

# Polaris



In attendance: Donna Morris, Anne Fischer, Karen Marriott, Lloyd Lovely, Kay Bauman

Carrie Pearson and Dennis Todd presented a Polaris demonstration. The Polaris mission is: Helping libraries serve their communities. Polaris believes their strength is customer support and developing a partnership with the library.

Every library is given a site manager, who has a MLIS, as well as a Windows Certified Technician.

[Marshall Breeding surveyed](#) libraries about their ILS and the Polaris results were favorable.

County funded libraries that use Polaris include Baltimore, Maricopa, Prince George and Miami. Maricopa County, Arizona and Pierce County, Washington would be considered peer libraries to MLS, i.e., somewhat similar in size and needs. Polaris has about 2,000 libraries using it.

Baltimore was their beta test for the latest edition.

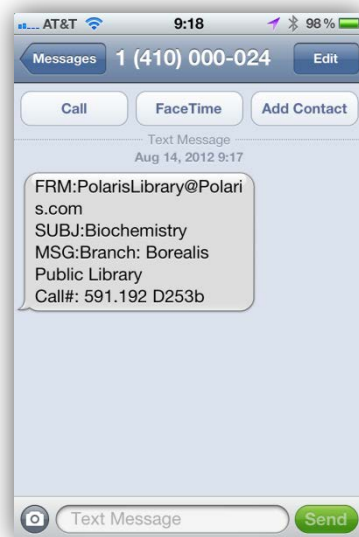
<http://tour.polarislibrary.com/> site is useful to see some parts of their products. There are many customizations available such as the tags. You can login as a 'patron' to go to a live public access catalog (PAC), which is web-based. They also offer a mobile PAC and Owl ilibrary for iPad and Androids.

Homepage:

- You can have a searchable catalog widget on the library homepage, similar to what we have now.
- You can customize the dashboard with RSS feeds.
- They have what they call content carousels that are similar to our slider on the homepage. These can be pre-populated by Polaris or metro library staff can do it.

Public Access Catalog:

- eMedia – Polaris is working with 3M cloud to have it fully within the catalog. Overdrive isn't doing this yet with them.
- For each field (ie: title) you can set it up as a browse or keyword within the field.
- On first search screen, can have buttons below search box



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for title, author, etc.

- Facet boxes can be multi-selected, i.e., you can choose one or several to include in the searching of the catalog while bullets are mutually exclusive
- Customers can have the call number texted to them from the catalog.
- Polaris is [PCI compliant](#) so that customers may pay fines online
- Customers may suspend a hold (reserve)
- Customers may save their catalog searches
- Customers may create bibliographies
- On order materials show in the catalog and can be reserved; no “order pending” listing i.e. PO must go out before any record shows.

Staff Client:

Text message or email or paper checkout receipt

In the staff client of Polaris, right click from just about any screen and you will have a complete menu with many options.

Customer record:

- Five fields of data that we can add in from the customer record and it will be searchable
- Can use a wildcard to search and can sort any field
- Library cards may be associated with other library cards and there is no limit on the number of associations. This is coming on self-check but not available on it now. The permissions are options – specific on how to approve those will be an MLS policy.
- Can set up online ILL request form to go to ILL department; ILL circulation not integrated.
- Tracers (claimed returned) are all permanent.

Polaris Express Check System:

- Forgot card would be an option. Polaris will interface with different products
- Can they text or email a receipt?
- They can pay for fines – will check if they can pay credit card or cash? They don’t think it will accept cash.

Tech Services:

- Marc record is the core of the bibliographic record
- Uncataloged paperbacks would require entering a brief record
- Same search box as in customer record
- Polaris lets you keep deleted bibs/items until you truly purge within a specific timeframe.
- Can limit by things such as location and when we close window the limits clear out.

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## Acquisitions

- Reps unsure if can batch order items numbers or use our barcode system: indicate would work with us.
- Can order electronically with major vendors
- Invoices received in Polaris electronically
- AMS, Peoplesoft – are financial packages that do interface with Polaris

## Reports

- 3 levels of reports
  1. Front line
  2. Canned
  3. Simply reports – web-based (also a raw SQL option)
- Notices can go out in other languages besides English.
- We can change the field names

## [Chilifresh](#) connection with social networks

They have the ability to take reserves out for a library temporarily closing

6-12 months implementation. All of the training on our data at the library They can train a trainer or train all of the staff (costs more)

Interfaces with most all of the PC reservation systems – any 3<sup>rd</sup> party tools they can interface with. If there is a 3<sup>rd</sup> party they haven't worked with they will see if they can.

Permission under 17 – is there a way to block checking out? They don't have anything like our PPO.

They have a proprietary product called "Site Scan" that continually evaluates the health of the server and the database and automatically logs a ticket if it finds a problem.

Their MobilePAC is platform agnostic meaning that it will run both on an iPhone/iPod and the Android operating system.

You can save a search and set it up where it runs at a certain time intervals and e-mails the results to you. Example: If you wanted to know if the library had received new materials on a particular subject, you could save the search and then have it run it once a week or once a month and e-mail you the results.

You can right click on an item that has been checked in and get a link to the last borrower.

There are two different types of check-in: Normal mode and Bulk mode. Normal mode would be if the customer were standing there and wanted to pay the fines on the material; Bulk mode would be if you were clearing the book drop and you didn't want to be told every time you checked in material that there was a fine on it.

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During the afternoon Donna, Anne, Karen escorted the Polaris reps to see Cataloging and Tech Processing at the Service Center. Pauline, Heidi and Anne showed them some of the processing done at the Service Center, which included Big Bin, the tagging stations, and the sorter, all of which are important components to our ILS system.