Meet them where they are

Making circulation limits easy to understand and modify for Patron Services Staff

Streamlining Circ Setting Updates

Why?

- Existing requests were often incomplete or ambiguous
- Changes are labor intensive in Polaris SA
- Updating with manual SQL scripts can be difficult or error prone if users are not clear and concise in their requests

Pros

- Standardizes request format
- Eliminates ambiguity
- Much faster and easier to process once submitted
- Excel files can serve as a basic history of changes

Cons

- Potentially more labor intensive for library staff
  - Somewhat alleviated by experience with Excel
- Works best if the end users are comfortable in Excel
- Requires access to the Polaris SQL database, including the ability to run 'UPDATE' commands

Process Overview

- Library staff runs the report for the type of setting they want to update and downloads it as an Excel spreadsheet
- Library staff makes modifications to the Excel spreadsheet to update any desired settings
- Library staff opens a ticket saying they'd like their settings updated and attach their spreadsheet
- IT/Consortium staff adds the formula to the spreadsheet to transform the spreadsheet rows into 'INSERT' statements
- The formula column is copied out of the spreadsheet and into the SQL script
- The SQL script is executed, which updates the settings

Resources

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The reports and supporting SQL files can be downloaded here:

https://go.clcohio.org/iug2022circsettingupdates