

Branching Out:

Using branches in Polaris for more than buildings

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IUG, 5/7/19

The CLC

17 member libraries
57 physical buildings
137 branches

....4.5 FTE



In this presentation

How the CLC uses branches

Building a toolbox for creating new
branches

In-Depth look at CLC's branch setup steps

What is a branch in Polaris?

A service point for staff or patrons that is unique from the statistics, physical location, permissions or settings from all others at the library

The Library/Branch Hierarchy

Library: The parent

- Overarching rules that apply to all children

Branch: The children

- Belong to one library, but they define their own circ rules, notice wording, etc.

Consortium Circulation Rules

CLC uses the checkout branch to determine circulation rules

Some of our branches wouldn't be possible without it (ex: pickup lockers – extended loan period)

How does the CLC use branches?

A separate pickup location

- Don't own items
- Patrons can choose the pickup location
- OR can be only visible to staff

How does the CLC use branches?

A separate pickup location

- 24-Hour pickup lockers
- Drive-Up Windows
- Schools



How does the CLC use branches?

A service that owns items

- Collections curated by library staff
- Not permanently owned
- Browsing only
- Checkouts happen

How does the CLC use branches?

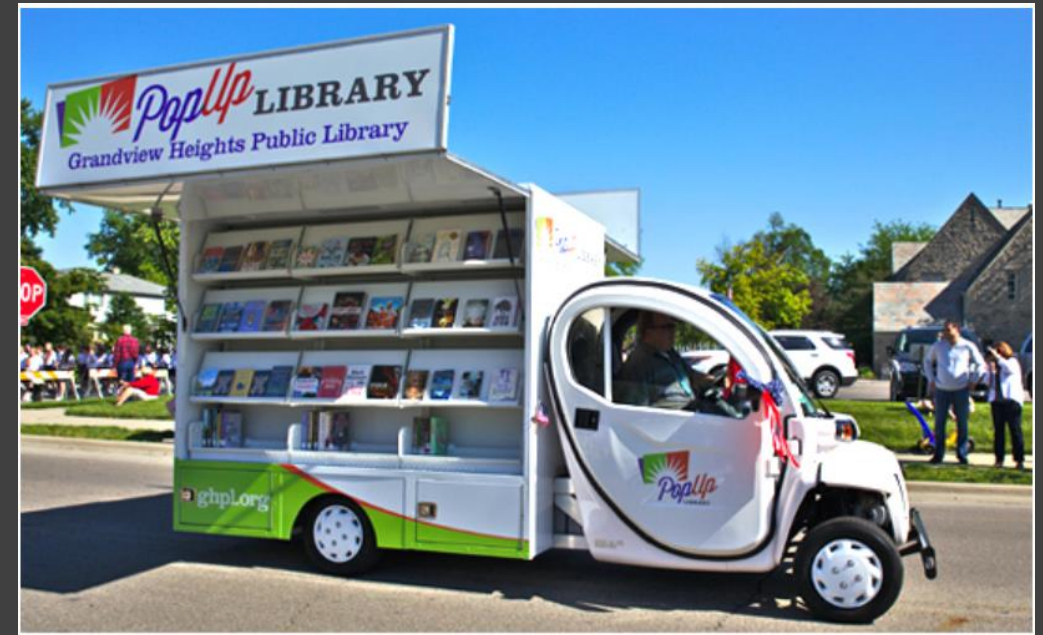
A service that owns items

School Delivery

Library Kiosks

Mobile Book Displays

Vending Machines



How does the CLC use branches?

A place to send items

Repair/withdraw

Overflow Floating



How does the CLC use branches?

A way to keep separate statistics for transactions, reporting

Ready to Read
Library Tablets



How does the CLC use branches?

A way to control Permissions

Limiting modification to certain bib records
(Overdrive) – CLC's branch

A way to test in Production

Assign fake items, patrons, doesn't affect stats &
reports (notices) – CLC's branch

Adding Workstations vs. Branches

- Workstations can give you separate statistics for transactions
 - Good for separating Leap vs. Client
- Requires an additional Polaris license
- Few canned reports break down by workstation

Adding the branches

- Evolved from muddling through a few times a year
- To muddling through on a monthly basis
 - Apologizing for the same issues every time
 - Embarrassing!
- To creating an organized workflow
 - Minimal issues, faster, can handle several at one time

The Bad Old Days

- Just added stuff to a word document as it came up
 - The bigger the font, the more important...?
- Missing steps for requesting branch from III
- Missing steps for suppressing branch before go-live
- Branch setup form incomplete

MAKE SURE THAT NEW BRANCH ABBREVIATION AND ADDRESS ARE SENT TO CML TRANSPORTATION AND MARIA AND SUSAN (for suppressing in Bibliocommons)

For any new branches set up, go to Resource Groups and check the branch as being part of the library's resource group. It's not checked by default.

Send the SIP Port # to Paul to add firewall rules to them

Ask Paul to provide a SIP password for the new branch. Let the library know and ask if they want to change it.

Ask Mike to suppress the branches from his patron registration form until the branch opens.

When adding a branch there are some tasks that are easier to do through the client than through SQL. Use the following checklist as a guide:

Make sure the Return Address is filled in. III has been leaving it blank when creating new branches.

Easier to add through the client:

Add new branch to the resource group for that library (check the branch)

Create Address (Policy Tables – Addresses)

Check to make sure the return address is correct

Add branch to Preferred Patron group for that library (if applicable)

When you set up over two dozen
branches in a year...

You don't want to reinvent the
wheel.

How to minimize the pain?



When you set up over two dozen
branches in a year...

How to minimize the pain
BESIDES babies and cats?

Assemble a Toolbox

- Ill sets up branch
- Branch Worksheet for Requester to complete
- Custom Reports for quick custom setting updates
- Give yourself enough time
- A comprehensive checklist



Ask Ill to set up the branch for you

The best \$500 you'll ever spend

They've got the scripts

They set up permissions

Quick turnaround

BUT There will still be work to do



Ask ILL to set up the branch for you

Two Options:

- Customer Support can copy a branch with existing settings (some customization OK)
- Data Services can set up a branch with an entirely new profile



1. Provide a form for the requester

All the info ILL needs to set up the branch – Minimizes back-and-forth that costs time

Good starting point for information gathering and other setup conversations

New Branch Worksheet - Should be filled out by the member library. If the settings should be copied from another existing branch, the answer section should include that branch's name.

Branch Name:	Millersport 24 Hour Library Kiosk
Date of Branch Opening:	October 1, 2018
Branch Abbreviation <i>(limit 5 characters):</i>	FCDMP
Branch Street Address:	2201 Refugee Road
Branch Zip:	43046
Branch Contact Person:	Samantha Betts
Branch Contact Phone:	740-653-2745, ext #121
Parent Library:	Fairfield County District Library
Branch Website:	www.fcdlibrary.org
Standard Loan Period:	Same as FCDL Main
# Free Days:	0
Days Closed: Sundays:	no
Days Closed: Holidays:	no
Hours of Operation (days, times):	24/7 operation
Does collection Float?	no
Staff members assigned to the branch (default login branch):	none
Should the permissions match an existing location? If so, which?	Yes, FCDL Main
Should Shelf Locations match an existing location? If so, which?	FCDL Main
Should Collection Codes match an existing location? If so, which?	FCDL Main
Should items assigned to	Yes



1. Provide a form for the requester

- Go-Live date
- Branch name and abbreviation
- Staff members
- Contact Information
 - Use generic email & job title



1. Provide a form for the requester

Whether the branch will:

- own items
- be a pickup location
- fill holds
- float items
- receive/lend for Inn-Reach
- Have custom notice wording



1. Provide a form for the requester

What settings can be copied from an existing branch:

- Dates Closed
- Permissions
- Collection codes
- Shelf Locations
- Hours of operation
- Circulation Settings



2. Custom Reports for Unique Circ Settings

Any deviations
from the copied
branch

SQL script to add
changes quickly

branches materialtypes
patroncodes

1 of 1 100%

Material Loan Limit Updates

Organization ID	Branch	Patron Code ID	Patron Code	Material Type ID	Material Type	Max Items	Max Request Items
3	Alexandria Public Library	17	Branch Use Card	1	Audio Book	10	25
3	Alexandria Public Library	18	Business/Community Card	1	Audio Book	10	25
3	Alexandria Public Library	1	Full Access	1	Audio Book	10	25
3	Alexandria Public Library	19	Homebound by Mail	1	Audio Book	10	25
3	Alexandria Public Library	3	ILL	1	Audio Book	10	25



3. Set a reasonable schedule

At least 3 weeks

Get quote from III and create PO

Get form from requester

Announce and notify impacted staff

Time to quality check the settings



4. Create a comprehensive checklist

Useable for all types of branches – check off what you did, AND what you didn't need to do

Accessible by other staff – sharing is caring

Break it down by the timeline of setup

Continually update – there's always something new



CLC's Checklist

Includes all steps

- From ticket creation to go-live

Is a Constant Work in Progress

Uses Discourse

- All staff can access and edit
- Has actual checkboxes
- Can assign tasks to staff
- Include docs and links



Google Docs - another good option

- Share with anyone via a link
- Saves edits in real-time
- Can see revision history
- If you can live without an actual check box
 - Use Google Sheets – Can filter by column (add an x for done)



CLC's Checklist



Preliminary steps

- Library has opened a HelpDesk ticket to request branch
- Library has completed the [CLC new branch worksheet](#) ¹
- New SIP port has been added (instructions for adding port [here](#) ¹)
- Copy CML Transportation Manager and CML IT Sys Analyst Manager on HelpDesk ticket
 - Ask transportation mgr. to confirm that the branch abbreviation works for them
 - Once the new abbreviation codes have been decided alert CML IT so they can suppress the branch in Biblicommons if needed. (LET CML KNOW 2 DAYS BEFORE BRANCH IS CREATED to allow time for BC to suppress the branch)
 - Let them know the go-live date and confirm transportation/Biblicommons/I-Tiva can be ready by then
 - If it's a new CML branch, find out which Primary RTF queue order it should use (there are 3)
 - If it's not a CML branch, find out which route they'll be on for the primary RTF queue, OR if it can be copied from the Main branch for that library.
 - Current Transportation Manager is Matt Hudak and IT Sys Analyst Manager is Maria Armitage. Use <https://people.clcoho.org> to look up names if staff has changed
- Finance items complete
 - PO for new branch opened (ask Kalee to request)
 - Request signed quote from Ill rep (Dennis Carter) via email
 - Quote forwarded to Wes and Signed
- Inn Reach Setup complete

Part 1 – Preliminary Steps

Request a quote

Gather details of branch (requester fills out form)

Open a ticket with III

Notify impacted staff/vendors



Part 1 – Preliminary Steps

Open a ticket with III:

Signed quote

Filled-out Setup Form

3M SIP Port # (if branch is using)

Updated Inn-Reach Profiling document

Specific creation date (3rd party vendors involved)



Part 1 – Preliminary Steps

Notify impacted staff/vendors:

- IT department – new 3M SIP port, updates to website
- Transportation – new pickup location, update routes
- Finance – Create PO, budget, pay
- Inn-Reach – ticket to Ill to add branch
- 3rd party vendors (Bibliocommons, etc.)



Part 2 – Setup after branch created

- Add/update workstations
- Manually change settings that couldn't be copied
- Add Overdrive resource group for new branch
- Update notice wording



Part 2 – Setup after branch created

- Suppress as a pickup location until go-live date
- Suppress from branch switching until go-live date
- Turn off RTF processing until go-live date
- Add items and item templates



Part 3 – Testing

- Areas of Polaris that have been issues when adding a branch in the past
- You can ask Ill to fix these as part of the branch creating cost



Part 3 – Testing

Simply reports – make sure new branch appears in filters. Contact III if it's missing.

Item general filters

Item record set

Assigned branch:

Library quick pick

Branch

Collection

Adult Basic Learning
African American

Not present

Alexandria
Bexley
Central Library Consortium Electronic Library
Columbus Metropolitan Library

WL Worthington Park After Hours Pickup Locker
WL Worthington Schools
zzzdonotuse CML Local History and Genealogy
zzzdonotuseCML Weinland Branch



Part 3 – Testing

Review the branch in SA

Compare copied settings from template branch



How I do it

Administration Explorer - System - Central Library Consortium - Polaris

File Edit Help

Administration Explorer - System

Shelf Locations

Organization	Description
CML Driving Park Branch	Atlas Stand
CML Driving Park Branch	Homework Help Center
CML Driving Park Branch	Local History
CML Driving Park Branch	NEW BOOK AREA
CML Driving Park Branch	Wedding Music
CML Driving Park Branch	Christmas Music
CML Driving Park Branch	BUSINESS
CML Driving Park Branch	Business
CML Driving Park Branch	Oversize
CML Driving Park Branch	Consumer File

For Help, press F1 10 row(s)

Administration Explorer - System - Central Library Consortium - Polaris

File Edit Help

Administration Explorer - System

Shelf Locations

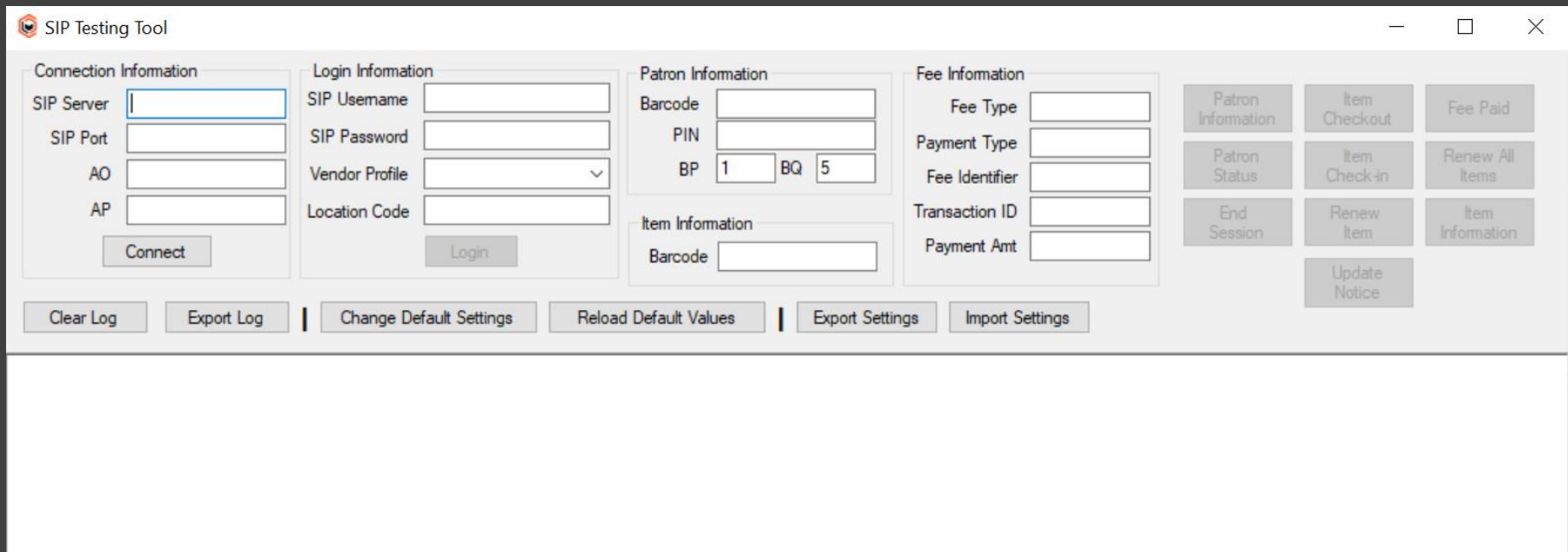
Organization	Description
CML Dublin Branch	Atlas Stand
CML Dublin Branch	Display - Dublin
CML Dublin Branch	Homework Help Center
CML Dublin Branch	Local History
CML Dublin Branch	NEW BOOK AREA
CML Dublin Branch	Wedding Music
CML Dublin Branch	Christmas Music
CML Dublin Branch	Oversize
CML Dublin Branch	Business
CML Dublin Branch	Oversize
CML Dublin Branch	Consumer File

For Help, press F1 11 row(s)



Part 3 – Testing

- Make sure SIP service responding to new ports



The screenshot displays the 'SIP Testing Tool' interface, which is organized into several sections for configuring and testing SIP services:





- Connection Information:** Includes fields for SIP Server, SIP Port, AO, and AP, with a 'Connect' button below.
- Login Information:** Includes fields for SIP Username, SIP Password, Vendor Profile (a dropdown menu), and Location Code, with a 'Login' button below.
- Patron Information:** Includes fields for Barcode, PIN, BP (with a value of 1), and BQ (with a value of 5).
- Item Information:** Includes a field for Barcode.
- Fee Information:** Includes fields for Fee Type, Payment Type, Fee Identifier, Transaction ID, and Payment Amt.
- Utility Buttons:** A row of buttons at the bottom includes 'Clear Log', 'Export Log', 'Change Default Settings', 'Reload Default Values', 'Export Settings', and 'Import Settings'.
- Action Buttons:** A grid of buttons on the right side includes 'Patron Information', 'Item Checkout', 'Fee Paid', 'Patron Status', 'Item Check-in', 'Renew All Items', 'End Session', 'Renew Item', 'Item Information', and 'Update Notice'.



Part 3 – Testing – SA Settings

Item Create Call Number Hierarchies
(Database Tables -> Item Create Call Number Hierarchies)

Make sure it's not blank

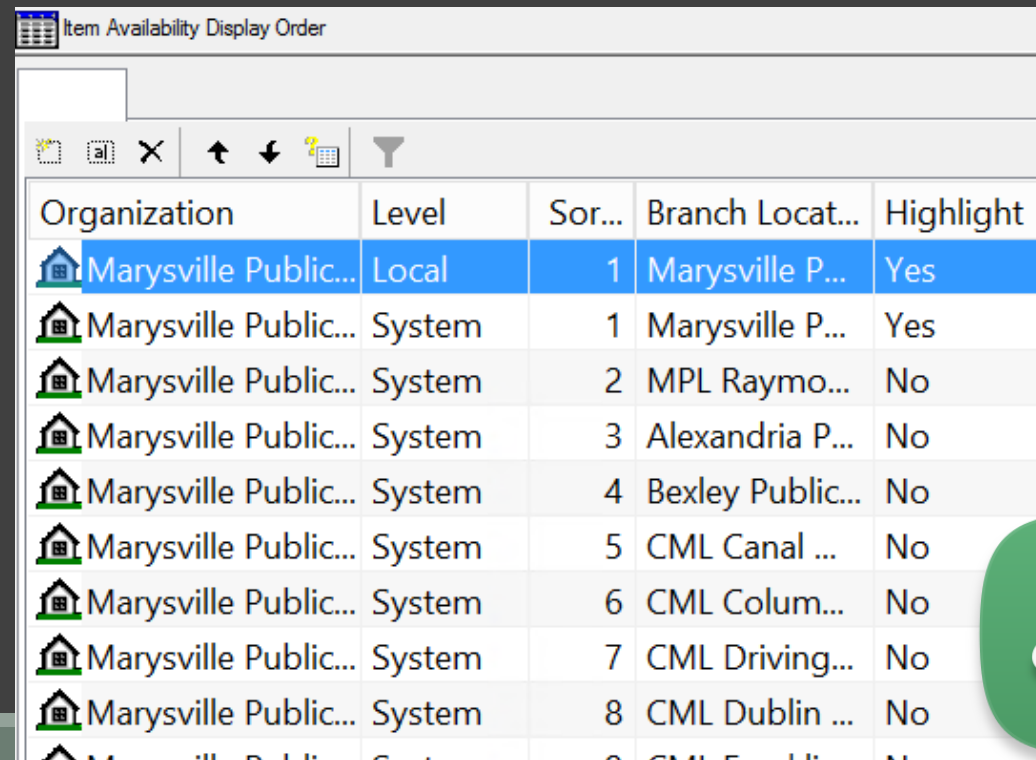
Organization	Precedence	Scheme	Tag	Prefix	Classification	Cutt...	Su...	V...	C...
 Marysville Publ...	1	Dewey Decimal	82		a	b			
 Marysville Publ...	2	Dewey Decimal	92		a	b			
 Marysville Publ...	3	Dewey Decimal	99		a	b			
 Marysville Publ...	4	Dewey Decimal	98		a	b			













Part 3 – Testing – SA Settings

Verify PAC item availability display
(Policy Tables -> Item Availability Display Order)

Make sure it's
not blank



Organization	Level	Sor...	Branch Locat...	Highlight
 Marysville Public...	Local	1	Marysville P...	Yes
 Marysville Public...	System	1	Marysville P...	Yes
 Marysville Public...	System	2	MPL Raymo...	No
 Marysville Public...	System	3	Alexandria P...	No
 Marysville Public...	System	4	Bexley Public...	No
 Marysville Public...	System	5	CML Canal ...	No
 Marysville Public...	System	6	CML Colum...	No
 Marysville Public...	System	7	CML Driving...	No
 Marysville Public...	System	8	CML Dublin ...	No
 Marysville Public...	System	9	CML E...	No



Part 3 – Testing – SA Settings

- ✓ Add branch to Prefer My Patron group for that library system
(System -> Parameters -> Request -> Holds options -> Queue -> Edit appropriate group)

Trapping Preference

None

Prefer my location
 in Preference Group

Prefer my patron
 in Preference Group

Prefer check-in location

Maintain Queue Position

If suspended/inactive

If re-activated

Preference Group

Group 4

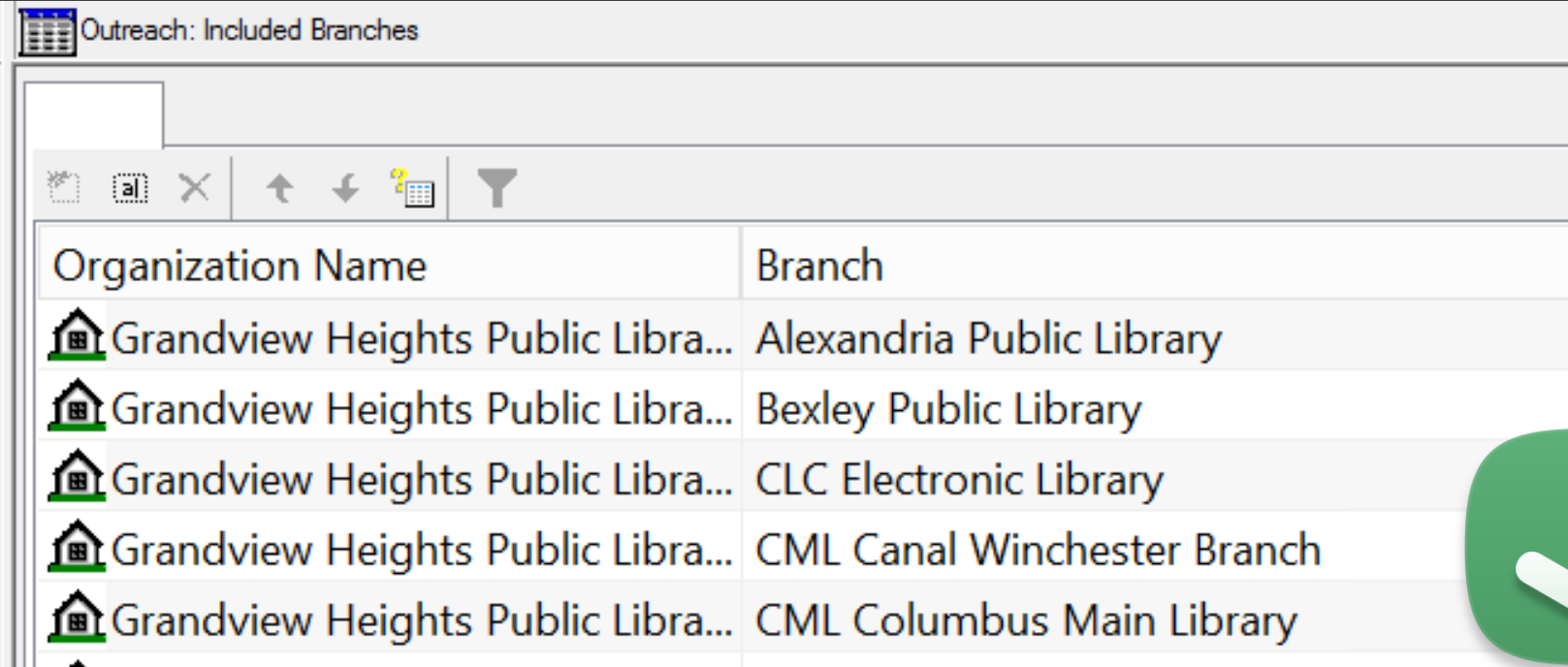
Group 4 has 39 members.






- + Central Library Consortium Electronic Library
- Columbus Metropolitan Library
 - CML Canal Winchester Branch [Patron] [Grp: 4]
 - CML Columbus Main Library [Patron] [Grp: 4]
 - CML Driving Park Branch [Patron] [Grp: 4]
 - CML Dublin Branch [Patron] [Grp: 4]
 - CML Franklinton Branch [Patron] [Grp: 4]
 - CML Gahanna Branch [Patron] [Grp: 4]
 - CML Hilliard Branch [Patron] [Grp: 4]
 - CML Hilltop Branch [Patron] [Grp: 4]
 - CML ILL [Patron] [Grp: 4]
 - CML Karl Road Branch [Patron] [Grp: 4]
 - CML Linden Branch [Patron] [Grp: 4]



Part 3 – Testing – SA Settings

Add to Outreach Included Branches table for all libraries (Policy Tables → Outreach Included Branches)



Organization Name	Branch
 Grandview Heights Public Libra...	Alexandria Public Library
 Grandview Heights Public Libra...	Bexley Public Library
 Grandview Heights Public Libra...	CLC Electronic Library
 Grandview Heights Public Libra...	CML Canal Winchester Branch
 Grandview Heights Public Libra...	CML Columbus Main Library

Part 3 – Testing – SA Settings

- Verify RTF Table for branch is populated (If branch will allow holds pickup)
 - (policy tables → Holds Routing Sequence Primary & Secondary)
- Verify Branch appears in other libraries' RTF tables (if branch will allow items to fill holds)



Part 3 – Testing - Permissions

- Make sure branch is added to permission groups
- Wherever other branches for that library are located

Permission Group - MPL Patron Services Level 2 Access - Permissions

File Edit View Tools Help

Identification

Group name: MPL Patron Services Level 2 Access

Description: Marysville Patron Services General Level 2 Access Patron Services Module General Circ Staff (Mid Level)


Permissions

Control Record	Permission	Subsystem	Organization	Organization Type
Override request limits	Allow	Circulation	Bexley Public Library	Branch
Patron record sets	Access	Circulation	CLC Electronic Library	Branch
Patron record sets	Create	Circulation	CML Canal Winchester Bra...	Branch
Patron record sets	Delete	Circulation	CML Columbus Main Library	Branch
Patron record sets	Modify	Circulation	CML Driving Park Branch	Branch
Patron registration	Access	Circulation	CML Dublin Branch	Branch
Patron registration	Create	Circulation	CML Franklinton Branch	Branch
Patron registration	Create e...	Circulation	CML Gahanna Branch	Branch
Patron registration	Modify	Circulation	CML Hilliard Branch	Branch
Patron status	Access	Circulation	CML Hilltop Branch	Branch
Patron status	Access n...	Circulation	CML ILL	Branch
Patron status	Access p...	Circulation	CML Karl Road Branch	Branch
Patron status	Access p...	Circulation	CML Linden Branch	Branch
Patron status	Create/d...	Circulation	CML Livingston Branch	Branch
Patron status	Display ...	Circulation	CML Marion-Franklin Branch	Branch
Patron status	Display ...	Circulation	CML Martin Luther King B...	Branch
Patron status	Display ...	Circulation	CML New Albany Branch	Branch



Part 3 – Testing - PAC

- Verify that the branch is showing up in PAC switching
- items are visible
- Branch is listed in Item Availability Display

 FILTER

Availability

Available Now (427)

Location

Worthington Libraries

WL Old Worthington 📍 (122)

WL Northwest (124)

WL Worthington Park (48)

Other libraries

Fairfield County Main Library (143)

UA Tremont Road (131)

Marysville Public Library (129)

[more>>](#)



Part 4 – Go-Live

Enable as a pickup location

- If patrons registered ONLY at certain branches within a library system should see the pickup location:
 - Enable pickup location ONLY for that branch
 - Pickup branches determined by the patron's registered branch



Part 4 – Go-Live

Enable as a pickup location

If the pickup location should be visible only to that library's staff...

Pickup branches to exclude in PAC when creating requests:

- Alexandria Public Library
- Bexley Public Library
- CLC Electronic Library
- CML Canal Winchester Branch
- 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



Part 4 – Go-Live

Enable as a pickup location

- UNcheck the “exclude selected branches in staff client” box in SA
- Remove holds permissions as needed

Pickup branches to exclude in PAC when creating requests:

<input checked="" type="checkbox"/>	Alexandria Public Library
<input type="checkbox"/>	Bexley Public Library
<input checked="" type="checkbox"/>	CLC Electronic Library
<input type="checkbox"/>	CML Canal Winchester Branch
<input type="checkbox"/>	CML Columbus Main Library
<input type="checkbox"/>	CML Driving Park Branch
<input type="checkbox"/>	CML Dublin Branch
<input type="checkbox"/>	CML Franklinton Branch
<input type="checkbox"/>	CML Gahanna Branch
<input type="checkbox"/>	CML Hilliard Branch
<input type="checkbox"/>	CML Hilltop Branch
<input checked="" type="checkbox"/>	CML ILL
<input type="checkbox"/>	CML Karl Road Branch

Exclude selected branches in staff client



Part 4 – Go-Live

Turn on RTF processing

Hold options [CML Dublin Branch (br)]

Requests Charges Preferred Pickup Staff client & PAC Terms RTF Queue

Stop RTF processing

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

Time out Located status

48 hour(s)

Total days in Primary RTF Cycle: 60

Total days in Secondary RTF Cycle: 365

Default not-supplied reason (System level only):

If all material limits exceeded, set to Not Supplied

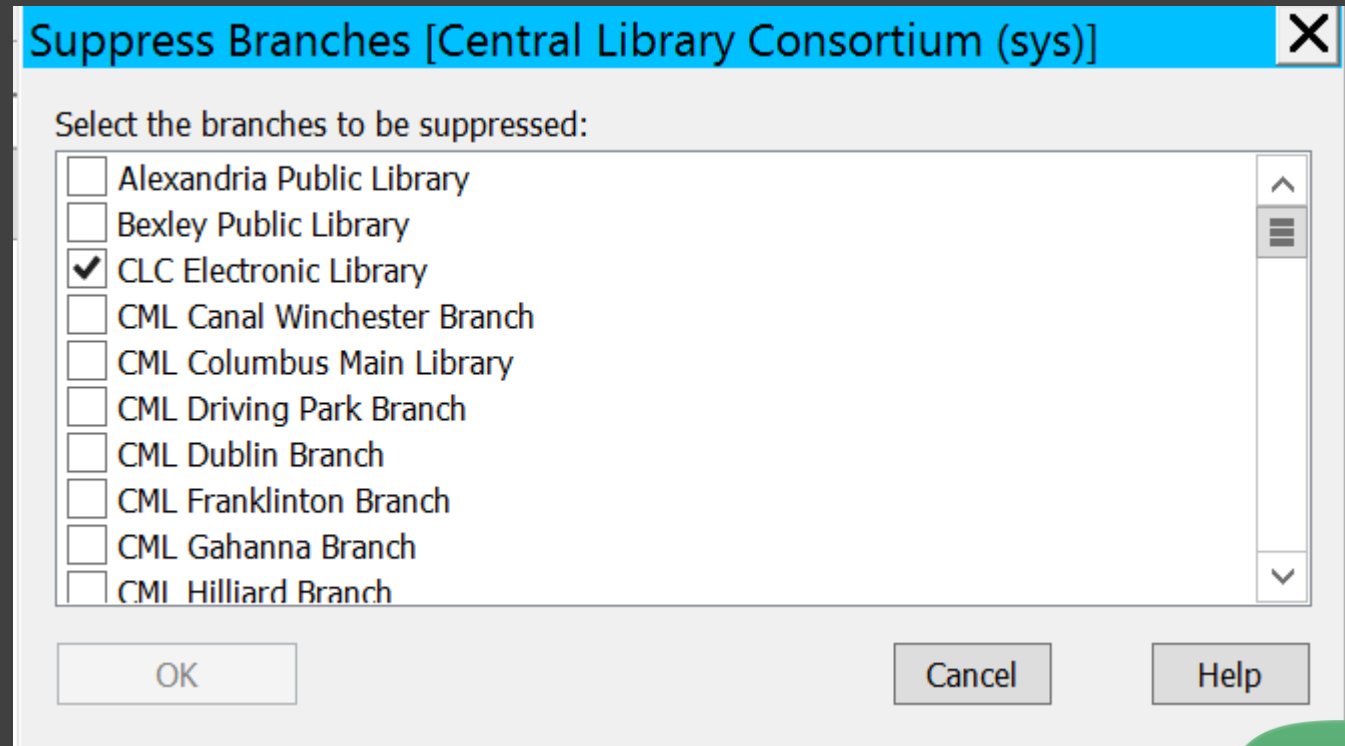
OK Cancel Apply



Part 4 – Go-Live

Un-Suppress Branch

Turn on branch
switching in PAC



Part 4 – Go-Live

Announce to
staff that
branch is live



A word on reusing old branches

- Deleting an unused branch is a bad idea
 - CLC suppresses the branch and renames it
- Have to manually update SA settings, permissions and notice wording
- Might be weird settings you could miss
- Historic statistics could be a problem

Thank you!

Questions? khock@clcohoio.org

Links:

- This presentation:
<https://clcohoio.org/2019/05/06/kellys-2019-iug-presentation/>
- [CLC's Checklist](#)
- [CLC's Branch Setup Worksheet](#)
- [CLC's SIP Testing Tool](#)