

# Making branches, not headaches

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KELLY HOCK, ILS SYSTEM ADMINISTRATOR, CLC

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# What is a branch in Polaris?

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A way to separate a service or location for staff or patrons from the statistics, physical location, permissions or settings from all others at the library

# How does the CLC use branches?

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A separate pickup location

24-Hour pickup lockers

Library Kiosks

Pickup Windows



# How does the CLC use branches?

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## A service that owns items

School Delivery

Library Kiosks

Mobile Book Displays

Vending Machines



# How does the CLC use branches?

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A place to send Items

Repair

Overflow Floating

Withdraw



# How does the CLC use branches?

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a way to keep separate statistics for transactions, reporting

Ready to Read  
Library Tablets  
Technical Services



# How does the CLC use branches?

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## A way to control Permissions

Limiting modification to certain bib records

## A way to test in Production

Assign fake items, patrons, doesn't affect stats & reports

# Adding Workstations vs. Branches

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- Workstations can give you separate statistics for transactions
  - Good for separating Leap vs. Client
- Requires an additional Polaris license
- No canned reports for workstations



## A word on reusing old branches

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- 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

# 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 Patron My Patron group for that library (if applicable)

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

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You don't want to reinvent the  
wheel.

How to minimize the pain?



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

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How to minimize the pain  
**BESIDES** babies and cats?

Ask Ill to set up the branch for you

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The best \$500 you'll ever spend

They've got the scripts

They set up permissions

Quick turnaround

There will still be work to do

# Provide a form for the requester

All the info Ill needs –  
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.fcplib.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

## Provide a form for the requester

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



## Provide a form for the requester

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### Whether the branch will:

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

## Provide a form for the requester

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### What settings can be copied from an existing branch:

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

## Set a reasonable schedule

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### 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

## Create a comprehensive checklist

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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

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## 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

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- 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](#) <sup>1</sup>
- New SIP port has been added (instructions for adding port [here](#) <sup>1</sup>)
- 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/Bibliocommons/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
- Job Desk Setup complete

## Part 1 – Preliminary Steps

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Request a quote

Gather details of branch (requester fills out form)

Open a ticket with III

Notify impacted staff/vendors



# Part 1 – Preliminary Steps

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## Open a ticket with III:

Signed quote

Filled-out Setup Form

3M SIP Port # (if branch is using)

Updated Inn-Reach Profiling document

# Part 1 – Preliminary Steps

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## Notify impacted staff/vendors:

- IT department – new 3M SIP port, updates to website
- Transportation – new pickup location, update routes
- Finance – Create PO, budget, pay
- SearchOhio – Email to Westerville, ticket to III
- 3<sup>rd</sup> party vendors (Bibliocommons, etc.)

## Part 2 – Setup after branch created

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- Add/update workstations
- Manually change settings that couldn't be copied
- Add Overdrive resource group for new branch
- Make sure SIP service responding to new ports
- Update notice wording

## Part 2 – Setup after branch created

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- 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

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

The screenshot shows a web interface titled "Item general filters". It contains several filter sections:

- Item record set:** A dropdown menu with a downward arrow.
- Assigned branch:** A section with two checkboxes:
  - Library quick pick: A list box containing "Alexandria", "Bexley", "Central Library Consortium Electronic Library", and "Columbus Metropolitan Library".
  - Branch: A list box containing "WL Worthington Park After Hours Pickup Locker", "WL Worthington Schools", "zzzdonotuse CML Local History and Genealogy", and "zzzdonotuseCML Weinland Branch". This list box is highlighted with a blue border.
- Collection:** A dropdown menu with "Adult Basic Learning" and "African American" visible.
- Not present:** A checkbox that is currently unchecked.

## Part 3 – Testing

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Review the branch in SA

Compare copied settings from template  
branch

# How I do it

The image displays two screenshots of the 'Administration Explorer - System' interface for the 'Central Library Consortium - Polaris'. Both screenshots show the 'Shelf Locations' table, which lists various library branches and their associated descriptions.

**Left Screenshot:** Shows the 'Shelf Locations' table for the 'CML Driving Park Branch'. The table contains 10 rows of data.

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

**Right Screenshot:** Shows the 'Shelf Locations' table for the 'CML Dublin Branch'. The table contains 11 rows of data.

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

## Part 3 – Testing

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Review System Administration Settings

Settings we've had issues with in the past







## Part 3 – Testing – SA Settings

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

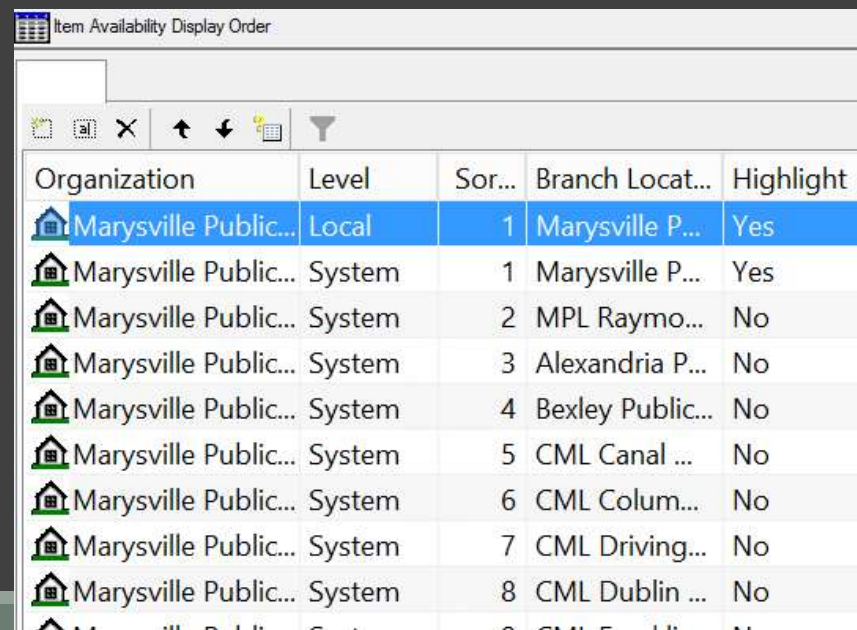
Make sure it's not blank











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)

The screenshot displays the 'Preference Group' configuration window. On the left, the 'Trapping Preference' section has three radio buttons: 'None', 'Prefer my location', and 'Prefer my patron'. The 'Prefer my patron' option is selected. Below it, there are two checkboxes: 'in Preference Group' (unchecked) and 'in Preference Group' (checked). The 'Maintain Queue Position' section has two checkboxes: 'If suspended/inactive' (checked) and 'If re-activated' (checked).

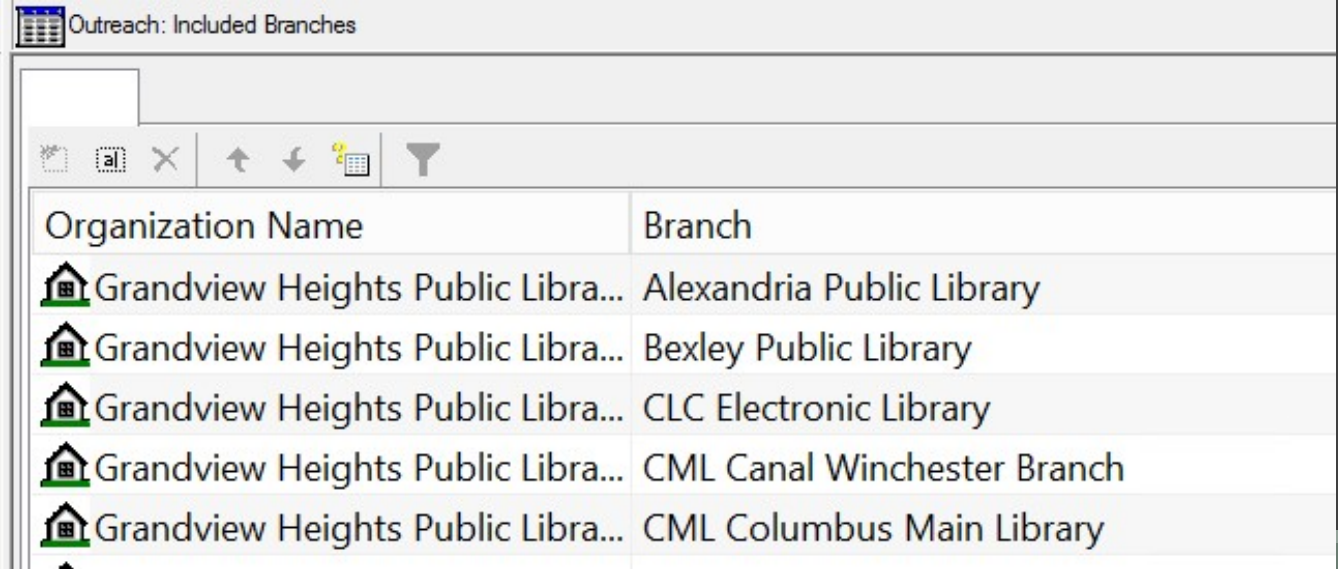
The main area shows a tree view of library branches. The 'Columbus Metropolitan Library' is expanded, showing a list of branches. Each branch has a checkbox and a label indicating its status and group assignment. The following table summarizes the visible branches:






Branch Name	Patron	Group	Checked
Central Library Consortium Electronic 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]	✓

At the top of the main area, 'Group 4' is selected in a dropdown menu, and a message states 'Group 4 has 39 members.'

## 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

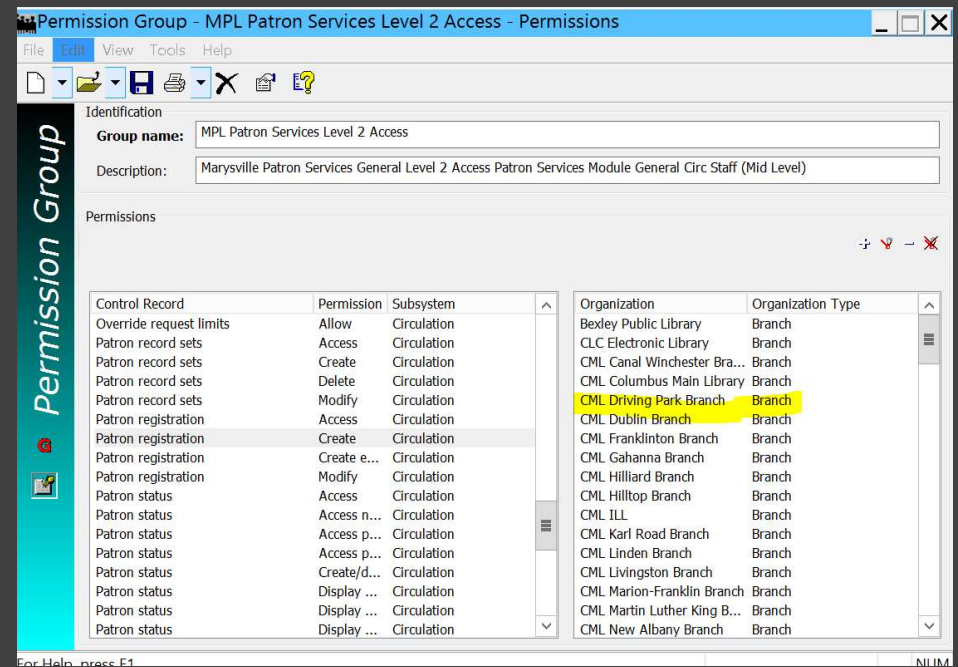
## Part 3 – Testing – SA Settings

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- 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



## Part 3 – Testing - PAC

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- 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

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### Enable as a pickup location

- If only patrons registered 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

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### 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):

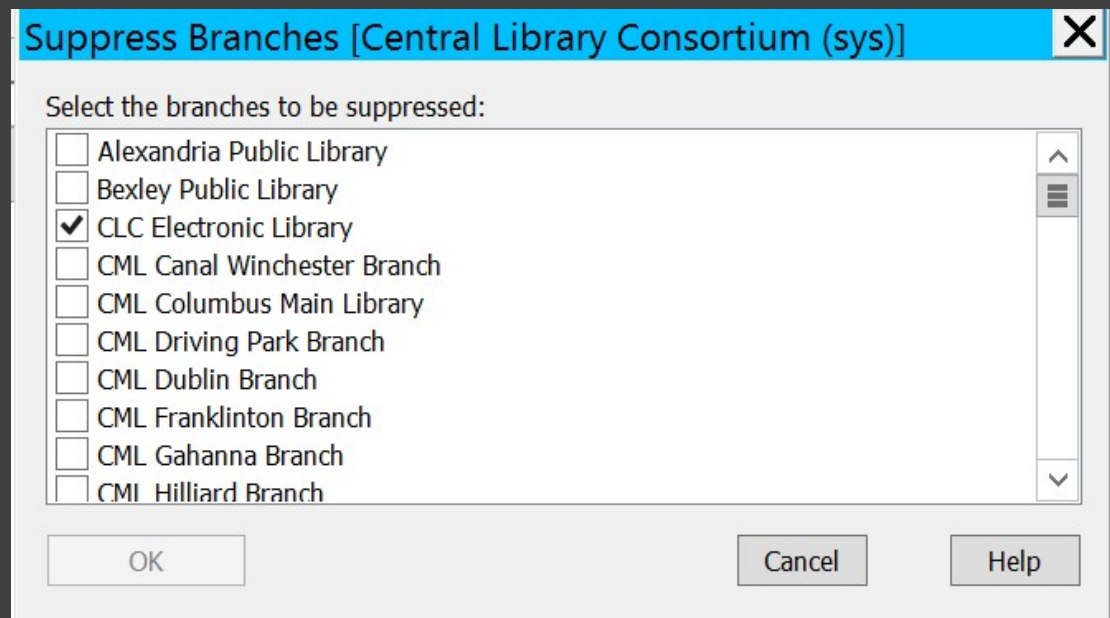
If all material limits exceeded, set to Not Supplied

OK Cancel Apply Help

# Part 4 – Go-Live

Un-Suppress Branch

Turn on branch  
switching in PAC



## Part 4 – Go-Live

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Announce to staff that branch is live

# Thank you!

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## Questions?

### Links:

[CLC's Checklist](#)

[CLC's Branch Setup Worksheet](#)

Email: [khock@clcoho.org](mailto:khock@clcoho.org)