

Holdings in Polaris

Presented at: OHPUG 2014

By: Wes Osborn



Topics

Statistics

Requests

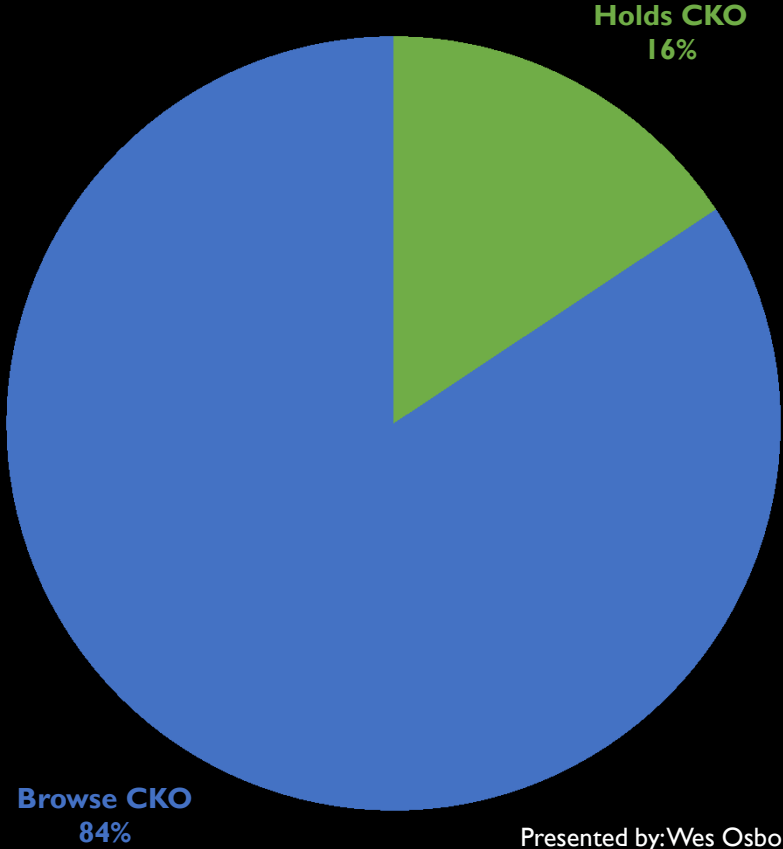
Fulfillment

Troubleshooting

Statistics

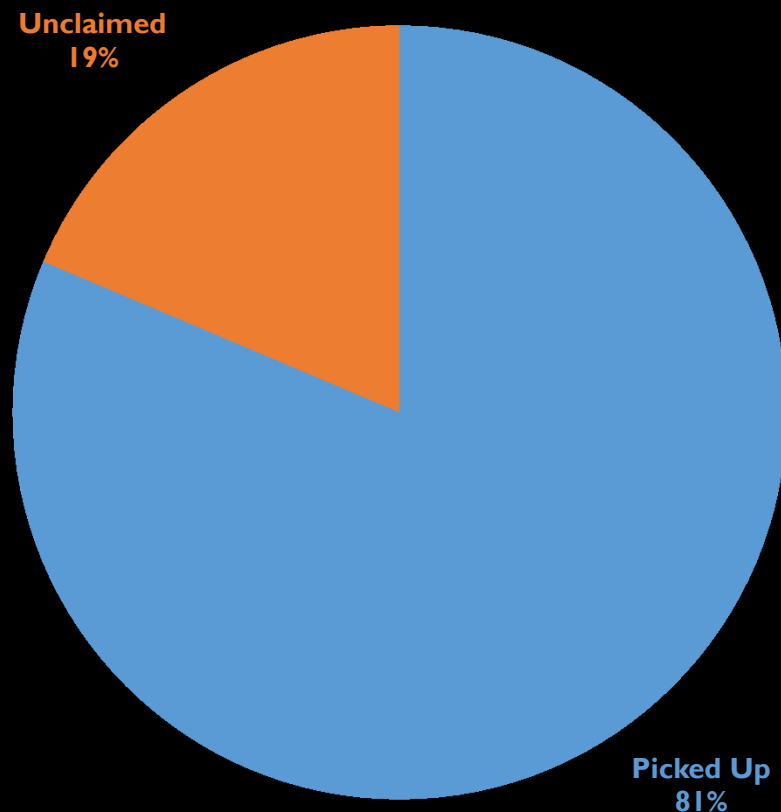
How much of an impact are holds on the system?

Statistics - Circulation



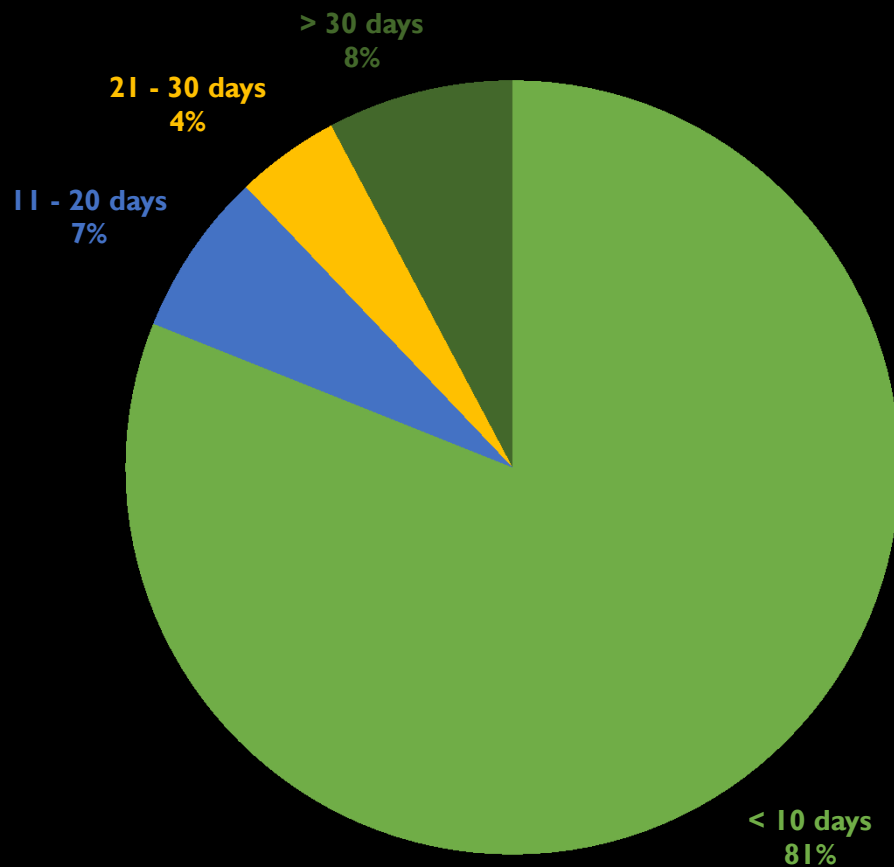
Presented by: Wes Osborn; OHPUG 2014

Statistics - Unclaimed



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Statistics – Wait Time



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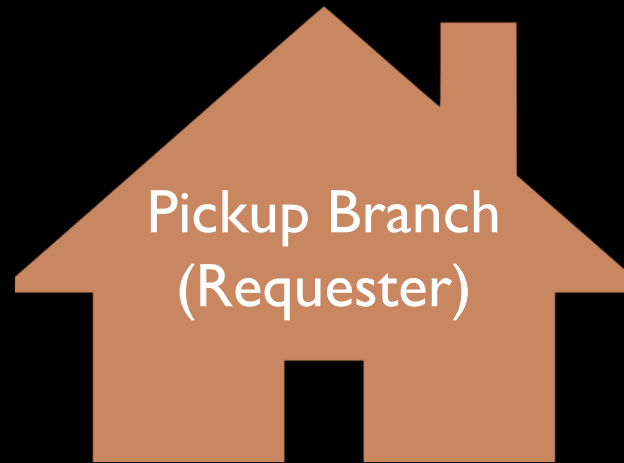
Statistics – Troubleshooting



Frustration

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Terminology



Requests

Allowing patrons to place items on hold

Caution – Changes coming

New versions of Polaris may do things differently, the following slides were tested with Polaris 4.1r2 build 1036

The Item Record

Item Record 4183173 - Cataloging - Polaris

File Edit View Links Tools Help

Barcode: 1330790476 Record status: Final ILL Ebook Non-circulating Display in PAC

Title: Harry Potter and the sorcerer's stone Bib control no.: 1322439

Author: Rowling, J. K. Parent item: Item control no.: 4183173

Call number: J Fiction Rowling Price: \$24.95 Issue control no.:

Owner: CML Tech Services (br) Shelf location: (None)

Assigned: CML Karl Road Branch (C-KAR) Temporary location:

Collection: (None) Circulation status: Held 8/14/2014 9:23:52 AM

Circulation parameters

Material type: Juvenile Book

Loan period: Juvenile Book

Fine code: Juvenile Book

Renewal limit: 10

Stat code: (None)

Name of piece:

Issue:

Call number

Scheme: Dewey Decimal

Prefix: J Fiction

Class:

Cutter: Rowling

Suffix:

Vol:

Copy:

Request

Loanable outside system

Holdable

Limit to:

Pickup at this branch

Patrons from this library and branches

Patrons from this branch only

Preferred borrowers

For Help, press F1

Presented by Wes Osborn, OHPUC 2014

The Item Record - Request

Request

Loanable outside system

Holdable

Limit to:

Pickup at this branch

Patrons from this library and branches

Patrons from this branch only

Preferred borrowers

Loanable outside system: ILL

Holdable: Must be Checked

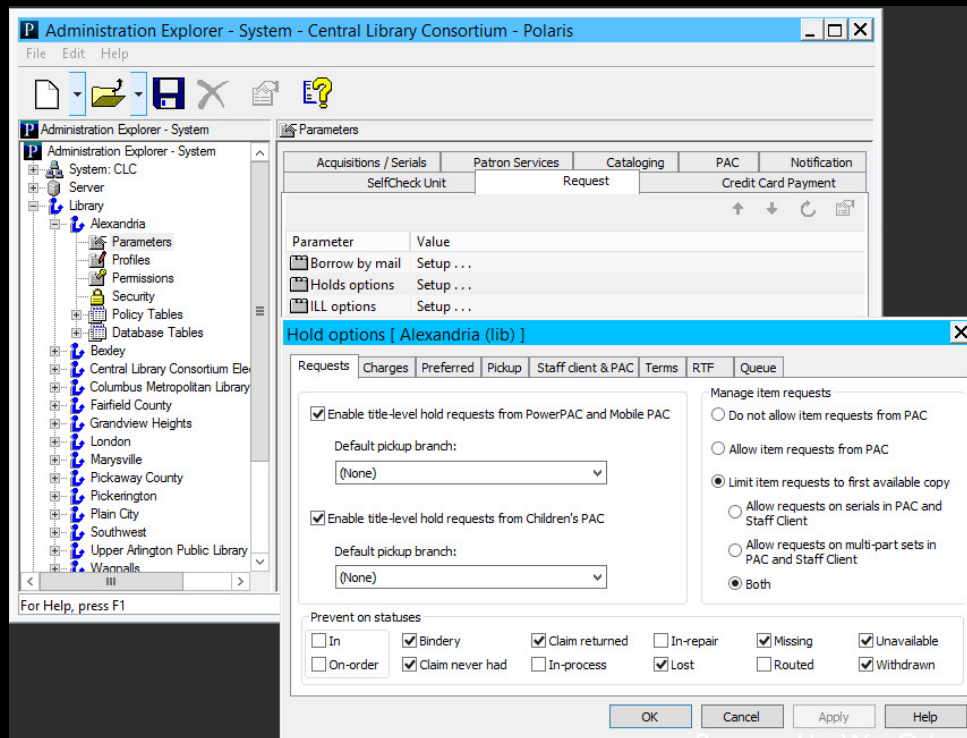
Limit to: Nothing checked =

Anyone can place on hold

The Item Record – Circulation Status

Circulation status:	Held	8/14/2014 9:23:52 AM
	Request	

Polaris System Administration Library -> Request -> Holds options



Hold Options -> Requests

Hold options [Alexandria (lib)]

Requests | Charges | Preferred | Pickup | Staff client & PAC | Terms | RTF | Queue

Enable title-level hold requests from PowerPAC and Mobile PAC

Default pickup branch:
(None) ▾

Enable title-level hold requests from Children's PAC

Default pickup branch:
(None) ▾

Manage item requests

Do not allow item requests from PAC

Allow item requests from PAC

Limit item requests to first available copy

Allow requests on serials in PAC and Staff Client

Allow requests on multi-part sets in PAC and Staff Client

Both

Prevent on statuses

<input type="checkbox"/> In	<input checked="" type="checkbox"/> Bindery	<input checked="" type="checkbox"/> Claim returned	<input type="checkbox"/> In-repair	<input checked="" type="checkbox"/> Missing	<input checked="" type="checkbox"/> Unavailable
<input type="checkbox"/> On-order	<input checked="" type="checkbox"/> Claim never had	<input type="checkbox"/> In-process	<input checked="" type="checkbox"/> Lost	<input type="checkbox"/> Routed	<input checked="" type="checkbox"/> Withdrawn

OK Cancel Apply Help

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Hold Options -> Preferred

Item Record

The image shows a software interface for managing library holds. On the left, a window titled "Hold options [Alexandria (lib)]" has several tabs: "Requests", "Charges", "Preferred", "Pickup", "Staff client & PAC", "Terms", "RTF", and "Queue". The "Preferred" tab is active, showing a list of "Preferred borrowers" with checkboxes next to each name. A blue arrow points from this list to the right. On the right, an "Item Record" dialog box is open, showing options for "Request" and "Limit to:". The "Preferred borrowers" checkbox is selected in the "Limit to:" section.

Hold options [Alexandria (lib)]

Requests Charges Preferred Pickup Staff client & PAC Terms RTF Queue

Preferred borrowers:

- Alexandria Public Library
- CLC Electronic Library
- Grandview Heights Public Library
- Fairfield County Main Library
- Fairfield County Johns Branch
- Fairfield County Baltimore Branch
- Fairfield County Bremen Branch
- Fairfield County Northwest Branch
- Plain City Public Library
- Marysville Public Library
- MPL Raymond Branch
- Pickaway County Library Main

Request

- Loanable outside system
- Holdable

Limit to:

- Pickup at this branch
- Patrons from this library and branches
- Patrons from this branch only
- Preferred borrowers

OK Cancel Apply

Hold Options -> Pickup (double negative)

Hold options [Alexandria (lib)]

Requests Charges Preferred Pickup Staff client & PAC Terms RTF Queue

Pickup branches to exclude in PAC when creating requests:

- Alexandria Public Library
- Bexley Public Library
- CLC Electronic Library
- CML Columbus Main Library
- CML Driving Park Branch
- CML Dublin Branch
- CML Franklinton Branch
- CML Gahanna Branch
- CML Hilliard Branch
- CML Hilltop Branch
- CML ILL
- CML Karl Road Branch

Exclude selected branches in staff client

Placing a request will log you in to the system. Don't forget to log out.

Barcode: *****6580 **Follows Patron's Registered Branch**

Pickup Library: Fairfield County Main Library

Activation Date: (ex: mm/dd/yy) 8/14/2014

Submit Request Cancel

OK Cancel Apply Help

Presented by: Wes Osborn; OHPLUG 2014

Hold Limits Options

Total Holds by Patron Code

Material Loan Limit

Video G

Video PG

Video PG13

Video R

Policy Table – Patron / Material Loan Limit

Patron / Material Type Loan Limit Blocks

Organization	Patron Code	1st Level Fine	2nd Level Fine	Total Item Limit	Total Overdue	Total Holds	To
Grandview Heigh...	Full Access	\$1.99	\$9.99	100	10	75	
Grandview Heigh...	Homebound	\$1.99	\$9.99	100	10	75	
Grandview Heigh...	ILL/MORE	\$999.00	\$999.00	999	999	999	
Grandview Heigh...	In House	\$999.00	\$999.00	350	160	999	
Grandview Heigh...	Institutions	\$1.99	\$9.99	100	10	75	
Grandview Heigh...	Key Customers	\$1.99	\$9.99	100	10	75	
Grandview Heigh...	Restricted 1	\$1.99	\$9.99	100	10	75	
Grandview Heigh...	Restricted 2	\$1.99	\$9.99	100	10	75	

Organization	Patron Code	Material Type	Maximum Item Limit	Hold Limit
Grandview Heigh...	Full Access	Audio Book	100	75
Grandview Heigh...	Full Access	Video G	20	75
Grandview Heigh...	Full Access	Video PG	20	75
Grandview Heigh...	Full Access	Video PG-13	20	75
Grandview Heigh...	Full Access	Video R	20	75

Presented by: Y (15 row(s)) OHPUG 4 Wosborn

A battle of the settings – Who wins?

Total Holds = 5

Material Loan Limit

Video G = 10

Video PG = 10

Video PG13 = 10

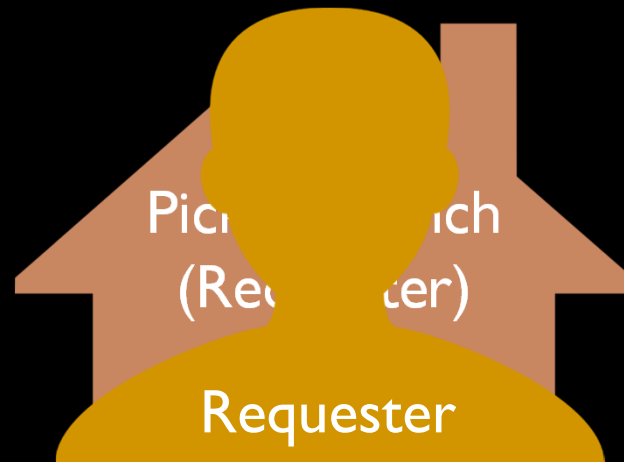
Video R = 10

Fulfillment

Diving into the Request To Fill (RTF) process and determining what order holds get filled in

Presented by: Wes Osborn; OHPUG 2014

Terminology - Refresher



The Requester – Pickup Location

Hold Request - 8228216 - Test title number 4 for CLC AV Stuff - General

File Edit View Links Tools Help

Request

Status: Requested 8/18/2014 Request date: 8/18/2014 Activation: 8/18/2014

Pickup: Alexandria Public Library (ALEM) Origin: Library Expiration: 4/15/2015

This item only

Patron

Barcode: 21868001586580 Find Registered at: Fairfield County Main Library

Name: WES OSBORN Patron code: Staff

Notification option: Phone

Details

Title: Test title number 4 for CLC AV Stuff Find

Author: est, author. ISBN/ISSN: 23456789

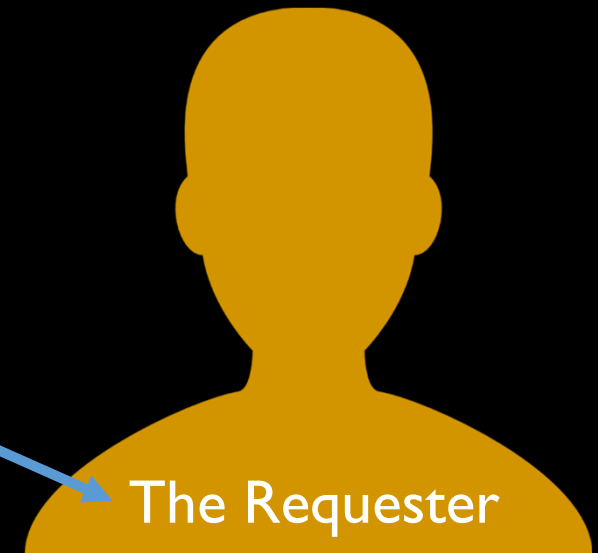
Publisher: Date: 1998 Edition:

Series: LCCN: Format: Book

Item barcode: Call no.: Pages:

Volume: Issue: Serial copy:

For Help, press F1 Record Saved NUI



The Responder - Owner

Record 4183173 - Cataloging - Polaris

File View Links Tools Help

Barcode: Record status:

Title:

Author:

Call number:

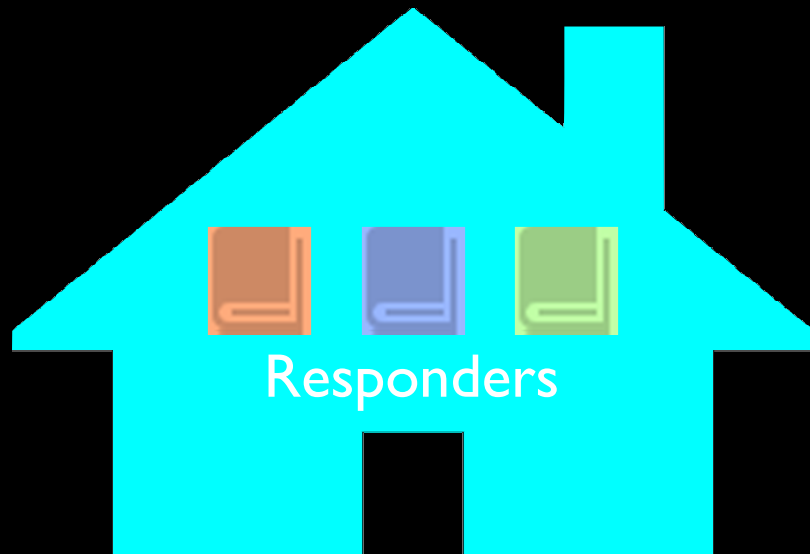
Owner: SH

Assigned: Te

Collection: Ci



Many Books – One Person



RTF – Which Responders?

For a particular Requester (pickup location), which responders (item owners) can fill the request?

Review the Policy tables

Holds Routing Sequences Primary

Holds Routing Sequences Secondary

Why two tables? More control over the fulfillment process.

Why do we want to control the RTF?

Balance the amount of material a library is lending to others with what they are borrowing from others

Use material purchased by multi-branch systems to fulfill requests within their own library system

Reduce the geographic distance material has to travel

Speed up the fulfillment process

Many Books – One Person – ALE Example



Holds Routing Sequences Primary

Administration Explorer - System - Central Library Consortium - Polaris

File Edit Help

Administration Explorer - System

- Parameters
- Profiles
- Permissions
- Security
- Policy Tables
 - Addresses
 - Authority Overlay Retention
 - Authority Record Import: Preferred Catalog
 - Bibliographic Tags to Retain/Delete
 - Claim Reasons
 - Contact Persons
 - Countries
 - Course Reserves: Course Names
 - Course Reserves: Course Terms
 - Course Reserves: Departments
 - Course Reserves: School/Divisions
 - Cross Reference Display Constants
 - Currencies
 - Dates Closed
 - Fee Descriptions
 - Fine Codes
 - Fines
 - Floating: To Branch
 - Floating: Material Types
 - Floating: Material Type Limits
 - Fund Categories
 - Holds Routing Sequences Primary
 - Holds Routing Sequences Secondary
 - Initial Articles
 - Item Availability Display Order
 - Item Statistical Class Codes

Holds Routing Sequences Primary

Requester Branch	Responder Branch	Sequence	Days at branch
Alexandria Public...	Alexandria Public Li...	1	5
Alexandria Public...	CML Dublin Branch	2	5
Alexandria Public...	CML Gahanna Bran...	3	5
Alexandria Public...	CML Hilliard Branch	4	5
Alexandria Public...	CML Hilltop Branch	5	5
Alexandria Public...	CML Karl Road Bra...	6	5
Alexandria Public...	CML Columbus Ma...	7	5
Alexandria Public...	CML New Albany B...	8	5
Alexandria Public...	CML Reynoldsburg ...	9	5
Alexandria Public...	CML Southeast Bra...	10	5
Alexandria Public...	CML Whetstone Br...	11	5
Alexandria Public...	CML Linden Branch	12	5
Alexandria Public...	CML Livingston Bra...	13	5
Alexandria Public...	CML Martin Luther ...	14	5
Alexandria Public...	CML Northern Ligh...	15	5
Alexandria Public...	CML Northside Bra...	16	5
Alexandria Public...	CML Parsons Branch	17	5
Alexandria Public...	CML Shepard Branch	18	5
Alexandria Public...	CML Weinland Bra...	19	5
Alexandria Public...	CML South High Br...	20	5
Alexandria Public...	CML Whitehall Bra...	21	5

Holds Routing Sequences Secondary

The screenshot shows the Administration Explorer interface for the Central Library Consortium - Polaris. The left sidebar displays a tree view of system parameters, with 'Holds Routing Sequences Secondary' selected. The main window displays a table with the following data:

Requester Branch	Responder Branch	Sequence	Days at branch
Alexandria Public...	Alexandria Public Li...	1	1
Alexandria Public...	CLC Electronic Libr...	2	5
Alexandria Public...	Grandview Heights ...	3	5
Alexandria Public...	Fairfield County Ma...	4	5
Alexandria Public...	Fairfield County Jo...	5	5
Alexandria Public...	Fairfield County Bal...	6	5
Alexandria Public...	Fairfield County Bre...	7	5
Alexandria Public...	Fairfield County No...	8	5
Alexandria Public...	Plain City Public Li...	9	1
Alexandria Public...	Marysville Public Li...	10	5
Alexandria Public...	MPL Raymond Bra...	11	5
Alexandria Public...	Pickaway County Li...	12	5
Alexandria Public...	PCL Outreach	13	5
Alexandria Public...	PCL Younkin Branch	14	5
Alexandria Public...	Pickerington Public...	15	5
Alexandria Public...	Wagnalls Memorial...	16	5
Alexandria Public...	FCDL Outreach Ser...	17	5
Alexandria Public...	SPL Grove City	18	5
Alexandria Public...	SPL Westland	19	5
Alexandria Public...	WL Northwest	20	5
Alexandria Public...	WL Old Worthington	21	5
Alexandria Public...	WL Worthington Pa...	22	5
Alexandria Public...	WL Old Worthingto...	23	5
Alexandria Public...	WL Northwest Aft...	24	5
Alexandria Public...	CML Dublin Branch	25	5
Alexandria Public...	CML Franklinton Br...	26	5

JG 2014

SA Parameters for RTF

Hold options [Alexandria Public Library (br)]

Requests Charges Preferred Pickup Staff client & PAC Terms RTF Queue

Allow only one cycle in Primary RTF

Allow only one cycle in Secondary RTF

Randomize Primary RTF

Randomize Secondary RTF

When no items in Primary RTF, transfer immediately

Total days in Primary RTF Cycle: 90

Total days in Secondary RTF Cycle: 90

Default not-supplied reason (System level only):

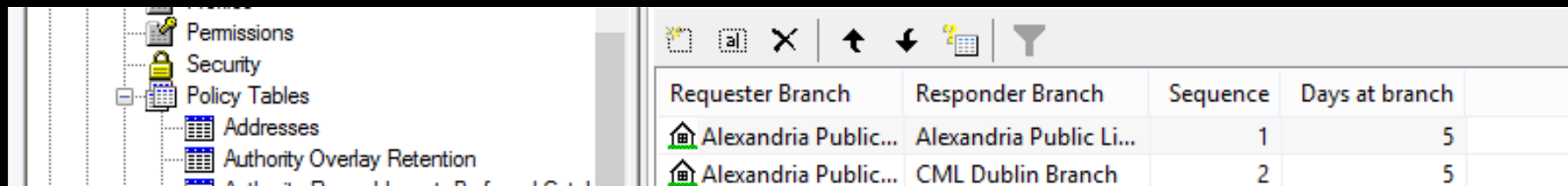
If all material limits exceeded, set to Not Supplied

OK Cancel Apply Help

Presented by Wes Osborn, AUG 2014

Pop Quiz

How would you handle a branch closure?



The screenshot shows a software interface with a tree view on the left and a table on the right. The tree view includes 'Permissions', 'Security', 'Policy Tables', 'Addresses', and 'Authority Overlay Retention'. The table has four columns: 'Requester Branch', 'Responder Branch', 'Sequence', and 'Days at branch'. It contains two rows of data.

Requester Branch	Responder Branch	Sequence	Days at branch
Alexandria Public...	Alexandria Public Li...	1	5
Alexandria Public...	CML Dublin Branch	2	5

Visit the primary and secondary for all REQUESTERS

Remove the RESPONDER branch

Re-sequence the entire table

Enjoy all the error messages & frustration

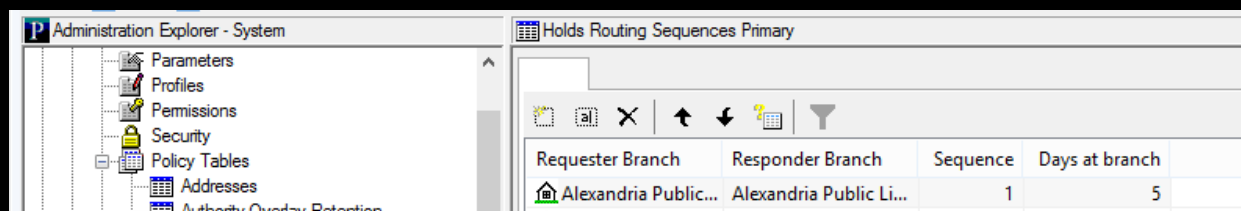
Or ask CLC for Mike's re-sequencing script

Many Books – One Person

Which copy will fulfill the request?



Alexandria copy is locked first because they were the first in the primary routing sequence



The screenshot shows a software interface with a tree view on the left and a table on the right. The tree view includes folders for Parameters, Profiles, Permissions, Security, Policy Tables, Addresses, and Authority Overlay Retention. The table, titled 'Holds Routing Sequences Primary', has the following data:

Requester Branch	Responder Branch	Sequence	Days at branch
Alexandria Public...	Alexandria Public Li...	1	5



When does the locking occur?

Request Manager - Hold Requests

File View Tools Help

Branch name: Alexandria Public Library (ALEM) By: Item Status: Active

Requests

Collect...	Shelf...	Call Nu...	Author	Title	Format	Pickup ...	Barcode	Pending Date
Fic	Adult F...	Fiction Cla	Clayton,...	The Wednesday sisters	Book	C-ARD	32973001073170	8/17/2014
JAB	Book ...	Book & C...	Berkner,...	The story of my feelings	Book	WWPK	32973001069863	8/17/2014
JF	Juveni...	Valentine...	Higginson...	Minnie's valentine	Book	PCLYB	32973001066240	8/17/2014
JN	Juveni...	J 398.8 Gus		Favorite nursery rhymes ...	Book	UA-T	32973001054089	8/18/2014
JV	Childr...	NVC Chil...		Finding Nemo	Videotape	SPLGC	32973000769950	8/18/2014
JV	N-Fami...	VC N 286		Our lips are sealed	Videotape	SPLGC	32973000624171	8/18/2014
Mus	Music 10s	CD 2010...	Bowie, D...	A reality tour	Music CD	C-NOR	32973001163799	8/18/2014
Mus	Music 10s	CD 2010...	Hollywoo...	American tragedy	Music CD	SPLWL	32973001368364	8/18/2014
Mus	Music 70s	CD 70's 141	Bowie, D...	Earthling	Music CD	MPLM	32973000414516	8/18/2014
Mus	Music 70s	CD 70's 152	Bowie, D...	Changes/Bowie	Music CD	MPLM	32973000387779	8/18/2014
Mus	Music 70s	CD 70's ...	Grateful...	Live at the Cow Palace N...	Music CD	C-WHE	32973001295195	8/17/2014
Mus	Music 80s	CD 80's 178	Jackson,...	Joe Jackson greatest hits	Music CD	SPLWL	32973000436097	8/17/2014
Mus	Music 80s	CD 80's 193	Ramones...	All the stuff (and more). V...	Music CD	C-WHE	32973000455295	8/17/2014
Mus	Music 90s	CD 90's 485		If I were a Carpenter	Music CD	WOWL	32973000406488	8/17/2014
Mus	Music...	CD Count...	Swift, Ta...	Taylor Swift	Music CD	C-NOR	32973001291368	8/18/2014

For Help, press F1 Number: 39 Bindings: Aug 18 2014 12:27PM [RT]: Aug 18 2014 5:59AM NUM ...

Bindings VS RTF in Request Manager

Bindings

Process runs every 5 minutes

Creates list of possible items that could fill request

Any available copy in the request's PRIMARY routing sequence list can now fulfill request if the item is checked in

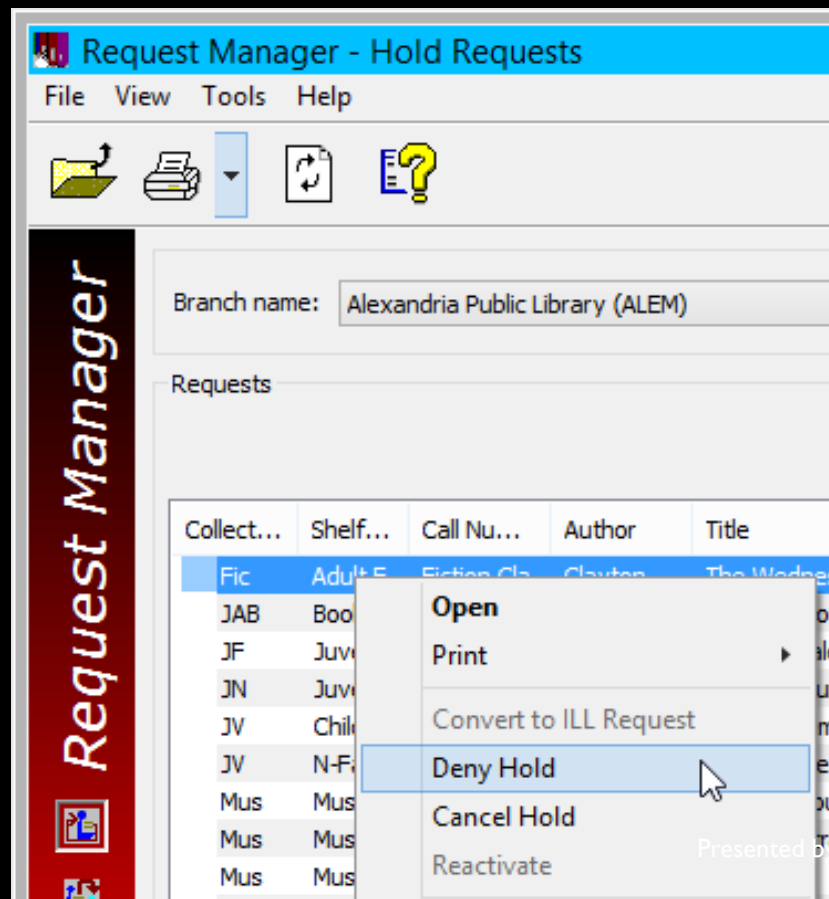
RTF

Runs once a day at 5am (for now)

Locks the list of items for the responding branches

ANY available copy in EITHER routing sequence could fulfill request if the item is checked in

Puppies die when you Deny Holds



This item will NEVER be able to fill the request (even if you find it on the shelf later)

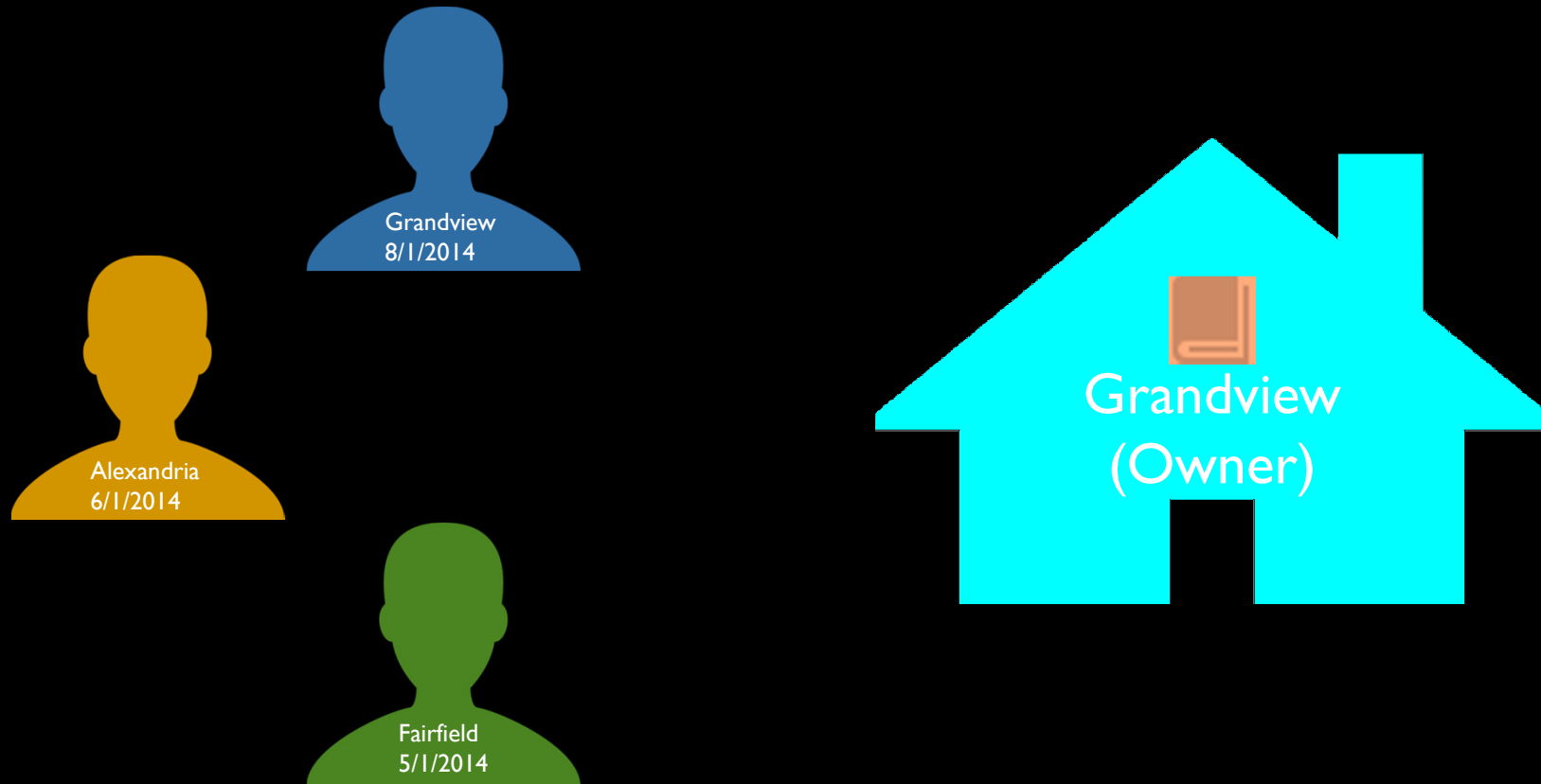
Instead mark item as Missing

Suggest removing the permission altogether

But what about lines?

How Polaris picks who will get the next available copy when there is a wait-list

Many People – One Book



Presented by: Wes Osborn; OHPUG 2014

Which request should Polaris fill first?

Bibliographic Record 1931956 : Linked Hold Reque

File Edit Help

Patron Library	Hold Status	Pick-up Library
Pickerington Publ...	Requested	Pickerington Publ...
CML Northern Lig...	Requested	CML Northern Lig...
CML Reynoldsbur...	Requested	CML Reynoldsbur...
WL Old Worthingt...	Requested	WL Northwest
CML South High ...	Requested	SPL Grove City
CML Columbus ...	Requested	WL Old Worthingt...
Marysville Public ...	Requested	Marysville Public ...
WL Northwest	Requested	WL Northwest
CML Gahanna Bra...	Requested	CML Gahanna Bra...
SPL Grove City	Requested	SPL Grove City
Plain City Public L...	Requested	Plain City Public L...
WL Northwest	Requested	WL Northwest
CML Gahanna Bra...	Cancelled	CML New Albany ...

For Help, press F1

Presented by 320 records born: OHPLUG 2014

Bibliographic Record 1931956 : Linked Item Records

File Edit Help

Title	Assigne...	Collec...	Mat...	Shelf...	Call N...	Vo...	Stat...	Barcode	Last Acti...	R..	Contr...
The book of life	Bexley P...	Fiction...	Book	New...	HARK...		Out	MIVBT	7/30/2014	F..	58415...
The book of life	CML Co...	Fantas...	Book	NEW...	Fiction...		Held	1335987107	8/18/2014	F..	50037...
The book of life	CML Co...	Quick ...	Book		Fiction...		Out	1336451739	7/15/2014	F..	57848...
The book of life	CML Co...	Quick ...	Book		Fiction...		Out	1336451741	8/16/2014	F..	57848...
The book of life	CML Co...	Quick ...	Book		Fiction...		In	1336451787	8/12/2014	F..	57848...
The book of life	CML Co...	Quick ...	Book		Fiction...		Out	1336451770	8/16/2014	F..	57848...
The book of life	CML Co...	Quick ...	Book		Fiction...		Out	1336451772	8/18/2014	F..	57848...
The book of life	CML Co...	Quick ...	Book		Fiction...		Out	1336451773	8/1/2014	F..	57848...
The book of life	CML Co...	Quick ...	Book		Fiction...		Out	1336451732	8/13/2014	F..	57848...
The book of life	CML Co...	Quick ...	Book		Fiction...		Out	1336451725	7/24/2014	F..	57848...
The book of life	CML Co...	Quick ...	Book		Fiction...		Out	1336451743	8/13/2014	F..	57848...
The book of life	CML Co...	Quick ...	Book		Fiction...		Out	1336451793	8/17/2014	F..	57848...
The book of life	CML Dri...	Quick ...	Book		Fiction...		Out	1336451786	7/15/2014	F..	57848...

For Help, press F1

187 records

Sys Admin -> Hold Options -> Queue tab

Hold options [Central Library Consortium (sys)]

Requests Charges Preferred Pickup Staff client & PAC Terms RTF Queue

Trapping Preference

None

Prefer my location

Prefer my patron



Prefer check-in location













Maintain Queue Position

If suspended/inactive

If re-activated

Preference Group

Group 1   Group 1 has 6 members.

-  Fairfield County Baltimore Branch [Patron] [Grp: 1] ^
-  Fairfield County Bremen Branch [Patron] [Grp: 1]
-  Fairfield County Johns Branch [Patron] [Grp: 1]
-  Fairfield County Main Library [Patron] [Grp: 1]
-  Fairfield County Northwest Branch [Patron] [Grp: 1]
-  FCDL Outreach Services [Patron] [Grp: 1]
-  Grandview Heights
-  London
-  Marysville
-  Pickaway County
-  Pickerington
-  Plain City

Presented by: Wes Osborn © PUG 2014

OK Cancel Apply Help

The Queue Tab Options

Groups – Treat multiple branches within the Group equally

“Lump” together library systems

Create geographic zones

Adjust the wait list trapping preference

None = First come, first served

My patron = Item's assigned branch matches patron's branch

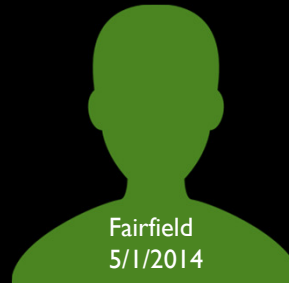
My location = Pickup location matches assigned location

Check-in = Pickup branch matches check-in location

Many People – One Book – Prefer My Patron



Owned by:
Grandview



Presented by: Wes Osborn; OHPUG 2014

Troubleshooting

How to find weird things and what to do about them

Presented by: Wes Osborn; OHPUG 2014

Troubleshooter's best friend – Notes View

Hold Request - 8213333 - So long, insecurity you've been a bad friend to us - Notes

File Edit View Links Tools Help

Request

Status: Active 8/17/2014 Request date: 8/16/2014 Activation: 8/16/2014

Pickup: CML Hilliard Branch (C-ARD) Origin: Patron Expiration: 5/11/2017

This item only

Notes

Staff display: Patron:

Non-public: PAC display:

Request History

Date	Status	User Name	Branch
8/16/2014 10:43:0...	Requested	OPAC Default	
8/17/2014 5:52:33...	Active	PolarisExec	CML Dublin Br...

Request Satisfied By

Bib Cont...	Item Barcode	Status	Branch	Not...
877833	1316404126	Out	CML Whetston...	
877833	1316404175	In	CML Dublin Bra...	
877833	1316404159	Out	CML South Hig...	
877833	1316404183	In	CML Dublin Bra...	
877833	1315392553	In	SPL Grove City	
877833	1296503889	Out	WL Old Worthi...	
877833	1296503939	In	WL Northwest	

For Help, press F1

First Available Copy Requests

Allowing patrons to get only the copy they want... sort of

Presented by: Wes Osborn; OHPUG 2014

Allowing First Available Copy Requests

Allows any item records that share similar characteristics to fill hold requests

Magazines that are the same issue, travel books that are the same year

Hold options [Central Library Consortium (sys)]

Requests Charges Preferred Pickup Staff client & PAC Terms RTF Queue

Enable title-level hold requests from PowerPAC and Mobile PAC

Default pickup branch:
(None) ▾

Enable title-level hold requests from Children's PAC

Default pickup branch:
(None) ▾

Manage item requests

Do not allow item requests from PAC

Allow item requests from PAC

Limit item requests to first available copy

Allow requests on serials in PAC and Staff Client

Allow requests on multi-part sets in PAC and Staff Client

Both

See Help File “First Available Copy requests”

First Available Copy Requests

Hold Request




Request			
Status:	Requested	4/16/2014	Request date: 4/11/2014
Pickup:	CML Reynoldsburg Branch (C-REY)	Origin: Library	Activation: 4/11/2014
<input type="checkbox"/> This item only		Expiration: 1/ 4/2017	
Patron			
Barcode:	<input type="text"/>	Registered at:	CML Reynoldsburg Branch (br)
Name:	<input type="text"/>	Patron code:	Full Access
		Notification option:	Phone 1
Find			
Details			
Title:	Public secrets		Find
Author:	Roberts, Nora.	ISBN/ISSN:	0553106554 :
Publisher:	Bantam Books,	Date:	2009
Series:		Edition:	
		Format:	Book
Item barcode:		LCCN:	96037313
		Pages:	
Volume:	ROMANCE	Call no.:	
		Serial copy:	
		Pres. Issued by:	Wes Osborn; OHPUG 2014


First Available Copy Requests – Linked Items

Bibliographic Record 114215 : Linked Item Records

File Edit Help



Title	Assigned Bran...	Collection	Material ...	Shelf Loc...	Call Number	Volume	Status
Public secrets	Alexandria Pu...	Fiction (Fic)	Book	Adult Fic...	Fiction Rob		In
Public secrets	Bexley Public ...	Paper Rom...	Paperback		ROBERTS, P...		Lost
Public secrets	Bexley Public ...	Paper Rom...	Paperback		ROBERTS, P...		In
Public secrets	Grandview Hei...	Fiction (Fic)	Book	Fiction	Fic ROB		In
Public secrets	London Public...	Fiction (Fic)	Book		FIC ROB		Withdr...
Public secrets	Marysville Pub...	Fiction (Fic)	Book	Adult Fic...	F ROB		In
Public secrets	Marysville Pub...	Fiction (Fic)	Book	Adult Fic...	F ROB		Out
Public secrets	PCL Outreach	Fiction (Fic)	Book		ADULT FIC ...		In
Public secrets	PCL Younkin ...	Fiction (Fic)	Book		ADULT FIC ...		In
Public secrets	Pickaway Cou...	Paper Fictio...	Book		PAPER FICT...		Withdr...
Public secrets	Pickaway Cou...	Paper Fictio...	Book		PAPER FICT...		In
Public secrets	Pickaway Cou...	Fiction (Fic)	Book		ADULT FIC...		In
Public secrets	Plain City Publ...	Fiction (Fic)	Book	Adult Fic...	FIC ROB		In
Public secrets	SPL Grove City	Fiction (Fic)	Book		FICTION ROB		Withdr...
Public secrets	SPL Westland	Fiction (Fic)	Book		FICTION ROB		Withdr...
Public secrets	UA Tremont R...	Fiction (Fic)	Book		Romance R...		Missing



Finding bogus First Available Copy Requests

Hold Request Find Tool SQL:

```
select distinct shr.SysHoldRequestID
from polaris.polaris.SysHoldRequests shr
left join polaris.polaris.ItemRecordDetails ird
      on shr.VolumeNumber = ird.VolumeNumber
where ird.ItemRecordID is null and shr.SysHoldStatusID in ( 1,3,4 ) and
shr.VolumeNumber is not null
```

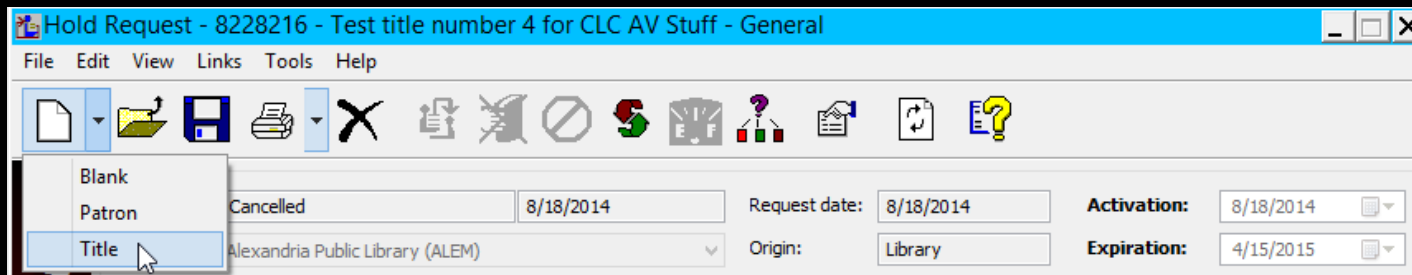
Hey III, make Volume requests (good or bad) easier to find!

How to Fix? Cancel, Copy, Delete

Cancel Existing Request



Copy Existing Request to create a non-Volume request



Delete "bad" Request



Material type limits gone wrong

Your request will be filled... eventually

Available Material Limit settings

Material Loan Limit

Video G = 10

Video PG = 10



Video PG/3 = 10

Video R = 10

What happens if a title has mixed Material Types?

The Blue X of Death

Request Satisfied By

Bib Con...	Item Barcode	Status	Branch	Not Supplied .
398363	302310081...	Out	Marysville Pu...	
 398363	318700079...	Held	Grandview H...	Not Holdable
 398363	318680156...	Transferred	Fairfield Cou...	Not Holdable

The items with the Blue X will NEVER be able to fill this hold request, they have been denied by Polaris. This slows fulfillment time for the patron.

Why the Blue X happens

Bib Record that has item records with mixed material types

+

Patron exceeds request limit in SOME material types

=

Permanent Blue X of death
(for items with a material type that the patron exceeded)

Finding Blue X requests

Create a SQL View using code found on CLC's website

Then add the view to the Hold Request Find Tool

```
select SysHoldRequestID from  
polaris.dbo.Custom_HoldsWithNotSuppliedItems where activationdate  
< dateadd(day,-14,getdate())
```


Finding Blue X requests

Hold Requests - SQL Search Find Tool

File Edit Tools Options Help

General Settings Scoping Branches Collections Databases

Object: Hold Requests Open: Hold Requests with Not Supplied It

Search Mode
 Normal
 Power
 SQL
 Count Only

SQL Search Criteria:
select SysHoldRequestID from polaris.dbo.CLC_Custom_HoldsWithNotSuppliedItems where activationdate < dateadd(day,-14,getdate())

Date	Status	Title	Format	Pickup Bran...
7/22/2014	Requested	The Bear detectives : the case of the ...	Book	Pickeringto...
6/1/2014	Requested	Full house. Season 1	DVD	Pickeringto...
7/1/2014	Requested	Full house. Season 1	DVD	Fairfield Co...
8/2/2014	Requested	The wild wild West. The first season	DVD	London Pu...
8/4/2014	Requested	The innocent man	Audio Books	London Pu...
7/26/2014	Requested	Criminal minds. The first season	DVD	SPL Westland
8/2/2014	Requested	Supernatural. Season 2	DVD	Fairfield Co...
7/2/2014	Requested	Criminal minds. The second season	DVD	WL Northw...
6/13/2014	Requested	Full house. Season 5.	DVD	Marysville P...
8/2/2014	Requested	Supernatural. Season 1	DVD	Fairfield Co...
7/5/2014	Requested	Criminal minds. The fifth season	DVD	WL Northw...
8/3/2014	Requested	Modern family. Season 1	DVD	CML South ...
6/23/2014	Requested	Ghost adventures. Season 2	DVD	MPL Raym...
7/31/2014	Requested	Who was Leonardo da Vinci?	Book	Pickeringto...
7/15/2014	Requested	The moon	Book	Pickeringto...

Done Stay on Select 28 of 169 record(s) retr ...

What to do about the Blue X

Wait. The other non-blue X items will eventually fill the request.

Make sure that all item records have the same material type when they are cataloged.

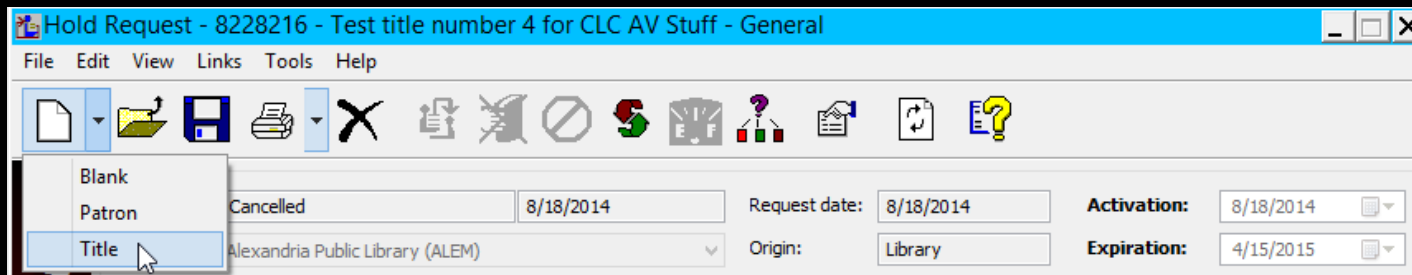
Vote for Enhancement #215856. Polaris should check the patron's material limits each time the RTF process runs instead of just once.

If the patron is below material type limits How to Fix? Cancel, Copy, Delete

Cancel Existing Request



Copy Existing Request



Delete "bad" Request



Satisfied by a bib control

The opposite of actual satisfaction

Presented by: Wes Osborn; OHPUG 2014

A request with no friends (item records)

Hold Request

Request

Status: Requested 4/16/2014 Request date: 4/11/2014

Pickup: CML Reynoldsburg Branch (C-REY) Origin: Library

This item only

Notes

Staff display:

Patron:

Non-public:

PAC display:

Request History

Date	Status	User Name	Branch
4/11/2014 12:11:0...	Requested	dsponseller	
4/12/2014 5:50:58...	Active	PolarisExec	UA Tremont ...
4/16/2014 5:51:34...	Requested	PolarisExec	

Request Satisfied By

Bib Control #

114215

A happy request with friends (items)

Hold Request - 8208448 - The Wednesday sisters - Notes

File Edit View Links Tools Help

Request

Status: Active 8/17/2014 Request date: 8/16/2014 Activation: 8/16/2014

Pickup: CML Hilliard Branch (C-ARD) Origin: Patron Expiration: 5/11/2017

This item only

Notes

Staff display: Patron:

Non-public: PAC display:

Request History

Date	Status	User Name	Branch
8/16/2014 2:47:59...	Requested	OPAC Default	
8/17/2014 5:52:34...	Active	PolarisExec	Alexandria P...

Request Satisfied By

Bib Con...	Item Barcode	Status	Branch	Not...
422786	31870007004400	Out	Grandview Hei...	
422786	30231006252741	In	Marysville Publ...	
422786	32973001073170	In	Alexandria Pu...	
422786	31869003175297	Out	Pickerington P...	
422786	30231001803084	In	MPL Raymond ...	
422786	1315182640	Out	CML Reynolds...	
422786	1301752331	Out	SPL Westland	
422786	1315734663	Out	WL Old Worthi...	

Hold Request

Why aren't there any items?

The binding process hasn't run yet

- Wait 5 minutes

The request is a first available copy request

- Check the Volume field of the request

- Check the associated item records for matching Volume info

The bib record has no associated items

- Staff overrode the no items warning message

- All the item records were deleted

Something else went wrong

Finding requests with no friends (items)

Is hard

Finding requests that are on a bib record where the bib record has no associated items is a start

Use the SQL available on CLC's website

Ill, make it easier, please?

Review

Statistics

Requests

Fulfillment

Troubleshooting

Cats

Questions?

<http://go.clcoho.org/ohpug2014>

wosborn@clcoho.org



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