



POLICY TESTING

We want to make sure that all of your Polaris settings and policies are working correctly. Below, you'll find a list of specific things to review.

Directions:

- ▶ Using the training database, check out and place holds for a variety of different patron codes! This includes:
 - MGK patrons (MGK resident, MGK Exempt, MGK Juvenile, MGK Outreach, MGK Educational, In-House Use, MGK Limited Use)
 - Reciprocal patrons
 - CPL patrons
 - Non-MGK CCS patrons (for example, a Niles or Glenview cardholder).

***Tip: It's ok to use patron accounts that already exist in the training database. Don't worry--you won't break anything!

- ▶ Use a variety of different material types when testing, including new, hot and regular materials. There are 74 material types in all, and staff should test checking out each material type to the above kinds of patrons.

Policies to Test

Checkout and Hold Limits

When testing, pay attention to:

- Are non-MGK patrons blocked from checking out restricted items, such as hot materials that should only be available to your patrons? Are MGK patrons allowed to check out these material types?
- Are checkout limits working properly for Material Types that patrons can only check a limited number of items out, such as tablets or laptops?

Loan Periods

When testing, pay attention to:

- Are items with different loan periods checking out for the correct number of days?
- Are patron codes with extended loan periods (such as educational cards) being given the correct amount of time?

Fine Codes

When testing, pay attention to:

- In January, MGK patrons will not be charged overdue fees for items checked out at MGK! Check out a few items with a backdated due date. Are MGK patrons being charged overdue fees?
- Are non-MGK patrons being fined the correct daily/hourly fee for overdue items?
- Are fines being capped at the correct maximum fine amount?

Reporting Issues to CCS

If you come across an error, please email help@ccslib.org with the specific information that is incorrect, and include what the correct information should be.

Make sure to include the appropriate record IDs, barcodes and screenshots if applicable!