Controlling Circulation

Understanding patron material limits
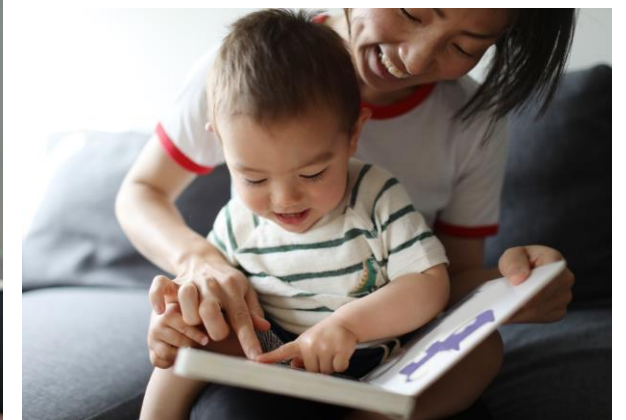
Elizabeth Biggs, Polaris Site Manager

Agenda

- What are patron material limits?
- Settings in Polaris
  - Patron/Material Type Loan Limit Blocks table
  - Material Type Groups
  - Consortium Circulation
- Helpful resources

What are patron material limits?

- Loan limits
- Request limits
- Total overall vs. specific material type limits

Patron/Material Type Loan Limit Blocks policy table

- Initial view

Patron/Material Type Loan Limit Blocks policy table

- Select a patron code in the top section of the table.
- Material type limits will display in the bottom section.

Patron / Material Type Loan Limit Blocks

Organization	Patron Code	1st Level Fine	2nd Level Fine	Total Item Limit	Total Overdue	Total Holds
East Branch	Adult (18 and over)	$0.10	$5.00	50	10	50
East Branch	Juvenile Full Service	$0.10	$5.00	50	10	50
East Branch	Juvenile With Restrictions	$0.10	$5.00	50	10	50
East Branch	Staff	$5.00	$75.00	500	25	100
East Branch	Teacher	$0.10	$50.00	100	10	100
East Branch	Volunteer	$0.10	$5.00	100	10	100
East Branch	Internet Only	$0.00	$0.00	0	0	0
East Branch	Outreach	$0.10	$50.00	100	25	100

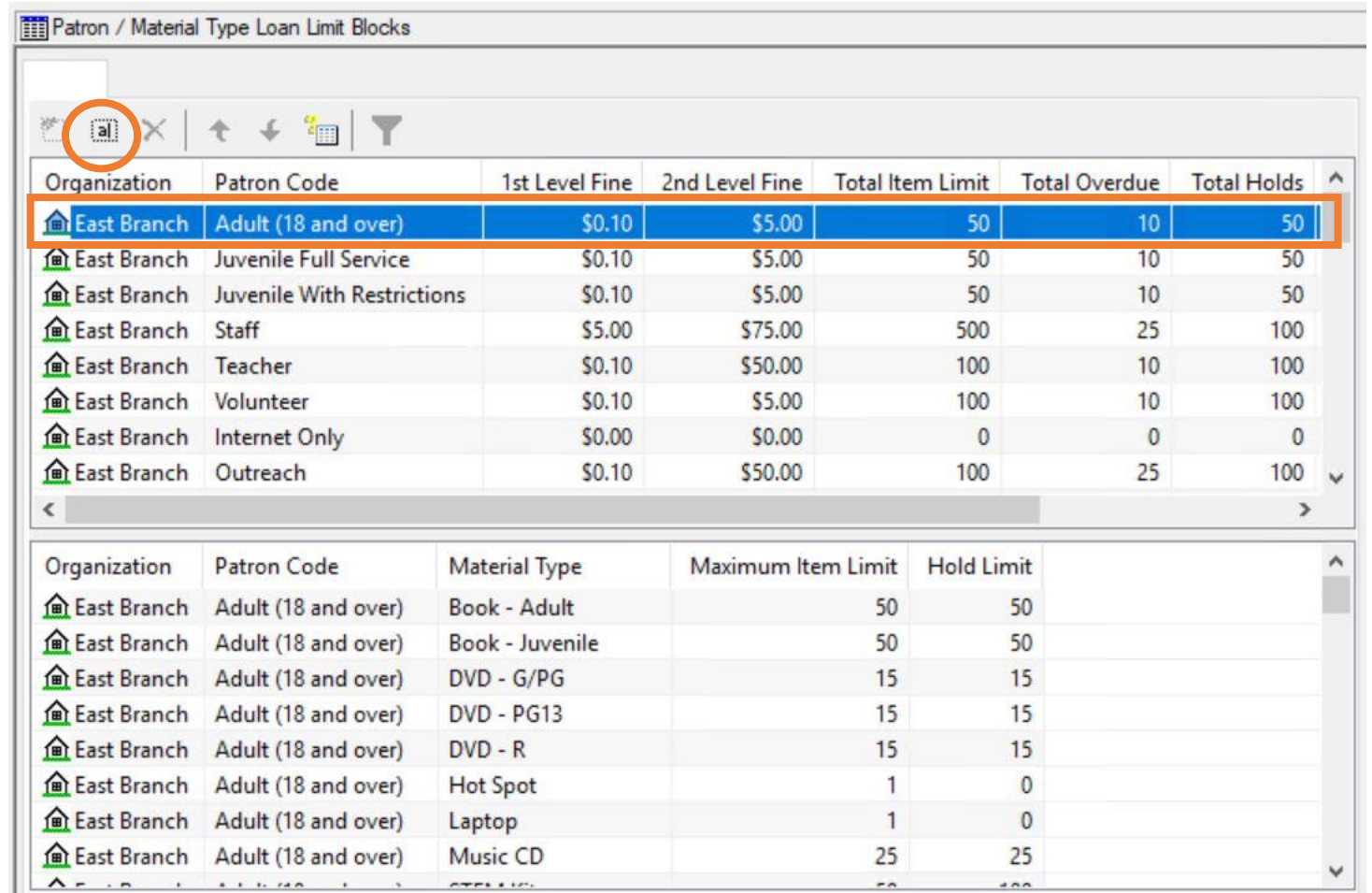| Organization	Patron Code	Material Type	Maximum Item Limit	Hold Limit
East Branch	Adult (18 and over)	Book - Adult	50	50
East Branch	Adult (18 and over)	Book - Juvenile	50	50
East Branch	Adult (18 and over)	DVD - G/PG	15	15
East Branch	Adult (18 and over)	DVD - PG13	15	15
East Branch	Adult (18 and over)	DVD - R	15	15
East Branch	Adult (18 and over)	Hot Spot	1	0
East Branch	Adult (18 and over)	Laptop	1	0
East Branch	Adult (18 and over)	Music CD	25	25

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Total Circulation Limits

- For each patron code/branch combination
  - 1st Level Fine
  - 2nd Level Fine
  - **Total Item Limit**
  - Total Overdue
  - **Total Holds**
  - Total ILL
  - Total Reserve Items

Adjusting Total Circulation Limits

- Select a Patron Code row in the top section of the table
- Click the Modify button

Adjusting Total Circulation Limits

Material Type Limits

- For each patron code/branch/material type combination
  - **Maximum Item Limit**
  - **Hold Limit**

Patron / Material Type Loan Limit Blocks

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East Branch	Internet Only	$0.00	$0.00	0	0	0
East Branch	Outreach	$0.10	$50.00	100	25	100

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East Branch	Adult (18 and over)	DVD - R	15	15
East Branch	Adult (18 and over)	Hot Spot	1	0
East Branch	Adult (18 and over)	Laptop	1	0
East Branch	Adult (18 and over)	Music CD	25	25

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Material Type Limits

- Restricting circulation of specific materials to certain patron codes
  - Set **Maximum Item Limit = 0** to block the patron code from checking out this material type
  - Set **Hold limit = 0** to block the patron code from being able to place hold requests for the material type

Patron / Material Type Loan Limit Blocks

Organization	Patron Code	1st Level Fine	2nd Level Fine	Total Item Limit	Total Overdue	Total Holds
East Branch	Adult (18 and over)	$0.10	$5.00	50	10	50
East Branch	Juvenile Full Service	$0.10	$5.00	50	10	50
East Branch	Juvenile With Restrictions	$0.10	$5.00	50	10	50
East Branch	Staff	$5.00	$75.00	500	25	100
East Branch	Teacher	$0.10	$50.00	100	10	100
East Branch	Volunteer	$0.10	$5.00	100	10	100
East Branch	Internet Only	$0.00	$0.00	0	0	0
East Branch	Outreach	$0.10	$50.00	100	25	100

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East Branch	Adult (18 and over)	DVD - R	15	15
East Branch	Adult (18 and over)	Hot Spot	1	0
East Branch	Adult (18 and over)	Laptop	1	0
East Branch	Adult (18 and over)	Music CD	25	25

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Adjusting Material Type Limits

- Select a Material Type row in the bottom section of the table
- Click the Modify button

Adjusting Material Type Limits

Adjusting Material Type Limits

Material Type Groups

- Optional
- Parameters > Patron Services
- Create groups of material types
- Set checkout limits for all items in the group
- Group limits take precedence over individual material type limits
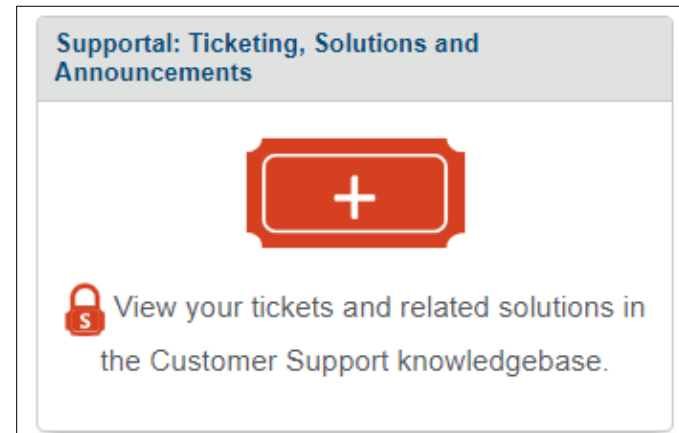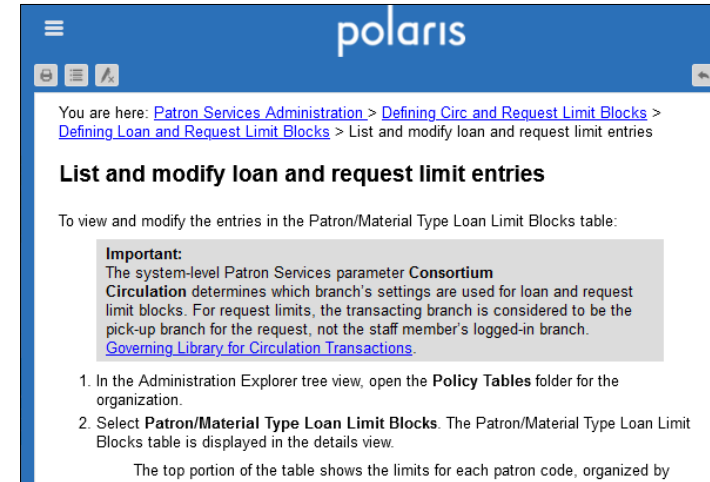
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Consortia or Multi-Branch Systems

- Polaris will observe patron blocks settings for the "governing library."
- Parameters > Patron Services > Consortium circulation > Patron blocks.
- Set to either:
  - Use transacting branch
  - Use patron branch
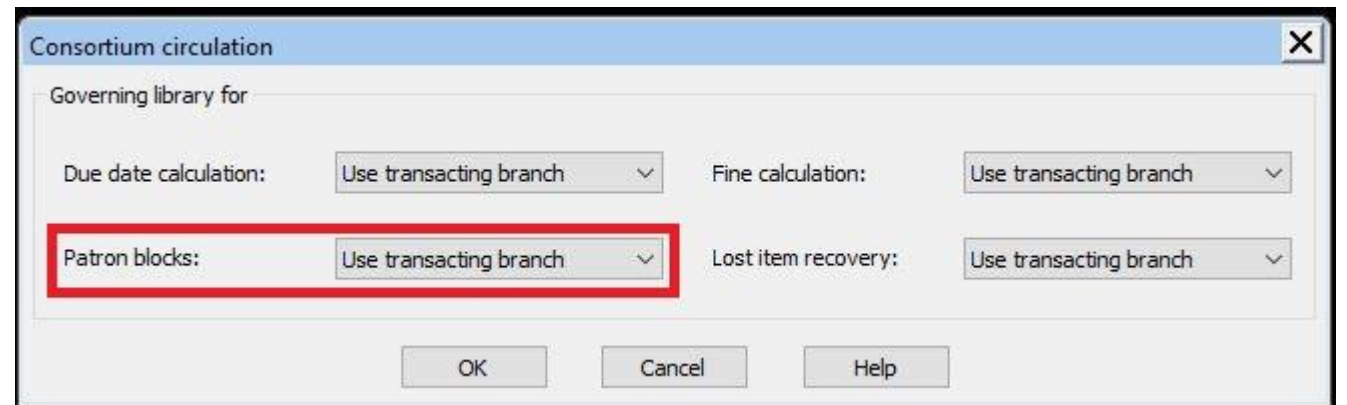
Helpful Resources

- Polaris Help
  - Find the Help documentation for your library's Polaris version at: https://documentation.iii.com/
  - Help files:
    - "List and modify loan and request limit entries"
    - "Defining Loan and Request Limit Blocks"

- Supportal knowledgebase
  - https://support.iii.com
  - Supportal Solutions:
    - "Patron / Material Type Loan Limit Blocks policy table"
    - "How do you block patron codes from checking out certain material types?"

- Your Polaris Site Manager

THANK YOU