



Controlling Circulation

Understanding patron material limits

Elizabeth Biggs, Polaris Site Manager

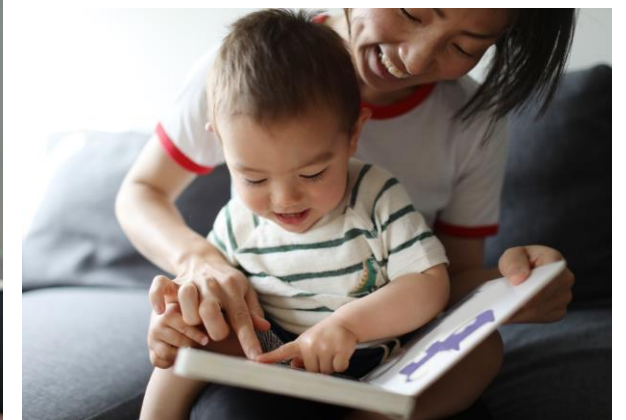
Agenda

- 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

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
There are no items to display on this page...				

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.

The screenshot displays a software interface titled "Patron / Material Type Loan Limit Blocks". It contains two tables. The top table lists loan limits for various patron codes, and the bottom table shows material type limits for a selected patron code.

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
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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

Total Circulation Limits

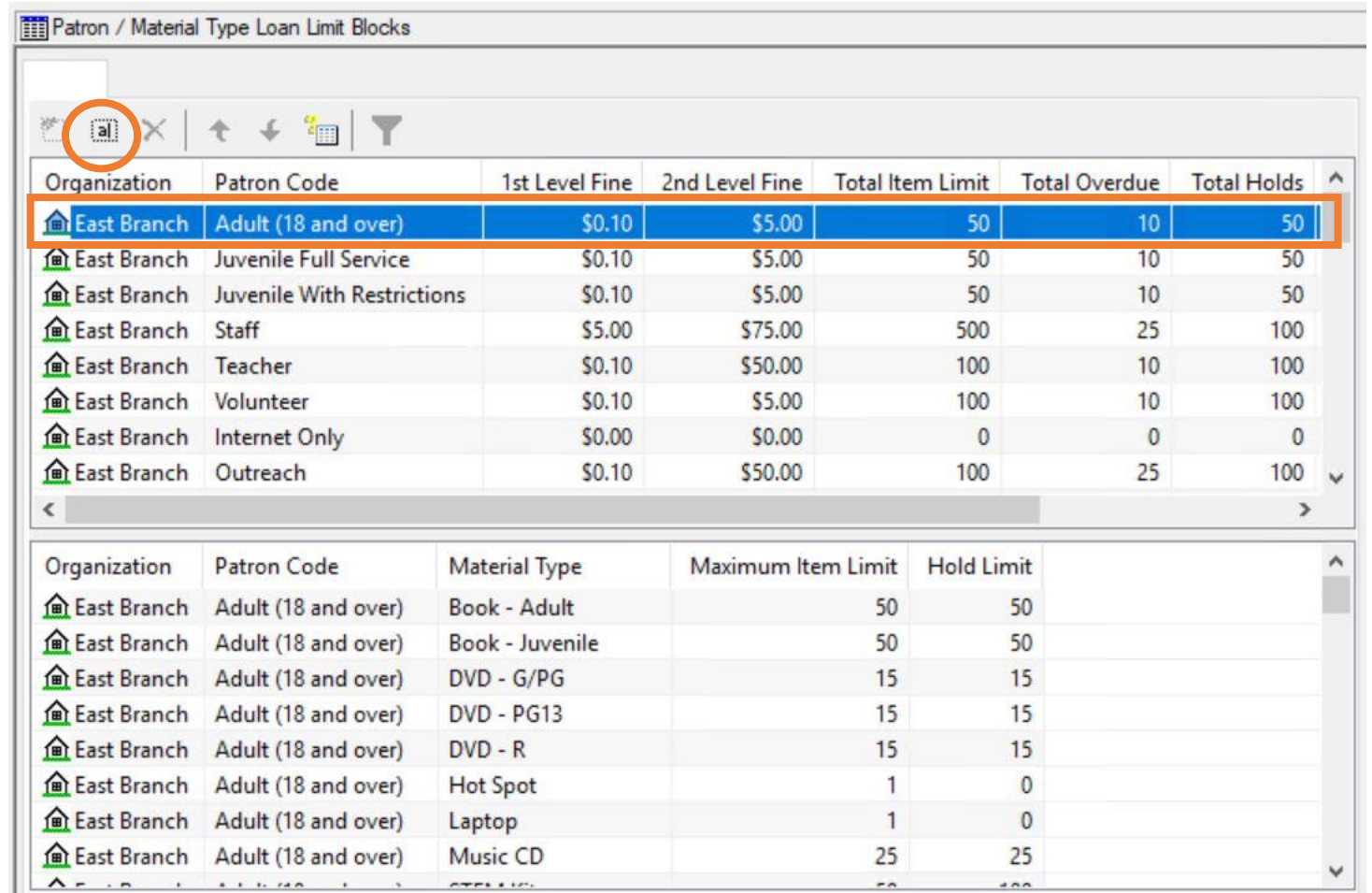
- For each patron code/branch combination
 - 1st Level Fine
 - 2nd Level Fine
 - **Total Item Limit**
 - Total Overdue
 - **Total Holds**
 - Total ILL
 - Total Reserve Items

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 - 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

Adjusting Total Circulation Limits

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




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 - 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

Adjusting Total Circulation Limits

Modify : Patron Loan Limits - East Branch

Organization:	 East Branch
Patron Code:	Adult (18 and over)
1st Level Fine:	\$0.10
2nd Level Fine:	\$5.00
Total Item Limit:	50
Total Overdue:	10
Total Holds:	50
Total ILL:	25
Total Reserve Items:	5

OK Cancel Help

Material Type Limits

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

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
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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
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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

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

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
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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

Adjusting Material Type Limits

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


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
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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
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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

Adjusting Material Type Limits


Modify : Material Loan Limits - East Branch

Organization:	 East Branch
Patron Code:	Adult (18 and over)
Material Type:	Hot Spot
Maximum Item Limit:	1
Hold Limit:	0

OK Cancel Help

Adjusting Material Type Limits

Modify : Material Loan Limits - East Branch

Organization:	 East Branch
Patron Code:	Adult (18 and over)
Material Type:	Hot Spot
Maximum Item Limit:	1
Hold Limit:	0

OK Cancel Help

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

Material Type Groups (sys)

Settings defined at: (sys)

Group Name: DVD

Group definition: Name: DVD

Buttons: Add Group, Modify Name, Delete

Material Type Assignment:

- AB Denver bestsellers
- ART
- Atlas
- BluRay
- Book
- Cake pans
- Cassette
- CPL Informational DVD
- Denver Audiobook--Children's
- DVD - Classic and Series
- DVD- PG13

Patron Code Limit:

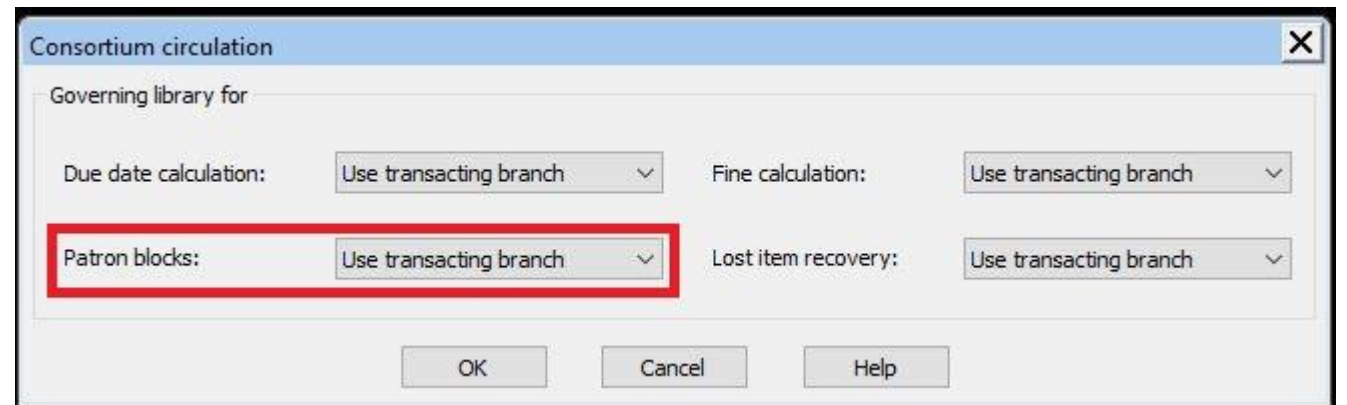
Patron Code	Limit
<input checked="" type="checkbox"/> A Patron Code	15
<input checked="" type="checkbox"/> AB NE2 to block	15
<input checked="" type="checkbox"/> AB's new	10
<input checked="" type="checkbox"/> Adult	10
<input checked="" type="checkbox"/> Adult (Patron 17 and over)	10
<input checked="" type="checkbox"/> Bruce's Internal SQL Training Class	10
<input checked="" type="checkbox"/> Business	10
<input checked="" type="checkbox"/> Business Owners (busown)	10
<input checked="" type="checkbox"/> Chris's Internal SQL Training Class	10
<input checked="" type="checkbox"/> Competitive Intelligence	10

Buttons: Select All, 1, Apply, Unselect All

Buttons: OK, Cancel, Help

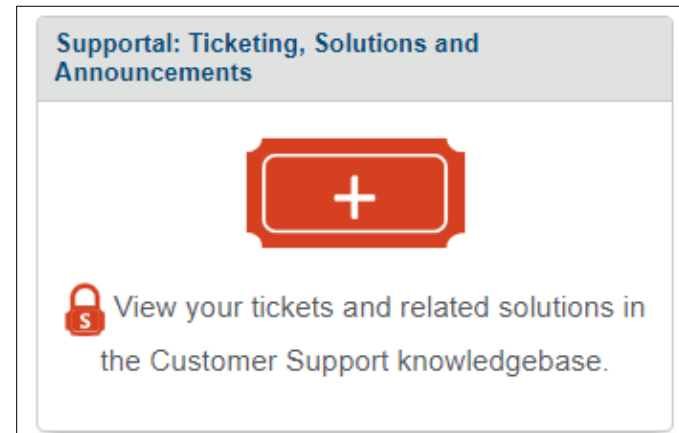
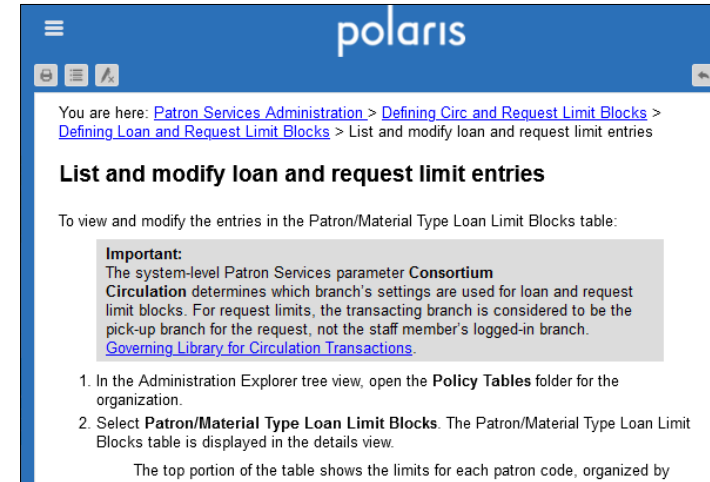
Consortia or Multi-Branch Systems

- 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