001097462	Anne of Green Gables	Replacement Cost	Tyler Public Library	Lost and found		(\$13.99)	(\$13.99)
									(\$13.99)

Part of **Clarivate**

- Demonstrate how to clear a refund from a patron record.

INNOVATIVE



- Demonstrate ability or optional feature that links to POS or Cash register.

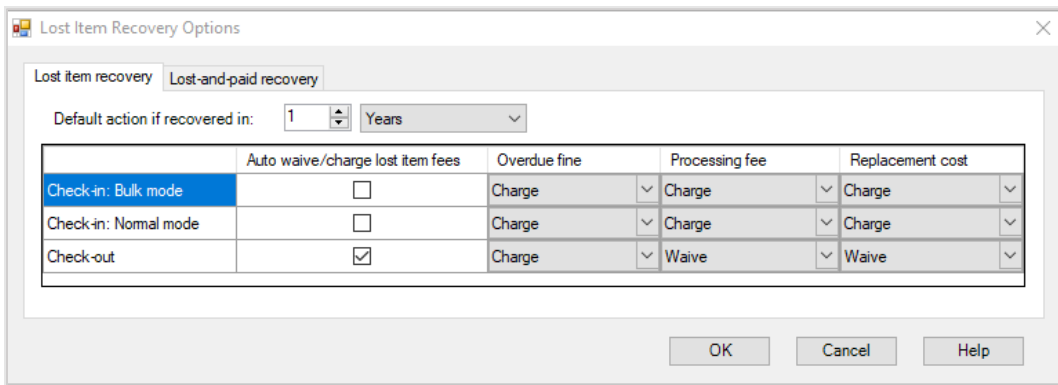
- Demonstrate how the POS or Cash register functionality works.

INNOVATIVE

Polaris does work with POS and Cash registers. Most of our libraries either use [Comprise](#) or [EnvisionWare](#).

- Demonstrate settings that allow each Owning library to decide whether (or not) a refund will be generated when one of their items, that has gone to lost and been paid for by a patron, has been returned and checked in. OR an Automatic message that, upon check-in of a lost/paid/found item, indicates that the owning library does not give refunds.

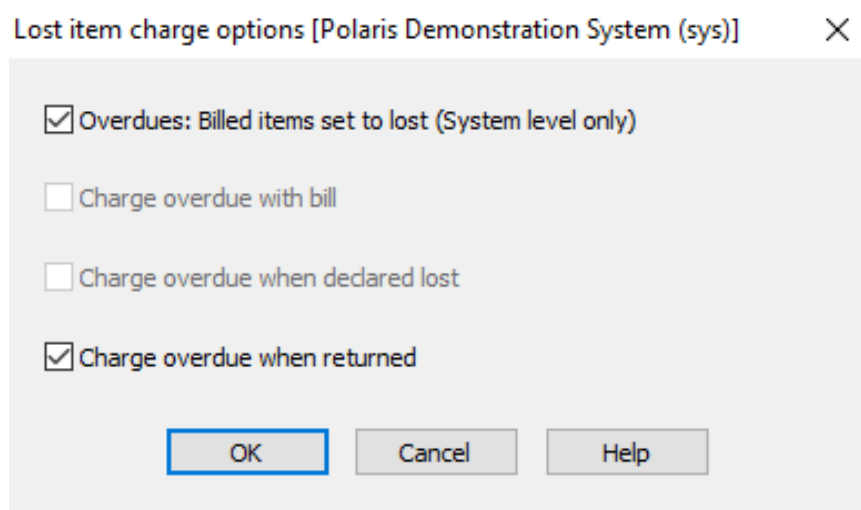
INNOVATIVE



CIRC4 Circulation Lost, Problem and Custom item statuses

Part of **Clarivate**

- Demonstrate or display the setting that causes an overdue item to convert to an item with a Lost status.

INNOVATIVE

Lost item charge options [Polaris Demonstration System (sys)]

- Overdues: Billed items set to lost (System level only)
- Charge overdue with bill
- Charge overdue when declared lost
- Charge overdue when returned

OK Cancel Help

HOLDS1 Holds for Staff

- Demonstrate the real-time list of patron hold requests on a single bib/title.

I think during the demo at this point, Polaris staff was demonstrating the pick list (filling holds from the collections, rather than the "pull" list, removing expired or canceled holds from the hold shelf

INNOVATIVE

The "Picklist" lets you pull items that are filling holds or expired/canceled/unclaimed holds. Under the "Pending" tab is where you would fill holds, and under the "Holds to Action" tab is where you would pull expired/canceled/unclaimed holds.

Picklist

Pending (9)
 Located (1)
 Hold to Action (15)
 Unclaimed ILL (0)

Total items | 15 total

<input type="checkbox"/>	AUTHOR	TITLE	MATERIAL TYPE	PATRON NAME	PATRON BRANCH	PICKUP AREA	ITEM BARCODE	DATE	TYPE
<input type="checkbox"/>	Pilkey, Dav, 1966-	Dog Man and Cat Kid	Book	Nouh, Lujine	TYLER		5400006765444	2/19/2023	Cancelled
<input type="checkbox"/>	Patterson, James, 1947-	Cross justice	Book	Nouh, Maisam	TYLER		9780316407045	2/19/2023	Cancelled
<input type="checkbox"/>	Sinatra, Frank, 1915-	The voice the Columbia years, 1943-1952	CD	GWIN, EDWARD	PPL		30830000962260	7/14/2003	Unclaimed
<input type="checkbox"/>	Austen, Jane, 1775-1817.	Emma	Book	Sobrino, Annabella Rose	CPL		32398000310565	5/3/2013	Unclaimed

- Holds Shelf report. Run the report that lists all of the items on the Hold Shelf. Demonstrate that the report indicates the unexpired holds, expired holds and canceled holds.

INNOVATIVE

Picklist

Pending (9)
 Located (1)
 Hold to Action (15)
 Unclaimed ILL (0)

Total items | 15 total

<input type="checkbox"/>	AUTHOR	TITLE	MATERIAL TYPE	PATRON NAME	PATRON BRANCH	PICKUP AREA	ITEM BARCODE	DATE	TYPE
<input type="checkbox"/>	Pilkey, Dav, 1966-	Dog Man and Cat Kid	Book	Nouh, Lujine	TYLER		5400006765444	2/19/2023	Cancelled
<input type="checkbox"/>	Patterson, James, 1947-	Cross justice	Book	Nouh, Maisam	TYLER		9780316407045	2/19/2023	Cancelled
<input type="checkbox"/>	Sinatra, Frank, 1915-	The voice the Columbia years, 1943-1952	CD	GWIN, EDWARD	PPL		30830000962260	7/14/2003	Unclaimed
<input type="checkbox"/>	Austen, Jane, 1775-1817.	Emma	Book	Sobrino, Annabella Rose	CPL		32398000310565	5/3/2013	Unclaimed

- Holds Shelf report. Demonstrate that once the items are checked in, they are eligible to be trapped for eligible active holds, or are sent to the owning library. Demonstrate that the entries are cleared from the report when the item is checked in.

Part of **Clarivate**

INNOVATIVE

A staff or a patron places a hold

NEAMAT JASSIM REGIS

19561984
TYLER PUBLIC LIBRARY BLOCKS NOTES

Check Out (0) Out (3) / Overdue (0) Account (\$0.00) Claims (0) / Lost (0) Holds (5) / Held (0) ILL (0) / Held (0) Reader Services

New Hold Cancel Reactivate Delete Suspend/Reactivate Fill Now Convert To ILL Deny More

<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS ▲
<input type="checkbox"/>	Droyd, Ann.	Goodnight iPad : a parody for the next generation	Book	E DROYD	9/30/2023	Shipped
<input type="checkbox"/>		Kitty's magic. Misty the scared kitten	Book	FICTION	7/23/2024	Pending

The hold shows up in real time on the holds report

Picklist Tyler Public Library REFRESH CLOSE

Pending (10) Located (1) Holds to Action (15) Unclaimed ILL (0)

Located Ask Me Later Missing Deny Properties INN-Reach Only

Filtered items | 3 of 10 total

<input type="checkbox"/>	COLLECTION	SHELF LOCATION	CALL NUMBER ▼	AUTHOR	TITLE	MATERIAL TYPE	PICKUP BRANCH	BARCODE	PENDING DATE
<input type="checkbox"/>	Juvenile		796.357 FIT	Fitzgerald, Ron.	Baseball. Becoming a great hitter	Book	OUTREACH	31995001102007	6/17/2024
<input type="checkbox"/>	Juvenile	Fiction	FICTION		Kitty's magic. Misty the scared kitten	Book	TYLER - Lobby	9781338316421	7/23/2024
<input type="checkbox"/>	Juvenile		Juv F Rowling	Rowling, J. K., 1965-	Harry Potter and the Order of the Phoenix	Book	TYLER - Lobby	54000001980567	5/24/2024

Item gets checked in

Fill hold request

Kitty's magic. Misty the scared kitten
Barcode: 9781338316421

satisfies a hold request for:
Jassim, Neamat
Barcode: 19561984
Phone: 475-400-2755
Notification option: Email Address
Exclude from hold notices: No

Do you want to hold the item?
(Click Cancel to stop the check-in/check-out process.)

YES
NO
CANCEL

Title no longer on holds report

Part of **Clarivate**

Picklist
Tyler Public Library
REFRESH
CLOSE

Pending (9)
Located (1)
Holds to Action (15)
Unclaimed ILL (0)

Located
Ask Me Later
Missing
Deny
Properties
INN-Reach Only
juv

Filtered items | 2 of 9 total

<input type="checkbox"/>	COLLECTION	SHELF LOCATION	CALL NUMBER	AUTHOR	TITLE	MATERIAL TYPE	PICKUP BRANCH	BARCODE	PENDING DATE
<input type="checkbox"/>	Juvenile		796.357 FIT	Fitzgerald, Ron.	Baseball. Becoming a great hitter	Book	OUTREACH	31995001102007	6/17/2024
<input type="checkbox"/>	Juvenile		Juv F Rowling	Rowling, J. K., 1965-	Harry Potter and the Order of the Phoenix	Book	TYLER - Lobby	54000001980567	5/24/2024

- Demonstrate how staff can place multiple Bibliographic-level holds on the same title, for the same patron record, with one action. For Book Groups - (checkboxes? A field to indicate quantity of holds?)

INNOVATIVE

Check Out (0)
Out (4) / Overdue (2)
Account (\$0.00)
Claims (0) / Lost (0)
Holds (0) / Held (0)
ILL (0) / Held (0)
Reader Services

New Hold
Cancel
Reactivate
Delete
Suspend/Reactivate
Fill Now
Convert To ILL
Deny
More

<input type="checkbox"/>	AUTHOR	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS
<input type="checkbox"/>						

Ask Me Later
Return
Add To Group
Remove From Group
Multiple Holds

Pick the titles that you want:

Find Tool - Bibliographic Record
✕

Bibliographic Record
Basic Search
Title
Keyword (All)

harry potter and the chamber of secrets
 ✕ ★ 🔍 📄 ☰

#	Title	Author	Format	Lin...	Hol...	Publi...	Call Number	Control...
<input checked="" type="checkbox"/>	Harry Potter and the Chamber of Secrets : a delux...	Vaux, Joe.	Book	7	2	2002	741.6420 On ...	803834
<input type="checkbox"/>	Harry Potter and the chamber of secrets [electroni...		Video ...	1	0	2002		888655
<input type="checkbox"/>	Harry Potter and the chamber of secrets [electroni...		Video ...	1	0	2002		888656
<input type="checkbox"/>	LEGO Harry Potter. Years 1-4 [electronic resource].		Video ...	1	1	2010	VGAM XB360 ...	888665
<input checked="" type="checkbox"/>	Harry Potter and the chamber of secrets : selected...	Williams, John, 1...	Book	1	1	2003	782.4215 On ...	803824
<input type="checkbox"/>	Harry Potter and the chamber of secrets	Rowling, J. K.	Audio ...	1	0	1999		888645
<input checked="" type="checkbox"/>	Harry Potter and the chamber of secrets [sound re...	Rowling, J. K., 19...	Sound ...	7	1	1999	CD Fic Rowling	708165
<input type="checkbox"/>	Harry Potter and the Chamber of Secrets	Rowling, J. K., 19...	Book	1	0	2003	FIC On Order ...	803804
<input type="checkbox"/>	Harry Potter and the chamber of secrets	Rowling, J. K., 19...	Large ...	2	1	2003	FIC On Order ...	803806
<input checked="" type="checkbox"/>	Harry Potter and the Chamber of Secrets	Rowling, J. K., 19...	Large ...	10	0	2000	FIC On Order ...	803870
<input type="checkbox"/>	Harry Potter and the Chamber of Secrets	Rowling, J. K., 19...	Book	2	0	2000	FIC On Order ...	803877

Ready
21 result(s)

Count Only
OPEN
CANCEL

Part of **Clarivate**

And they appear on the patron's card:

<input type="checkbox"/>	AUTHOR ▼	TITLE	FORMAT	CALL NUMBER	ACTIVATION DATE	STATUS	PICKUP BRANCH	QUEUE
<input type="checkbox"/>	Rowling, J. K., 1965-	Harry Potter and the chamber of secrets [sound recording]	Sound Recording		7/23/2024	Active	Tyler Public Library - Lobby	2
<input type="checkbox"/>	Rowling, J. K., 1965-	Harry Potter and the Chamber of Secrets	Large Print	FIC Row	7/23/2024	Pending	Tyler Public Library - Lobby	1
<input type="checkbox"/>	Vaux, Joe.	Harry Potter and the Chamber of Secrets : a deluxe pop-up book	Book		7/23/2024	Active	Tyler Public Library - Lobby	3
<input type="checkbox"/>	Williams, John, 1932-	Harry Potter and the chamber of secrets : selected themes from the motion picture	Book		7/23/2024	Active	Tyler Public Library - Lobby	2

For Book Groups, you can place multiple items on hold.

Find Tool - Item Record x

Item Record ▶ Basic Search ▶ All keyword fields ▶ Keyword (All) ▶

harry potter x ★ 🔍 📄

#	Title	Assi...	Coll...	Mat...	She...	Call...	V...	Stat...	Barcode	Last Acti...	R...	Co...
<input checked="" type="checkbox"/>	LEGO Harry Po...	Bedf...		Vid...	NEW	VG...		In	355555620...	4/13/2022	F...	17...
	Lego Harry Pott...	Bedf...		Vid...	NEW	XB...		In-Tr...	355555598...	4/30/2024	F...	17...
	Harry Potter an...	Bedf...		DV...		DVD		In			F...	17...
<input checked="" type="checkbox"/>	Harry Potter an...	Tyle...		DV...	Video	DVD		In	543512134...	5/29/2024	F...	17...
<input checked="" type="checkbox"/>	Harry Potter an...	Tyle...		DV...	Video	DVD		In			F...	17...
<input checked="" type="checkbox"/>	A Muggle's guid...	Car...		YA ...	Book	YA ...		In-Tr...	894358943...	12/8/2022	F...	16...
<input checked="" type="checkbox"/>	A Muggle's guid...	Red ...		Adu...	Book	Fic ...		Out	5463782910	5/29/2024	F...	16...
<input checked="" type="checkbox"/>	A Muggle's guid...	Pott...		Adu...	Book	Ficti...	FIC	On-...			F...	16...
<input checked="" type="checkbox"/>	A Muggle's guid...	Pott...		Adu...	Book	Ficti...	FIC	On-...			F...	16...
	A Muggle's guid...	Pier...			Book			On-...			F...	16...
	A Muggle's guid...	Pier...			Book			On-...			F...	16...

Ready 300 result(s)

Count Only

HOLDS2 System Hold Parameters and Holds Sequence

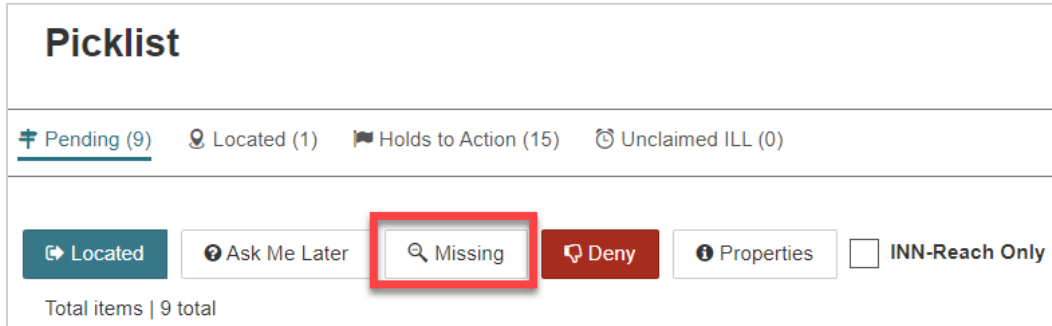
(We agreed to leave the SysAdmin and Holds Routing questions for the SysAdmin meeting).

- Hold Sequence. If the item is found but the library is unable to use the item to fill the hold, are there "no-fill" reasons that can be used/applied to explain why the item was not use to fill the hold? Is there the ability to change the item status to Trace, Mending, Part Missing, Damaged, etc. directly from the report screen?

Part of **Clarivate**

INNOVATIVE

The Picklist has the option to mark it “missing” but they can also click on the item and change the status.



The screenshot shows a 'Picklist' interface with the following elements:

- Summary: Pending (9), Located (1), Holds to Action (15), Unclaimed ILL (0)
- Buttons: Located, Ask Me Later, **Missing** (highlighted with a red box), Deny, Properties, INN-Reach Only (checkbox)
- Total items | 9 total

- Does changing an item's status to any status other than Available cause existing hold requests to be automatically removed from a library's pick list?

INNOVATIVE

Yes, when you change the status, it will remove the title from the picklist.

- Is item-level substitution available when filling holds from the pick list?

INNOVATIVE

If you have an item level request, by default that is the only barcode that can be used, however, you can use the “Fill now” feature, and fulfill the hold with any barcode from any bib you wish.

- If a patron has a hold on a BIB record and the hold request is on the pick list at Library A, will the patron's hold be filled by a walk-in check out of a different item on the same bibliographic record at Library B?

INNOVATIVE

Yes.

- If we set up a Local Holds system (item type, hold policy, custom status) in your software, confirm that the hold policy of “home” or “Local” would apply to all branches of a multi-branch library.

Part of **Clarivate**

INNOVATIVE

This depends on how you want it setup. If you want the settings to apply to all the branches in a multi-branch library, then your implementation manager will set it up this way.

PATRON1 Patron Record Creation

Follow-up question for a demonstrated functionality.

- Demonstrate that staff can delete entries from a patron's reading history? **Question:** Can this ability be set for specific access levels/login accounts? Or is it a global setting that allows anyone this access?

INNOVATIVE

Yes, a staff member can delete a specific entry from a patron's reading history. A library sets permission on who can view/edit the reading history.

	FORMAT	CHECKOUT DATE ▲	TITLE	AUTHOR	LIBRARY
<input checked="" type="checkbox"/>	Book	7/10/2024 7:54:06 AM	Gymnastics comeback	Maddox, Jake	Red Rock Public Library
<input type="checkbox"/>	Book	6/30/2024 10:50:41 AM	Kitty's magic. Misty the scared kitten		Red Rock Public Library

PATRON2 Patron Record Searching and Editing

- Is there a statistical field connected to the patron that will list the cumulative number of holds this patron has placed? **Dennis said Yes but was it shown to us?**

INNOVATIVE

No. This statistical field is not available.

- Is there a statistical field connected to the patron that will list the cumulative number of items that have expired on the hold shelf for this patron?

INNOVATIVE

No. This statistical field is not available.

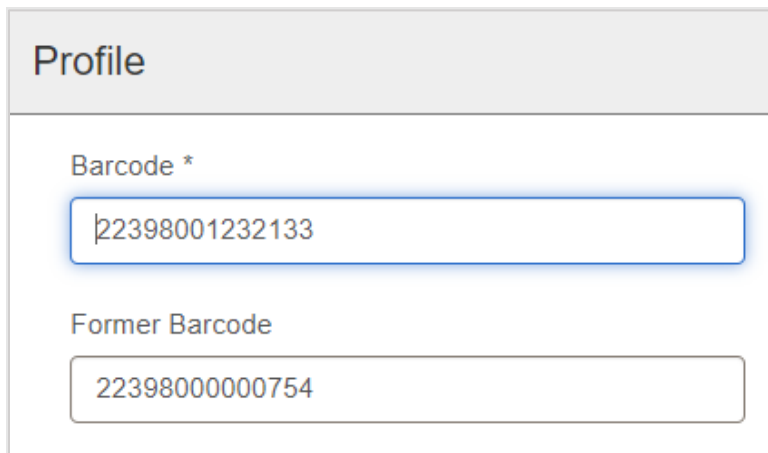
Part of **Clarivate**

PATRON3 Patron Blocks or Flags

- Is it possible to keep record of previous patron barcodes for referencing. If not directly through the patron record, then is there a report that would indicate which patron had a previously deleted barcode? (Alyssa/REE)

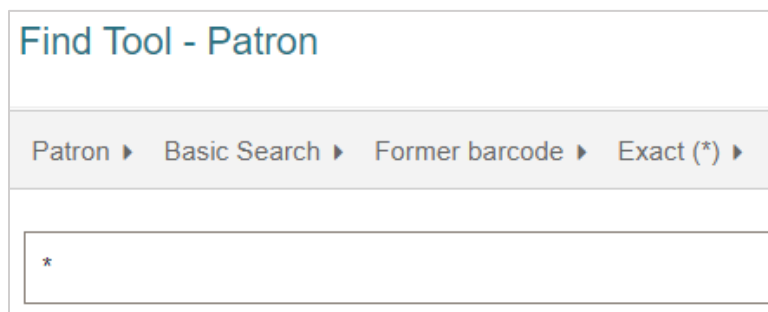
INNOVATIVE

Yes, you can view the previous barcode:



The screenshot shows a 'Profile' form with two input fields. The first field is labeled 'Barcode *' and contains the value '22398001232133'. The second field is labeled 'Former Barcode' and contains the value '22398000000754'.

From the "Find Tool", you can search for patrons with previous barcodes



The screenshot shows the 'Find Tool - Patron' search interface. It includes a breadcrumb trail: 'Patron > Basic Search > Former barcode > Exact (*) >'. Below the breadcrumb is a search input field containing an asterisk (*).

PATRON4 Patron Notices and Messaging

This entire checklist needs to be demonstrated as we ran out of time at the in-person session.

INNOVATIVE

This section will be demonstrated.

Part of **Clarivate**

- Demonstrate the selection of different delivery options for different types of notices.
- Demonstrate that Staff can set up default preferences for notices, including the option to digest multiple instances of the same notice type in one day.
- Demonstrate that the patron can select any notification option and update the settings from their PAC account. If a patron makes changes, how are the changes tracked/recorded?
- Demonstrate these Notice/Messaging options:

- Checkout receipt
- Checkin receipt
- Pre-overdue
- Overdue - 7 day, 14 day
- Final Overdue/Billing notice
- Hold Canceled
- Holds Available for pickup/Hold Filled
- Hold Expired on the hold shelf
- Patron record due to expire

- Demonstrate how staff can send email to the patron from the patron record and how/where that email is stored in the patron record.
- Demonstrate where, in a patron's record, you can see the types of notices, the delivery format of the notices and the content of the notices sent to the patron. Is this contained within the patron record or do staff have to link elsewhere from the patron record to access this information?
- Demonstrate where all Notes and Messages are stored in a patron's record. How far back in history are these records retained?