

# The Polaris Enhancement Process

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KELLIE CONNER, INNOVATIVE

KELLY HOCK, CLC



# Topics

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- Why talk about enhancements?
- Overview of the Polaris enhancement process
- Top voted enhancements in 2013
- Status of the enhancements in process
  
- Enhancements submitted by the CLC in 2013-2014
- Your opinion matters!

# The PUG Enhancement Process

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It all starts with a ticket

Tickets are classified as enhancements

Tickets are added to the common solution

Tickets are nominated for inclusion in the 'The PUG Vote'

Solutions are migrated to the IdeaWall

The common solution is what gets voted on

Top Vote Getters are reported back to Polaris Staff

Polaris analyses and commits to specific requests

Tickets are updated to 'Accepted for Development'

# Alternative Enhancement Routes

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Contractual requirements

Overwhelming customer feedback

Non-PUG member feedback

Internal staff feedback

Industry trends

# The Ticket

Ticket # 240451 Customer CLC Contact Kelly Hock Phone: 614-837-8533 Opened Date 7/30/2014 11:40:45 AM

Site Owner Gabrielle Gosselin Version 4.1 R.2 Build 1036 Source Web  Publish  Post-Upgrade  Enhancement [Secure Link](#)

Description Enhancement: Add Details w/Logic to PAC Max Items Out message Severity 4-Moderate Priority n Classification Application Support, PAC

Department Site Management Assigned Polaris Contact Gabrielle Gosselin Additional Assistance Version Resolved Build Resolved CT CCF  Seed RPU Fields

Response Due Follow Up: Due Date Status Submitted Enhancement! Resolution Summary This Ticket created Solution #5675

Full Description [Chat Page](#) [Journal Overview](#) [Journal Entry Detail](#) [System Log](#) [Combined Log](#) [Running Log](#)

Hi Gabrielle,

We believe that the addition of the same wording w/logic about the patron's material limits that staff see in the client, to the PAC message patrons see, would need to be done by Polaris, so I'm submitting an Enhancement request. Even though the message itself is a custom ILL language string. See below. Thanks!

We had staff at one of our locations inquire about the message displayed when a patron tried to request an item with a material type they cannot request/check out. Here is the inquiry:  
Would it be possible to change the error message juvenile customers with rated "R" restrictions (Restricted 2) receive on the public catalog?

...	Entered By	Entered	Billable	Publish	LongText
▶	Gabrielle.	7/30/2014 11:50 AM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	This is an enhancement.

# Typical Solution

Description: Enhancement: Due date ratio based on material type and holds

Originating Ticket # 100250

Classification:  Allow Comments  Allow Ratings  Featured  
Application Support, Holds(ILL, Holds)  Published

Applicable in the following version (build) and later:  
Version:  Build:

Created By: Jennifer Pollon 1/9/2012 10:27 AM  
Verified By: John Barr Last Update: 8/16/2013 1:01 PM

Statistics: Rating 0.00 (0)/Views 7/Uses 3  Sort Order:

Security: Default

Problem:

Option to be able to change the due date ratio based on material type and holds (i.e. if a DVD has

Linked Tickets

Remove			
Ticket #	Customer	Description	Nominated
89400	Miami-Dade County	SA Parameter for Hold Ratio- to lock in	<input type="checkbox"/>
100250	Duluth	Due date ratio based on material type and holds	<input type="checkbox"/>
105073	Jefferson County Library WA	Hold Ratio	<input checked="" type="checkbox"/>

Record 1 of 3

# Where PUG steps in

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# My Enhancements on the Supportal

Polaris Library Systems Knowledge Base Search

## Enhancement Requests

Please select your top 10 enhancement candidates and then click Submit. Note that deferred enhancements cannot be selected and will not have a checkbox next to them.

	ID	Description	Submitted	Classification
<input type="checkbox"/>	213278	Bulk change Solution titles	08/08/2015 12:08:17 PM	Supportal



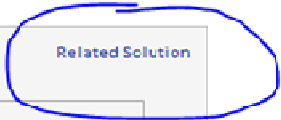
# Related Solution

## Ticket #213278 - Bulk change Solution titles

My Tickets >> Bulk change Solution titles

 Reopen  Refresh  Print

<b>Ticket #</b>	213278		
<b>Description</b>	Bulk change Solution titles		
<b>Customer</b>	Polaris LibrarySystems	<b>Classification</b>	Supportal
<b>Contact</b>	Kellie Conner <input type="button" value="X"/>	<b>Submission Date</b>	8/09/2013
<b>Severity</b>	4 Moderate <input type="button" value="X"/>	<b>Closed</b>	8/16/2013 1:04:27 PM
<b>Status</b>	Submitted Enhancement	<b>Closed By</b>	Jamie Kutzuba
<b>Assigned Polaris Contact</b>	Jamie Kutzuba	<b>Resolution Summary</b>	Custom Data Work
<b>Department</b>	Site Management		
<b>Full Description</b>	<p>Jamie - do you have the ability to do a global replace in sql for all the migrated enhancement solutions?</p> <p>I think it would be a good idea to replace the phrase 'enhancement request' with the word 'Enhancement:'</p> <p>I suggest this because on the supportal, when you look at all the enhancements, they are</p>		



# How Many Customers Have the Same Enhancement Request?

## Enhancement: Bulk change Solution titles



Solutions >> Enhancement: Bulk change Solution titles

### Problem

Jemie - do you have the ability to do a global replace in sql for all the migrated enhancement solutions?

I think it would be a good idea to replace the phrase 'enhancement request' with the word 'Enhancement'

I suggest this because on the supportai, when you look at all the enhancements, they are beautifully sorted in their groups. But there are essentially, two groups. So Enhancement Request: Circ status options would not sort next to Enhancement: Circ Status requirements.

Since the site managers SOP tells them to just put Enhancement: at the front of the descriptions, I think it would be a good idea to make the migrated solutions match.

Thanks for looking into this. If you need help constructing a sql query, please let me know.

### Solution

Done!

My Rating: ☆☆☆☆☆ Average Rating: Not Rated

### Article Information

Resolution:	Supportai
Summary:	
Created By:	Kellie Conner
Created:	9/10/2013 8:50:06 AM
Verified By:	Kellie Conner
Last Updated:	9/10/2013 8:50:30 AM
Statistics:	Rating 0.00 (0) Views 5 / Uses 1



# Finding the IdeaWall

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## Forums

See what other Polaris Library Systems customers are talking about.



## My Forum Topics

View all the forum topics I've submitted in one place.



## My Tickets

Check the status of tickets I've submitted.



## Submit a Ticket

Submit a new ticket.



## Solutions and Enhancements

Find solutions to common issues and problems and browse enhancements.



## FAQs

Get answers to frequently asked questions.



## PolarisTown

Link to the Polaris Extranet.



## PUG Voting

Discuss and vote on PUG Enhancements using the IdeaWall.



## PUG

Learn more about the very active Polaris Users' Group!

### Featured Solutions


- Add carriers for text messages
- Backing up custom SQL jobs
- Can not print receipts on the Polaris Virtual Private Cloud
- MobilePAC link internally
- Polaris SIP service is down
- Which browsers are supported in Polaris 4.1?

# The IdeaWall

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Forums
Acquisitions (34 topics)
Ancillary Products (9 topics)
Cataloging (93 topics)
E-Content (2 topics)
Fusion/Community (4 topics)
PAC (75 topics)
Patron services (251 topics)
Reporting (27 topics)
Serials (7 topics)
System Administration and General Staff Client (39 topics)

# To Comment or Not to Comment

**Patron services** Forum 

This forum is closed for voting and new topics.







**Active (251)** Sort by: [Votes](#) | [Date](#)

**0** votes  
VOTING NOT ALLOWED

**Due date ratio based on material type and holds (#813)**

Option to be able to change the due date ratio based on material type and holds (i.e. if a DVD has holds, change the due date to 1 week, while books with holds have a due date of 2 weeks)

Submitted by **Pug Nomination** on 9/6/2013 4:23 PM







    0  0  0

**0** votes  
VOTING NOT ALLOWED

**Ephemeral Items and Due Dates (#1642)**

Although quick circ items do not really have a due date, we would like for a due date to print on the checkout receipt. The due date that would be used should be the standard loan period set in System Administration. Patrons seem to be confused when ... [MORE>](#)

Submitted by **Pug Nomination** on 9/6/2013 4:23 PM







    0  0  0

**0** votes  
VOTING NOT ALLOWED

**Distinguish freshly renewed items in Items Out list (#1795)**

When a patron calls in and has staff renew items for them - it would be nice if the freshly renewed items had some kind of indicator like different color. OR if you could add checkout/renew date to the list of fields, then staff could sort by that ... [MORE>](#)

Submitted by **Pug Nomination** on 9/6/2013 4:23 PM







    0  0  0

**0** votes  
VOTING NOT ALLOWED

**ExpressCheck - All Items Out Receipt (#4138)**

For ExpressCheck receipts, give the patron the option to print the summary and allow us to customize what prints on the summary, per branch.

Submitted by **Pug Nomination** on 9/6/2013 4:23 PM

    0  0  0

**Views**

**Active (251)**

- Topics | Created (0)
- Topics | Voted On (0)
- Topics | Commented On (0)
- Hidden (0)

**Forums**

- Acquisitions
- Ancillary Products
- Cataloging
- E-Content
- Fusion/Community
- PAC
- Patron services**
- Reporting
- Serials
- System Administration and General Staff Client

# Constructive Comments

**Patron services** Forum

This forum is closed for voting and new topics.

**0** votes  
VOTING NOT ALLOWED

### Due date ratio based on material type and holds (#813)

Option to be able to change the due date ratio based on material type and holds (i.e. if a DVD has holds, change the due date to 1 week, while books with holds have a due date of 2 weeks)

Submitted by **Pug Nomination** on 9/6/2013 4:23 PM

Hidden Comments: [Show](#)

Comments (0)

Vote History (0)

Status History

Add Status

**Forums**

- Acquisitions
- Antillary Products
- Cataloging
- E-Content
- Fusion/Community
- PAC
- Patron services**
- Reporting
- Serials
- System Administration and General Staff Client


# PUG 2013 Top Vote Getters

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Enhancement status is posted as a Notice on the Supportal

Top 25 vote getters from across 10 categories are posted

Status Legend:

- Reviewed – Polaris has reviewed the request to determine scope / feasibility of project
  - Tentative – Accepted for development, schedule not finalized
  - Scheduled – Accepted for development, release schedule determined
  - Done – Development is complete
  - Released – Development has been released to the field
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# Scheduled PUG 2013 Top Vote Getters

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Simply Reports – show and allow editing of saved reports	Scheduled	2015
Widgets for carousels to plug into webpages	Scheduled	Fall
Automatic handling of Display in PAC setting for bib records	Scheduled	Fall
Automatically close a purchase order	Scheduled	Fall
Damaged materials handling	Tentative	2015



# Additional Scheduled Enhancements

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OverDrive Integration	Released	4.1R2
Holds – Deny functions that will trap later	Released	4.1R2
Improvements to Renewal with Optional holds block	Released	4.1R2
What constitutes Patron Activity for patron purge	Released	4.1R2
Limit Floating Items by Collection (with optional load balancing)	Scheduled	Fall
Family holds pickup	Scheduled	Fall
SIP check in item status options	Scheduled	Fall
Missing part check in	Tentative	Fall
Option to require a waive reason	Scheduled	2015
Changing pickup location of item triggering staff notification	Scheduled	2015
New TOM definitions for additional material types	Tentative	2015

# PUG 2014 Enhancement Schedule

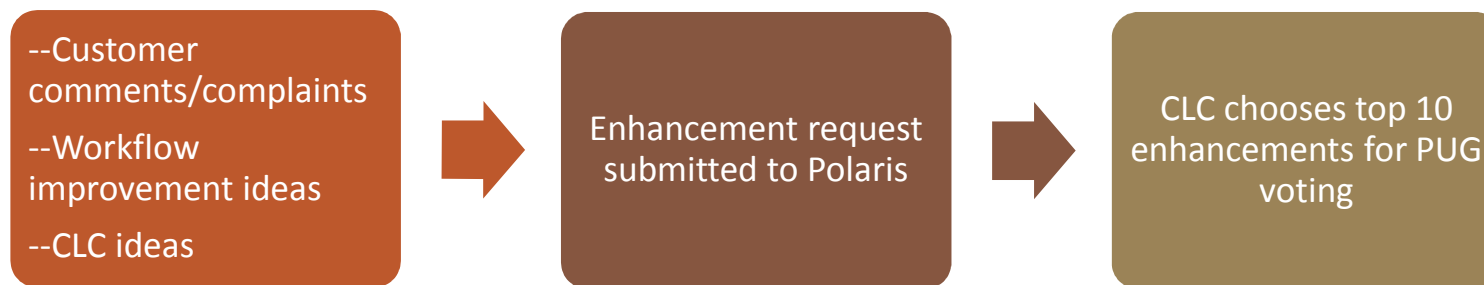
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Archival of 2013:	August 2014
Nominations:	September 2014
IdeaWall Commenting:	October 2014
Voting:	November 2014
Results:	December 2014

# CLC's submitted enhancements 2013-2014

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How do we come up with the list?



We want your input!

# PAC Enhancements

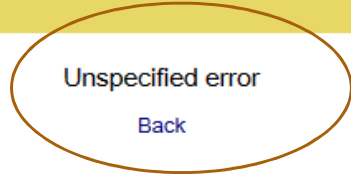
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**#1:** Allow customization of error messages

**Why?** Make the message less confusing for the patron.



**Example:**  
An error has occurred. Please try your search again in a few minutes.



# PAC Enhancements

**#2:** Add “Remember Me” functionality to the PAC

**Why?** Customers won't have to re-enter their card # and pin **every. single. time.** They open a new browser window.

**#3:** Add feature to embed YouTube videos in 856 tag



Gale, *Dorothy* (Fictitious character) -- Juvenile fiction.  
Witches -- Juvenile fiction.  
Oz (Imaginary place) -- Fiction.  
Gale, *Dorothy* (Fictitious character) -- Fiction.  
Witches -- Fiction.  
Fantasy.

Genre: Fantasy fiction.  
Electronic books.

Notes: Description based on print version record.

Web Site: [Web Link Click here to access download Image](#)

ISBN: 9780062280695 (electronic bk.)  
0062280694 (electronic bk.)



**DOROTHY MUST DIE -- Official Book Trailer**

by **harperteen** • 4 months ago • 19,374 views

The official book trailer for DOROTHY MUST DIE, the epic debut by Danielle Paige!

Wow!

Blah ☹️

# PAC Enhancements

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**#4:** Ask Us and patron messages in PAC should be integrated

**Why?** The emails aren't linked to a patron or stored anywhere. This would keep a trail for both the patron and staff.

**#5:** Add more info. To make this message clearer:

*"The request cannot be placed because your account has exceeded the maximum number of requests for this material type. You can cancel some requests for this material type or wait for a request to be filled, then submit this request again."*



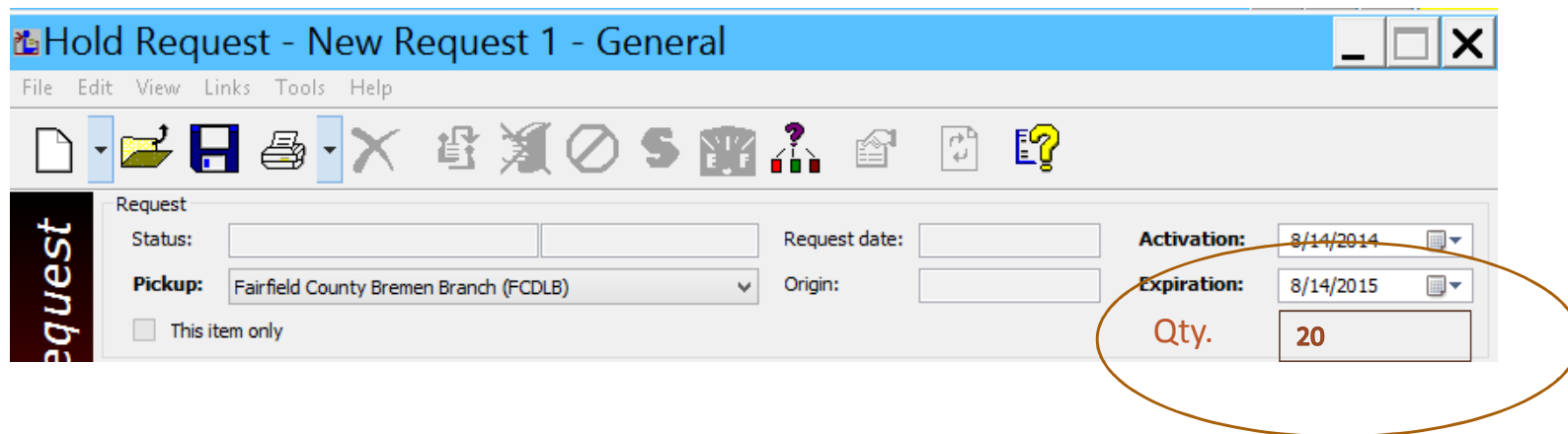
**Why?** It's the same message used when a restricted patron, like a kid who can't check out R movies, tries to reserve an item they can't check out.

"Patron request limit is 0 for material type Video R"

# Holds Enhancements

#6: Let staff specify a quantity of a title to place on hold.

**Why?** Staff won't have to place many holds for the same title



The screenshot shows a web application window titled "Hold Request - New Request 1 - General". The window has a menu bar with "File", "Edit", "View", "Links", "Tools", and "Help". Below the menu bar is a toolbar with various icons. The main content area is a form with the following fields:

<b>Request</b>	Status:	<input type="text"/>	Request date:	<input type="text"/>	<b>Activation:</b>	8/14/2014
	<b>Pickup:</b>	Fairfield County Bremen Branch (FCDLB)	Origin:	<input type="text"/>	<b>Expiration:</b>	8/14/2015
	<input type="checkbox"/>	This item only				
					<b>Qty.</b>	20

The "Qty." field, containing the value "20", is circled in orange.

# Holds Enhancements

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**#7:** Have Polaris check to see if items can actually fill a hold request

**Why?** There is a setting that would let patrons renew an item if there are holds, as long as other copies are still available to fulfill those other holds. But...



Renewal: Block if there are holds

No

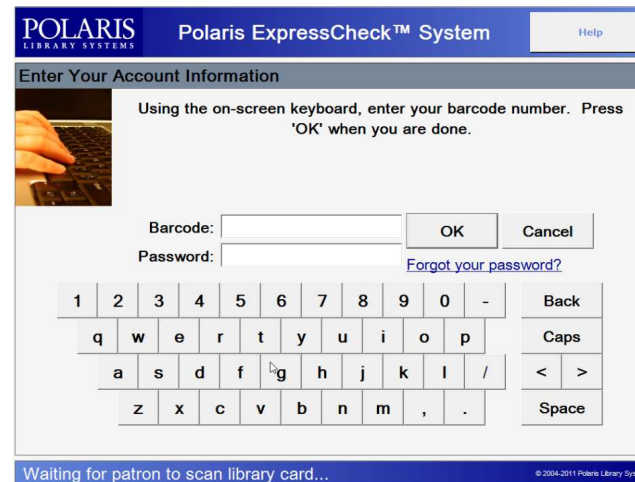
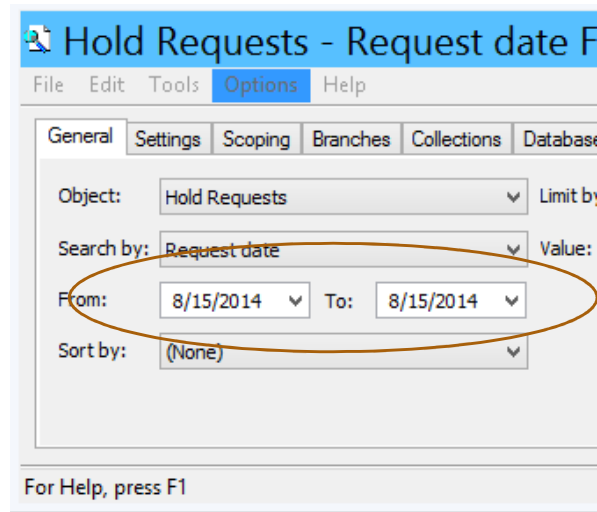
**#8:** If a customer has a hold and then checks out another item with the same bib record, don't cancel the existing hold.

**Why?** Some libraries offer popular titles for short loan periods with holds or renewals. Patrons place holds so they can finish the book at a later time.



# Circulation Enhancements

**#9:** Add ability to search for transactions by a time range



**#10:** Option for numeric-only keypad on ExpressCheck

# Circulation Enhancements

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**#11:** Allow a hold request to fill once a patron goes below their holds limit

Why?

Request Satisfied By				
Bib Con...	Item Barcode	Status	Branch	Not Supplied .
398363	302310081...	Out	Marysville Pu...	
<input checked="" type="checkbox"/> 398363	318700079...	Held	Grandview H...	Not Holdable
<input checked="" type="checkbox"/> 398363	318680156...	Transferred	Fairfield Cou...	Not Holdable

## Blue X of Death



**#12:** Ability to key in card # in ExpressCheck while in Offline mode

Why? In offline mode, customers have to have their card in hand to check out.

# Circulation Enhancements

**#13:** Provide more direct method of setting items to Missing without having to check in first

**Why?** Items often aren't in hand, or have holds that must be resolved

**#14:** Include workstation name in lock message screen

**Why?** The lock is at a workstation, so if the person walks away, you still know which session to restart.

Also, for CLC staff:

Object Type	Object ID	Staff Member	Workstation	Lock Date
Patron Status	311717	aheffernan	circ01	8/15/2014 10:02:40 ...
Bibliographic Rec...	1012119	aslane	OS-TECHSRV-07	8/15/2014 12:14:10 ...
Hold Request	8194292	bdavis	lane06	8/15/2014 10:59:08 ...
Patron Status	1285767	bdavis	lane06	8/15/2014 10:59:31 ...
Item Record	5783073	bdewitt	adult04	8/15/2014 9:35:38 AM
Item Record	3434648	bjohnson	SWPLGC40	8/15/2014 12:07:09 ...
Patron	840661	bwidmayer	GAHSM91KV8F1	8/15/2014 12:14:50 ...
Patron Status	627510	bwidmayer	GAHSMMD5Y47L1	8/15/2014 12:09:20 ...
Patron Status	840661	bwidmayer	GAHSM91KV8F1	8/15/2014 12:13:28 ...
Invoice	45445	cbockrath	TSLINDFKXTG1	8/15/2014 11:53:34 ...
Item Record	2098850	ckaderly	OS-CIRC-03	8/15/2014 12:19:25 ...
Patron Status	428925	ckaderly	OS-CIRC-03	8/15/2014 12:19:28 ...
Patron Status	1264242	cpolack	adult05	8/15/2014 12:09:09 ...

# Cataloging Enhancements

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**#15:** Increase the number of records you can export with ExportExpress (used to export MARC records for Boopsie and other 3<sup>rd</sup> party vendors)

**Why?** Current limit is 999,999; exporting more than that is difficult and time-consuming

**#16:** Include Title of de-duped incoming record in Import Report

**Why?** Difficult to identify the de-duped records because you don't see the title of the duplicates, only the kept title.



- Import option to reject forced the incoming record to be ignored.
- Import option to reject forced the incoming record to be ignored.
- Duplicate Reason Title



- 1404454 UPC The Cowboy Takes a Wife
- 1404454 UPC The Widow's Suitor

# Cataloging Enhancements

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**#17:** Pre-populate info. into the find tool of Check Headings Assistant in cataloging when saving a bib with unlinked authorities

**Why?** The process is extremely time-consuming and re-typing promotes errors.

**#18:** Add receive date to 970 field so they can be cleaned up automatically.

**Why?** We want the 970 field cleaned up when the item is received, not when the PO is processed.

# Other Enhancements

**#19:** Provide ability to set "From" Field in email notices

**Why?** We are able to set the "from" address, but not the name associated with the email, for notices. This makes it harder for patrons to know at a glance that the email is from the library.

E-mail notice

From:










Reply-to:

E-mail address to use:

Send report for e-mail notice processing

**#20:** Add a hierarchy to organize collection codes.

**Why?** Simplify reporting for those (BOT, Directors, etc) who don't need granular details.

 Children's Nonfiction	 Juvenile Nonfiction
 Children's Nonfiction Audio Book	 Juvenile Nonfiction DVD
 Children's Nonfiction DVD	 Juvenile Nonfiction Easy
 Children's Nonfiction Foreign Language	 Juvenile Nonfiction Foreign Language
 Children's Nonfiction Reader	

# Questions? Thoughts? Thank You!

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Kellie Conner



Kelly Hock

ILS Support Analyst

Central Library Consortium

khock@clcoho.org

