polaris

What's New in Polaris and Leap

6.3

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Polaris Installation Notes

Important:

When the new Polaris release is installed on a workstation, the file path changes from 6.2 to 6.3 as in the following examples: C:\ProgramData\Polaris\6.3 C:\Program Files\Polaris\6.3 C:\Program Files (x86)\Polaris\6.3

New and Modified Polaris Administration Settings

The following table lists the new and modified profiles, parameters, and permissions in Polaris Administration.

Setting	Purpose	Level
New Permissions		
Cataloging: Cata- loging record sets: Delete/Undelete	Adds the ability to permission the undelete of Cataloging record sets that have been marked for deletion.	Staff
Patron record sets: Delete/Undelete	Adds the ability to permission the undelete of Patron record sets that have been marked for deletion.	Staff
Leap: Setup Off- line: Allow	Controls which users can complete the Leap Offline installation.	System
System Admin- istration: Modify genders table: Allow	Allows you to modify the new Database table, Genders Table.	Staff, Workstation, Permission Group
Item Bulk Change Templates: Access	Allows users to view and use the saved item bulk change template data.	Staff, Workstation, Permission Group
Item Bulk Change Templates: Create	Allows users to create new saved bulk change templates.	Staff, Workstation, Permission Group
Item Bulk Change Templates: Modify	Allows users to modify existing saved bulk change templates.	Staff, Workstation, Permission Group
Item Bulk Change Templates: Delete	Allows users to delete saved bulk change item bulk change template data.	Staff, Workstation, Permission Group
Use 'own' item bulk change tem- plates: Allow	Allows staff to 'own' item record bulk change templates.	System

Setting	Purpose	Level
New Profiles		
Cataloging: Auto- matically populate authority heading in Find Tool dur- ing check head- ings	Lets you enable or disable the automatic pop- ulation of the heading in the Authority Records - Heading Find Tool when checking for duplicate headings.	System
PowerPAC: Title Display: Number of characters in the Summary (Short)	Allows you to specify the maximum number of characters of the Summary (Short) field that are displayed in the brief and full search results views for a title in the Polaris PowerPAC.	Branch
PAC: Reset pass- word link timeout duration	Allows you to determine the time period (in minutes) during which the reset password link emailed to the patron remains active.	System, Library, and Branch
Patron Services: Retain deleted pat- ron record sets.	Enables the system to retain deleted patron record sets.	Systems
Cataloging: Retain deleted cataloging record sets	Enables the system to retain deleted cata- loging record sets.	Systems
New Parameters		
Request: Total holds thresholds include Inactive	Lets you specify whether inactive hold requests count toward a patron's total holds limit.	System
Patron Services: Patron Regis- tration Filter genders	Allows you to manage gender drop down lists.	Branch
Patron Services:	Allows you to suppress gender tracking in Staff Client and Leap.	Branch

Setting	Purpose	Level
Patron registration options		
Modified Profiles		
PAC: Patron access options: Self-registration: Suppress gender selection	Allows you to suppress gender in Self-Regis- tration.	Branch
PAC: Patron Access Options: Login	Enable option to send patrons a reset pass- word link.	Branch
Modified Parameters:		
Credit Card Pay- ment: Online Pay- ment Settings: Configure	A new JetPay option in the Payment pro- cessing gateway list allows you to configure Polaris to use JetPay for processing credit card payments from PowerPAC.	Library, Branch

MARC Updates Implemented in Polaris 6.3

The updates specified in the October 26, 2018 MARC technical notice were implemented in Polaris 6.3.

WebAdmin Updates

The tables below lists the most important new strings added in Polaris 6.3.

ExpressCheck Strings

Mnemonic String	Text
EC_TEXT_FORGOTPASSWORD_1010	The e-mail could not be sent. Please con- tact the library for assistance.
EC_TEXT_FORGOTPASSWORD_EMAIL_ HOURS	Click on the following link to set/reset your password: Reset Password Link: {0} This link can be used to reset your pass- word, and will expire in {1} hours. If the link is expired, request a new one: {2} If you did not request to reset your pass- word, please ignore this message. Sin- cerely, Your Library System Administrator
EC_TEXT_FORGOTPASSWORD_EMAIL_ MINUTES	Click on the following link to set/reset your password: Reset Password Link: {0} This link can be used to reset your pass- word, and will expire in {1} minutes. If the link is expired, request a new one: {2}If you did not request to reset your pass- word, please ignore this message. Sin- cerely, Your Library System Administrator

MobilePAC Strings

Mnemonic String	Text
MP_ACCOUNTLOGON_RESET_SUCCESS	Your password has been reset.
MP_CRUMBS_RESETPWD	Reset Password
MP_HOLD_REQ_AVAIL_ERROR	Hold Requests are not allowed for this

Mnemonic String	Text
	title
MP_MSG_FORGOTPASSWORD_EMAIL_ HOURS	Click on the following link to set/reset your password: Reset Password Link: {0} This link can be used to reset your pass- word, and will expire in {1} hours. If the link is expired, request a new one: {2} If you did not request to reset your pass- word, please ignore this message. Sin- cerely, Your Library System Administrator
MP_MSG_FORGOTPASSWORD_EMAIL_ MINUTES	Click on the following link to set/reset your password: Reset Password Link: {0} This link can be used to reset your pass- word, and will expire in {1} minutes. If the link is expired, request a new one: {2} If you did not request to reset your pass- word, please ignore this message. Sin- cerely, Your Library System Administrator
MP_MSG_FORGOTPASSWORD_INFO_ BARCODE_RESET	Your reset password link has expired. Please submit your Barcode below to request a new one.
MP_MSG_FORGOTPASSWORD_INFO_ USERNAME_RESET	Your reset password link has expired. Please submit your Username or Barcode below to request a new one.

PowerPAC Strings

Mnemonic String	Text
PACML_DASH_CHILDFICTIONSERIES	Children's Fiction Series
PACML_DASH_CHILDILLUSTRATED	Children's Illustrated
PACML_DASH_DONATION	Make a Donation
PACML_DASH_EARLYMIDDLE	Early and Middle Grade Readers (sys

Mnemonic String	Text
	cust)
PACML_DASH_HARDFICTION	Hardcover Fiction
PACML_DASH_HARDNONFICTION	Hardcover Non-Fiction
PACML_DASH_MASSMARKET	Mass Market
PACML_DASH_MOSTCIRCAUTHORS	Most Circ'd Authors
PACML_DASH_MOSTCIRCSUBJECTS	Most Circ'd Subjects
PACML_DASH_MOSTCIRCTITLES	Most Circ'd Titles
PACML_DASH_NEWTITLES	New Titles
PACML_DASH_ONORDERITEMS	On-Order Items
PACML_DASH_PAPERFICTION	Trade Paperback Fiction
PACML_DASH_PAPERNONFICTION	Trade Paperback Non-Fiction
PACML_DASH_YOUNGADULT	Young Adult
PACML_FORGOTPASSWORD_1014	Your reset password link is invalid or has expired. Please submit your Username or Barcode below to request a new one.
PACML_FORGOTPASSWORD_1015	Your reset password link is invalid or has expired. Please submit your Barcode below to request a new one.
PACML_FORGOTPASSWORD_CONFIRM	Confirm Password:
PACML_FORGOTPASSWORD_EMAIL_ HOURS	Click on the following link to set/reset your password: Reset Password Link: {0} This link can be used to reset your pass- word, and will expire in {1} hours. If the link is expired, request a new one: {2} If you did not request to reset your pass- word, please ignore this message. Sin- cerely, Your Library System Administrator

Mnemonic String	Text
PACML_FORGOTPASSWORD_EMAIL_ MINUTES	Click on the following link to set/reset your password: Reset Password Link: {0} This link can be used to reset your pass- word, and will expire in {1} minutes. If the link is expired, request a new one: {2} If you did not request to reset your pass- word, please ignore this message. Sin- cerely, Your Library System Administrator
PACML_FORGOTPASSWORD_INST	Please create a new password. You will then be directed to log in.
PACML_FORGOTPASSWORD_NEW	New Password:
PACML_FORGOTPASSWORD_SHOW	Show password
PACML_FORGOTPASSWORD_TITLE	Reset Password
PACML_JETPAY_DONATION_NOTE	Thank you for your Donation.
PACML_JETPAY_PAYMENT_NOTE	Thank you for your payment.
PACML_JETPAY_TRANSACTION_ERR	There is a problem with your payment. Please contact the library for assistance.
PACML_LOGON_PASSWORDRESET	Your password has been reset.
PACML_PROCESSINGFEES_JETPAY_ERR	JetPay fee is \$0.00 or there was a JetPay API error. You will see the fee when you are at the JetPay site.
PACML_SUMMARYLESS	Less
PACML_SUMMARYMORE	More

Polaris API Changes

The table below is a list of changes to the Polaris APIs for v6.3.

Method Name	Purpose
PickupBranchesGet	This new endpoint returns a list of valid pickup branches based on the organ-ization ID.
ShelfLocationsGet	This new endpoint returns a list of shelf locations based on the organization ID.
Synch_BibsPagedGet	This new endpoint allows a paged extraction of bib record data.
ItemUpdateBarcode	The new parameter BarcodeOrID has been implemented that enables a bar- code to be updated using either the item ID or the item barcode as an identifier. An additional new parameter, isBarcode, specifies whether the identifier used is an item record ID or a barcode.
PatronHoldRequestGet	A new CanSuspend Boolean property has been added that indicates whether a patron's hold request can be sus- pended.
PatronReadingHistoryClear	Now removes a range of historical read- ing history entries by specifying their ID using the new id query string parameter.

For more information, see the **Polaris API Reference for v6.3**.

Bulk Update Purchase Order Notes

You now have the ability to update purchase order line item notes in bulk from the Purchase Order workform.

The **Update Note** option is now in the right-click menu for purchase order line items. You can select one or more notes to update with this option.

FO			Purchase Ore	der - 246	512 - Lin	e Items	- Pola	ris				x
File Ed	it View	Links Tools Help										
	2] 🕹 🗙 冶	√2 , ⊵°			۶ (P 😰				
5	Numbe	- SAR38					Status:	Pending			3/14/2018	
e	Numbe	. SAR30				°	status:				3/14/2010	
\mathbf{p}	Type:	Firm Order 🗸 🗸	Lines: 21	Total:	398.24		Method	Purchase		~		
Order	Line Iten	IS										
Purchase (Í			à 📲 🍾	r	\$
ğ	Line	Title	Author	ISBN/ISS			Orde.	Rece	Invoi	Fund	Status	^
5	1	Intermediate English (ESL)		15738500		\$80.00				2017BR		
Ξ,	2	Perfecting the sounds of A		0844204	79X	\$17.95	1			2017BR		
	3	Time and again	Roberts, No	037	Open					2017BR		
а,	5 6	Instant immersion. English		159 159	Place Ho	ld				2017BR		
C	0 7	Instant immersion. English American English pronuncia		060	Receive					2017BR	Pending Pendina	
	1 8	Teach vourself. American		065				0	0	2017BR	Pending	=
4	1 9	Teach yourself. English vo		065	Undo Re	ceipt		0	0	2017BR	Pending	
	10	Common American phrases	Spears, Ric	123	Update N	lote		ő	0	2017BR	Pendina	
-	11	English for new Americans	Piñeiro, Carol.	140	Copy To			õ	õ	2017BR		
	1 12	In English on your own [DVD]		094	Claim			0	0	2017BR	Pending	
2	13	Crossroads Cafe [videorec						0	0	2017BR	Pending	
	14	English for new Americans		060	Cancel			0	0	2017BR	Pending	
	15	Easy English : [DVD] an ES			Close			0	0	2017BR	Pending	
	16	Easy English : [videorecord			Print			0	0	2017BR	Pending	
	17	Culture clips [videorecording]			1.1			0	0	2017BR	Pending	
	18	Fast & easy. Ingles basico		958	Links			0	0	2017BR	Pending	~
	1	•		_	Delete					1		
		canceled.										

Note:

This menu option is not enabled if any of the selected purchase order line items have a status of Closed.

Selecting this option will open the **Update Notes** dialog with two note types:

- Public Note
- Non-Public Note

Both note types have the following options:

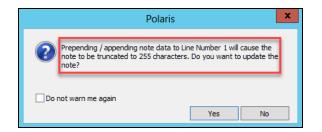
- **Replace** replaces the existing note.
- **Prepend** inserts the new note and a blank line before the existing note.
- **Append** inserts a blank line and the new note after the existing note.

		Update Notes	
Notes			
Public note:			×
		O Prepend	O Append
Non-public note	:		×
	○ Replace	O Prepend	
	O	K Cancel	Help

If Replace is selected and text is not entered in the note field, the existing note will be deleted.

Notes longer than 255 characters will be truncated to 255.

If prepending or appending causes a note to be larger than 255 characters, you will see the following message:



- Yes updates the note(s).
- No returns you to the Purchase order updating only the line items where the data would not be truncated. The above message will appear for each line item that may be truncated.
- Cancel returns the user to the purchase order with the line item(s) still highlighted.

New Index to Increase Workslip Speed

A new index was added to speed up the printing of PO line item work slips.

Automatically Populate Authority Heading in Find Tool During Check Headings - Staff Client

A new administration setting lets you enable or disable the automatic population of the heading in the **Authority Records - Heading Find Tool** when checking for duplicate headings.

Open Administration Explorer > Profiles > Cataloging:

P Administration Explorer - System - QA-YODA 6.3 - Polaris								
File Edit Help	File Edit Help							
P Administration Explorer - Sy	Profiles							
P Administration Explorer - S System: QA-Polaris	Acquisitions / Serials Patron Services Cataloging PAC PowerPAC Children's PAC Staff C	ient Mobile PAC Community						
Parameters Profiles								
Permissions	Profile	Value						
Policy Tables	P Automated MARC validation: Authority	Yes						
🖽 🛅 Database Tables	P Automated MARC validation: Bibliographic	Yes						
Notification Tables	${\mathbb P}$ Automatically populate authority heading in Find Tool during check headings	No						
E Server	Automatically sort MARC authority records	Yes						
⊞– <mark>îo</mark> Library ⊞– îo Branch	Automatically sort MARC bibliographic records	No						
Collection	Bibliographic records: Automatic display in PAC processing	Setup						

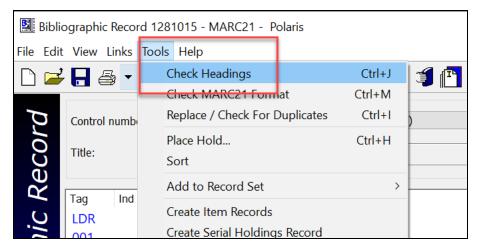
The default value for this setting is No.

It is available at the System, Library, Branch, Work Station, and Staff Member levels.

If this setting is enabled, the Find Tool is automatically populated when:

1. The user is working in a bibliographic record with an unlinked heading.

2. A heading check is triggered either by saving the record as final or by selecting **Check Headings** from **Tools** in the record workform:



3. The <u>Check Headings Assistant Dialog Box</u> displays the headings with no matching authority record, and the user selects **Details** for one of the headings:

Check Headings Assistant		×
The bibliographic headings with no exac	t authority matches are listed below.	ОК
Heading 650 7 ‡aJuvenile Fiction	Solution Leave heading unlinked	Details
		Edit Record
		Preview
		Cancel
		Help

4. The <u>Check Headings Details Dialog Box</u> opens, and the user selects **Find** to search for a matching heading:

'Check Heading(s)' Details	\times
Bibliographic Heading: 650 7 ‡aJuvenile Fiction Possible Authority Records	
Heading 150 ‡aChildren's stories 155 ‡aJuvenile fiction.	Open Find
Conditions	
The bib heading tag number does not match this authority record	
Solution	

5. The **Authority Records - Heading Find Tool** appears with the **For** option prepopulated using the heading subfield a.:

	y Records - Heading Find Tool		—	
File Edit To	ols Options Help			
General Set	ttings Databases			
Object:	Authority Records	 Limit by: (None) 	 ✓ ✓	Search
Search by:	Heading	Value:	O Power	Stop
Type:	Exact match (implicitly truncated)	\checkmark	⊖ SQL	New Search
Sort by:	(None)	V	Count Only	Clear
For:	Juvenile Fiction	~		Help
For Help, pres	ss F1	Close on Select		

Note:

The user can change the search criteria before executing the search in the Find Tool and search terms do not persist between searches.

Retain Bibliographic Control Number During Overlay/Replace

Duplicate detection now maintains the control number of the existing bibliographic record by default during the import overlay/replace process. Import permissions remain unchanged.

When you choose **Save incoming record as final; replace database record**, the existing record is overlayed by the new incoming record but its control number is retained.

Polaris Import Setup - Full							
Profile setup Bibliographic Records Item Records Authority	Records Record Se	ets					
Bibliographic Save Options							
● Save all records as final	y in PAC	Delete MARC Tags on incoming record System defined deletion tags					
O Save all records as provisional	t overlav	○ Profile defined deletion tags					
O Do not save any records	tovenay						
Record owner: QA-YODA 6.3 (sys)	~						
When Saving Bibliographic Records as Final							
Perform MARC 21 Validation If validation errors are found: Save record as provisional If a suspected duplicate detection rules If a suspected duplicate is found: Save incoming record as provisional	 Automa Do not 	vity Control Ing heading is found: atically create new authority record; save bibliographic create authority record; save bibliographic record as fil create authority record; save bibliographic record as pr -> ->	nal				
Save incoming record as final; do not replace database Save incoming record as final; replace database record Save record with highest encoding level. If encoding level. Save incoming record as final; replace database Reject incoming record Save incoming record as provisional (ignore 'Kee Reject incoming record; add MARC retention tags to d	i vels match: record p MARC Tags')	Keep MARC Tags System defined overlay retention tags Profile defined overlay retention tags					
		Import	Cancel Help				

When you choose **Save record with highest encoding level. If encoding levels match:**, the **Save incoming record as final; replace database record** option is selected by default. You can also choose to reject the incoming record or save the incoming record as provisional. The control number is retained only when saving the record as final.

	Polaris Import Setup - Full
Profile setup Bibliographic Records Item Records Authority	Records Record Sets
Bibliographic Save Options Save all records as final Save all records as provisional Do not save any records Record owner: QA-YODA 6.3 (sys)	Delete MARC Tags on incoming record O System defined deletion tags overlay
When Saving Bibliographic Records as Final	
 Perform MARC 21 Validation If validation errors are found: Save record as provisional Ignore errors; save record as final 	Perform Authority Control If no matching heading is found: Automatically create new authority record; save bibliographic record as final Do not create authority record; save bibliographic record as final Do not create authority record; save bibliographic record as provisional
Perform Duplicate Detection Use system defined duplicate detection rules Use profile defined duplicate detection rules If a suspected duplicate is found: Save incoming record as provisional Save incoming record as final; do not replace database Save incoming record as final; replace database record Save record with highest encoding level. If encoding level	System defined overlay retention tags
Save record with highest encoding level. If encoding level Save incoming record as final; replace database n Reject incoming record Save incoming record as provisional (ignore 'Keep Reject incoming record; add MARC retention tags to database to database the database of the databas	ecord MARC Tags')

Interactive Save of a Brand New Record

When creating a new bibliographic record, or importing and saving a new bibliographic record using z39.50, the control number of the existing record will automatically be retained when there is only one duplicate. You can choose which control number to retain when there are multiple duplicates available.

A new column called Maintain control number has been added to the **Duplicate Detection** dialog.

	Replace / Check For Duplicates (Bibliographic Records)										
Retain this rec	ord:										
Control n	Owner	Title			Autho	or	Format	Linked items	Statu	5	
	QA-YODA 6	. Horses /			Redd	ick, Kate.		0			
Records to rep	lace:			C 🗖	À	₽					
Maintain cont	rol number	Control nu	Owner	Title		Author	Format	Linked items	Status	System-de	
		142273	QA-YODA	Horses		Reddick, Kate	e. Book	3	Final	LCCN;Aut	
<				Ш						>	
	[Replace All	Replace S	elected		Car	ncel	Help			

If only one duplicate is found, the check box is checked by default and cannot be unchecked. the control number of the suspected duplicate will be the one retained. The record owner is also retained. This requires the **Bib record modify** permission (overridable), and will update the modification date of the existing record.

	Replace / Check For Duplicates (Bibliographic Records)									
Retain this rec	cord:									
Control n	Owner	Title			Author	r	Format	Lir	inked items	Status
	QA-YODA 6.	Horses /			Reddic	k, Kate.		0		
Records to rep	ace:			R	Ê	s • e				
	ontrol nu 0	Owner	Title	Author		Format	Linked items	Status		tected duplicate
✓ 14	12273 Q	QA-YODA	Horses	Reddick,	Kate.	Book	3	Final	LCCN;Auth	or/Title;Title/260 \$c;
٢		Replace A	All Replace Selecte	III		c	ancel	Help)

If more than one suspected duplicate record is found, the user will have the option to select which records to replace, and of those records, which control number will be retained.

			Replace / G	Check For Dup	licates (Biblio	graphic Reco	rds)		x
Retain this	record:								
Control n.	Owner	Title			Author	Format	Lir	nked items	Status
	QA-YODA	6 Horses /			Patent, Dorothy	Hin	0		
						a			
Records to r	replace:				┢┙	8			
Maint	Control nu	Owner	Title	Author	Format	Linked iten	ns Status	System-det	tected duplicate
	468457	QA-YODA	Horses	Patent, D	Doro Book	2	Final	LCCN;ISBN	;Author/Title;Title/2
	1413811	QA-YODA	Horses	Patent, D	Doro Book	1	Final	LCCN;ISBN	;Author/Title;Just Ti
-									
<									>
		Dealara	All Declare	Calculated		Consel	L L L		
		Replace	Replace	Selected		Cancel	Help		

Records in a status of provisional are not eligible for this feature, and will have a disabled check box.

Saving Default Remote Databases for Bibliographic Record Searches

You can now save default remote databases that Polaris searches when you use the Find Tool to search for bibliographic records.

Note: Default search databases are associated with your user account.

To save default search databases:

- 1. Open the Find Tool for bibliographic records and navigate to the **Databases** tab.
- 2. Select the remote databases you would like to search.
- 3. Select **Options > Save as User Default**.

Polaris saves your preferred remote search databases. When you open the Find Tool for bibliographic records in the future, your preferred search databases are already selected.

To clear saved default search databases:

- 1. Open the Find Tool for bibliographic records, and navigate to the **Databases** tab.
- 2. Select Options > Revert to System Default.

If an administrator deletes a remote database that is being used as a default search database by one or more users, the database is automatically removed from each user's saved default search databases.

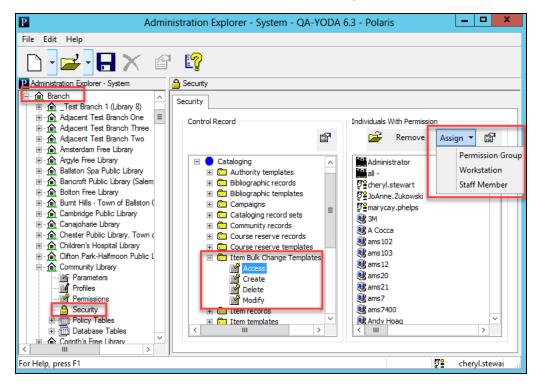
Save Item Record Bulk Changes as Templates

You now have the option to save item record bulk change settings as templates to reuse your item bulk change criteria. This feature is available in the Staff Client and Leap.

The following new permissions must be assigned to enable this feature. They can be assigned at the Permission Group, Workstation, and Staff member levels.

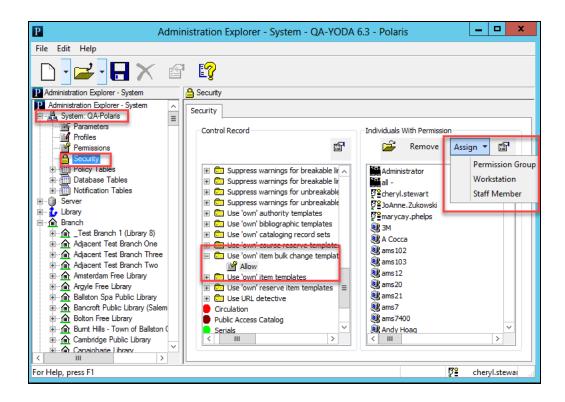
At the branch level, Item Bulk Changes Templates:

- Access allows users to view and use the saved criteria.
- Create allows users to create new saved bulk change templates.
- Modify- allows users to modify existing saved bulk change templates.
- Delete allows users to delete saved bulk change criteria.



The following new permission is necessary if the library wants to allow staff to 'own' item record bulk change templates. If the library wants all templates to be owned at the sys/lib/branch levels, then they would not assign this permission to staff.

At the system level: Use 'own' item bulk change templates > Allow.



The Staff Client Item Bulk Change dialog is updated to include these options:

- **Template** select an existing item record bulk change template available to you.
- Save modify an existing template.
- Save As save item bulk change criteria as a new template.

• **Delete** – delete an existing template.

Item Record Bulk Ch	ange - Number of records: 5
Template: (None)	✓ Save Save As Delete
Location Circulation Call Number Note	es/Blocks Misc Report/Record Set
Owner:	
Assigned branch:	✓
Assigned collection:	v
Shelf location:	V
Home branch:	✓
Temporary location:	
	OK Cancel Help

The Leap Item Bulk change workform is updated to include these options:

• SAVE AS TEMPLATE - save item bulk change criteria as a new template.

Item Record Bulk Change Joan Aiken		UPDATE ITEMS SAVE AS TEMPLATE CANCEL
Bulk Change Report		Template
ItemBulkChangeReport_20190617152955.txt		(None)
Error Record Set		
Name		Owner
		cheryl.stewart 🔻
<u>Q Location</u> O Circulation O Call Number D Blocks and Notes O Miscellaneous		
Owning Branch	Shelf Location	
(No change)	(No change)	¥
Assigned Branch	Home Branch	
(No change) v	(No change)	¥
Collection	Temporary Location	
(No change)		

• **Template** - select an existing item record bulk change template from a list of templates available to you.

oan Aiken				
eryl.stewart				
ulk Change Report				Template
ItemBulkChangeReport_20190617152955.txt			(None)	
Investment Set			(None) Bulk Change Template 1717120 (QA-YODA 6.3) Children's Desk (cheryl stewart) Joan Alden template (cheryl stewart) Joan Alden template (cheryl stewart) Joan Alden template (cheryl stewart) Strange Tales Children's Display (cheryl stewart) Strange Tales Children's Display (cheryl stewart) Strange Tales Children's Display (cheryl stewart)	
Owning Branch		Shelf Location		template xxx yyy zzz (QA-YODA 6.3)
(No change)	•	(No change)		L
Assigned Branch		Home Branch		
(No change)	v	(No change)		v
Collection		Temporary Location		

Leap also has a new **Item Bulk Change Template** workform to modify, copy, and delete item bulk change templates.

tem Bulk Change Template 🚯					ACTIONS -	CREFRESH	RESULTS	CLOSE	
me			Ow	Owner					
Joan Aiden template				cheryl.stewart •					
Location 🕜 Call Number 📮 Blocks and	d Notes 🏾 🚯 1	liscellaneous							
Owning Branch		Shelf Location							
Test Branch 19 (Library 6) (br)	¥	(No change)		٣					
Assigned Branch		Home Branch							
(No change)		(No change)		Ŧ					
Collection		Temporary Location							

Undelete Record Sets

Sometimes a record set is deleted by accident, and this can be a difficult situation to rectify if the user who deleted the set was not the creator.

You can now undelete record sets if this feature has been enabled by the system administrator. Record sets now have a status of Final or Deleted. If the status of the record set is Deleted, then staff could use the Undelete action similar to the item record delete/undelete function.

This functionality can be accomplished in both Leap and the Staff Client.

The following sections provide more information about enabling, configuring, and using the Undelete Record Set function:

System Administration

- System Administration Options to Retain Deleted Record Sets
- Delete Record Sets Permissions Updated
- Record Set Status
- Record Set Undelete Transactions

Staff Client

- Record Set Status in Record Set Header and Properties
- <u>Undelete Menu Option and Icon for Record Sets</u>
- Find Tool Updated for Deleted Record Sets
- <u>Record Set Status in Find Tool Search Results</u>

Leap

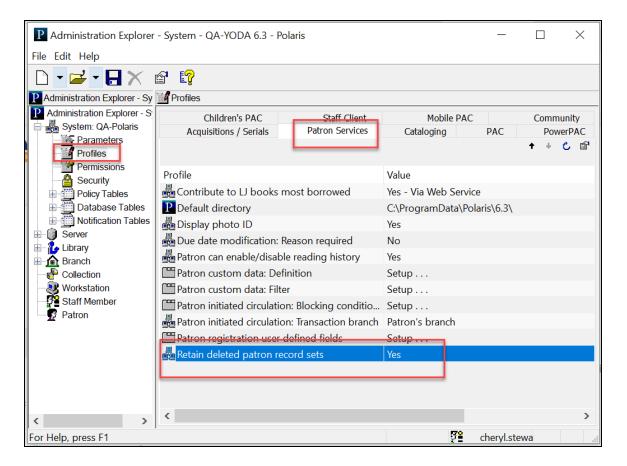
- Record Set Status in Record Set Header and Info Properties in Leap
- Undelete Menu Option for Record Sets in Leap

- Find Tool Updated for Deleted Record Sets in Leap
- Record Set Status in Find Tool Search Results

System Administration Options to Retain Deleted Record Sets

Deleted record sets must be retained to enable the Undelete Record Sets option. These are system level settings.

To retain Patron record sets, go to Administration Explorer > Profiles > Patron Services > Retain deleted patron record sets. Select Yes.



To retain Cataloging record sets, go to Administration Explorer > Profiles > Cataloging > Retain deleted cataloging record sets. Select Yes.

	- System - QA-YODA 6.3 - Polaris		_		×
File Edit Help					
🗋 🔹 🚅 🖬 🦰 🗶 🛛					
P Administration Explorer - Sy	Profiles				
P Administration Explorer - S System: QA-Polaris	Children's PAC Staff Client Mob Acquisitions / Serials Patron Services Cataloging	ile PAC g	PAC	Comm Pow	unity verPAC と 層
Profiles	Profile Va	alue		т •	
Policy Tables	tem records: Warning for items saved with modified ba N	0			
Database Tables Motification Tables	 Item records: Warning for items saved without barcodes Item records: Warning if changing assigned or home br 				
 Image: Image: Im	MARC validation immediately after bib replace MARC validation: Authority Se	o etup			
Collection	tut .	etup 00			
Staff Member	Remote automatic authority control Se	etup			
<u></u>	Retain deleted authority records Ye				
	Retain deleted cataloging record sets Ye	_			
		etup			
< >>	<				>
For Help, press F1		2° (cheryl.stev	wa	

Delete Record Sets Permissions Updated

Cataloging and patron record sets permissions are updated to support the ability to permission the undelete of record sets that have been marked for deletion.

dministration Explorer - System System: QA-Polaris Parameters Profiles Permissions	Is Permitted To			
	Control Record	Permission	Subsystem	
Database Tables	Campaigns	Access	Cataloging	
Notification Tables	Campaigns	Create	Cataloging	
	Campaigns	Delete	Cataloging	
Server	Campaigns	Modify	Cataloging	
Je Library	Cataloging record sets	Access	Cataloging	
Branch	Cataloging record sets	Create	Cataloging	
Collection	Cataloging record sets	Delete/Undelete	Cataloging	
Workstation	Cataloging record sets	Modify	Cataloging	
Staff Member	Check in shelf-ready materials	Allow	Acquisitions	
- 🚰 cheryl.stewart	Circulation check-in workform	Access Bulk mode	Circulation	
Profiles	Circulation check-in workform	Access In-house	Circulation	
Preferences	Circulation check-in workform	Access Inventor	Circulation	
Permissions	<			
Patron				

Cataloging Record Sets: Delete permission now includes /Undelete

• Patron Record Sets: Delete permission now includes /Undelete

Security Policy Tables Database Tables Notification Tables Server Library Branch Collection Workstation Staff Member Preferences Preferences Preferences Permissions	Control Record	Permission	Subsystem
	Override renewal limit blocks	Allow	Circulation
	Override request blocks	Allow	Circulation
	Override request limits	Allow	Circulation
	Patron claims: Reset total claim count	Allow	Circulation
	Patron record sets	Access	Circulation
	Patron record sets	Create	Circulation
	Patron record sets	Delete/Undelete	Circulation
	Patron registration	Modity	Circulation
	Patron registration	Access	Circulation
	Patron registration	Create	Circulation
	Patron registration	Create express r	Circulation
	C	Delete	Circulation

Record Set Status

To support the ability to undelete a record set, record sets now have a status that is stored as an additional column in the Record Sets table.

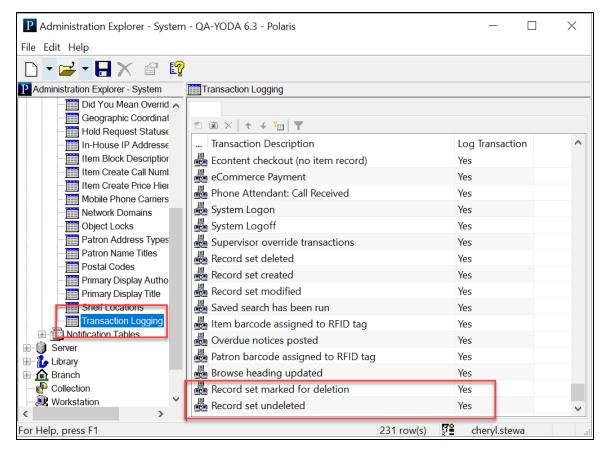
Record sets have a status of 1 = **Final** or 4 = **Deleted**.

Record Set Undelete Transactions

To support the ability to track deleted or undeleted record sets, two new types of transactions are now available in the Transaction Logging database table:

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- Record set marked for deletion
- Record set undeleted



The following subtype data are included:

- 50 Type of Record
- 168 Record set RecordID
- 192 Record set owner
- 193 Record set name

Record Set Status in Record Set Header and Properties in Staff Client

Record set status is now in the Record Set Header on Record Set Workforms for Authority, Bibliographic, Item, and Patron record sets. Record sets can have a status of Final or Deleted.

📕 Reco	rd Set 848	59 - Polaris	- 🗆 X
File Edit	View To	ols Help	
🗋 🚄	- 🔒 🖨	- X 🕅 👭 📲 🗗 🕼	
Set	Name:	Serafina Owner: cheryl.stewart	Record type: Bibliographic
	Note:	Test Record Set Number of records: 2	Record status: Final
ord			Q ₩ = ≥ ≤ < 2 ₩.
Bibliographic Record		Author Format Linke Holds Public Call Number id the Black Cloak [electronic reso Beatty, Robert Eaudio 9 * 2015 id the Black Cloak [electronic reso Beatty, Robert Ebook 6 * 2015	r Control N Status 1294816 Final 1328157 Final
	<		>
The record	d set was	aved successfully.	2 of 2 record(s) retrieved

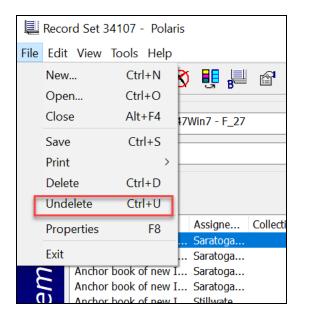
Record set status is also now in Record Set Properties.

Record Set Properties		\times
General About		
Creator: Creation date: Modification date: Record status:		
	Close	

Undelete Menu Option and Icon for Record Sets

An Undelete menu option and icon are now available for all four record set types: Patron, Item, Bibliographic, and Authority.

The Undelete Menu option is on the File menu directly below the Delete option. The keyboard control for this option is **Ctrl+ U**.



The Undelete icon is to the right of the Delete icon on the Record Set Workform.

Record Set 34107 - Polaris							
File Edit	t View To	ols Help					
	- 🔒 🖨	- X 🕅	<mark>€</mark> ₿	f	[]		
iet	Name:	Retest47947W	'in7 - F_27				
U)	Note:						
prd							

The Undelete option is only enabled if the record set's status is Deleted.

Find Tool Updated for Deleted Record Sets

The Find Tool in the Staff Client has been updated so that deleted record sets are excluded from search results unless you search by Record Status or Record Set ID.

Record Status has been added to both the Cataloging Record Sets and the Patron Services Record Sets Find Tools as access points for searches by Record Status:

Catalogi	ng Record Sets - Record status Find	Tool	_	
File Edit To	ools Options Help			
General Se	ttings Scoping Branches Collections	Databases		
Object:	Record Sets	 Limit by: (None) 	Search Mode	Search
	Record status	 Value: 	Normal Power	Stop
Type:	Exact match (implicitly truncated)	~	OSQL	New Search
Sort by:	(None)	v	Count Only	Clear
For:		×		Help
For Help, pre	ss F1	Stay on Select		

🖹 Patron Services Record Sets - Record status Find Tool —					
File Edit To	ools Options Help				
General Set	ttings				
Object:	Record Sets	✓ Limit by: (None)	Search Mode	Search	
Search by:	Record status	Value:	Normal Power	Stop	
Type:	Exact match (implicitly truncated)	×	⊖ sql	New Search	
Sort by:	(None)	\checkmark	Count Only	Clear	
For:		~		Help	
For Help, pres	ss F1	Stay on Select			

The following access points in the Find Tool have been updated to exclude record sets with the status of Deleted from these search results:

- Creation Date
- Name
- Owner

Record Set Status in Find Tool Search Results

Record set status is now available in data returned in the Find Tool search results.

	g Record Sets - Record status Find T ools Options Help	ool					-	
Object: Search by:	ttings Scoping Branches Collections Record Sets Record status Exact match (implicitly truncated) deleted	Databases Limit by: (None) Value: Value: Value: Value: Value:	Search Mod Oromal Orower Squt Count Onl					Search Stop New Search Clear Help
Name		Record Type	Owner	Total Records	Creation Date	Note	Recor	d Status
Audio 13		Item Record	Mohawk Valley Library		6/16/2005		Delete	ed
Elaine's self-	-instruction esl - no kits	Bibliographic Record	Southern Adirondack	21	11/1/2005	For Polly to link to web site	Delete	ed
New or ove	rlayed subject authorities from LTI	Authority Record	Saratoga Springs Publi	81564	10/21/2007	New or overlayed subject authorities from LTI - May	Delete	ed
Retest4794	7Win7 - F_27	Item Record	QA-YODA 6.3	866	5/29/2012	l	Delete	ed

Record Set Status in Record Set Header and Info Properties in Leap

Record set status is now in the Record Set Header on Record Set Workforms for Authority, Bibliographic, Item, and Patron record sets. Record sets can have a status of Final or Deleted.

Bibliographic Record Set 1	SAVE ACTIONS - C REFRESH	
Name	Owner	Record Set ID
Serafina	cheryl.stewart	• 84869 Record Count
	Final	2

Record set status is also now in Record Set Properties.

phic	Record Set 1	
	RECORD SET PROPERTIES	
	RECORD SET ID: 84869	
	STATUS: FINAL	
	NAME: SERAFINA	
	CREATOR: CHERYL.STEWART	
arcode	CREATION DATE: 3/6/2019 2:55:01 PM	
	MODIFIER: CHERYL.STEWART	ORI
I the Blac	MODIFICATION DATE: 3/6/2019 3:12:43 PM	audi

Undelete Menu Option for Record Sets in Leap

An Undelete menu option is now in the header level **ACTIONS** button on all four record set types: Patron, Item, Bibliographic, and Authority.

The Undelete option is only enabled if the record set's status is Deleted.

Bibliographic Record Set 1	SAVE		C' REFRESH	F	RESUL
Name	Owner	IN Create Item			Reco
Elaine's self-instruction esl - no kits	Southern Ad		ority Record Set	Ŧ	120
Note	Record Status	Delete			Reco
For Polly to link to web site	Deleted	♦ Undelete			21

Find Tool Updated for Deleted Record Sets in Leap

The Find Tool in Leap has been updated so that deleted record sets are excluded from search results unless you search by Record Status or Record Set ID.

Record Status has been added to the Find Tool as an access point for searches by Record Status:

Find Tool - Record Set	×
Record Set Basic Search Record status Exact	
(none)	✓ ☆ T Q =
Record status	
Deleted	Re <mark>c</mark> o
Final	
4	
Ready	
Count Only	OPEN CANCEL

The following access points in the Find Tool have been updated to exclude record sets with the status of Deleted from these search results:

- Creation Date
- Name
- Owner
- Type

Record Set Status in Find Tool Search Results in Leap

Record set status is now available in data returned in the Find Tool search results in Leap.

A column called Record Status is now listed under Column Settings in the Find Tool. This column is unselected by default.

Find Tool - Record Set		×			
Column Settings					
✓ Name	Display Position	7			
Record Type	Folded	False			
 Owner 	Name	Record Status			
✓ Total Records	Pinned	False			
✓ Creation Date	Visible	True			
✓ Note	Width	10			
Record Status	Direley Desition				
MOVE UP MOVE DOWN	Display Position The order of the column in the display.				
		SAVE CANCEL			

Once selected, the column can be pinned and manipulated like all the other columns under Column Settings.

Find Tool - Record Set						×
Record Set > Basic Search >	Record set ID > E	Exact 🕨				
84728						x ☆ ▼ Q ≡
[≭] Name	Record Type	Owner	Total Records	Creation Date	Note	Record Status
Nest for Celeste	Bibliographic R	cheryl.stewart	2	2/25/2019	Test record	Final
Ready						1 result(s)
Count Only					OPEN	CANCEL

Call Number and Volume on Hold and Almost Overdue Notices

The item call number and volume are now included on Hold Notices and Almost Overdue Reminders.

Both are added to each of the following notices after the Format column:

- Holds Full-page mailer
- Holds Half-page mailer
- Holds Half-page mailer dot matrix
- Holds Z-fold mailer
- Holds Z-fold oversize
- Email Almost Overdue
- Email Almost Overdue Other Items
- Email Reminder Almost Overdue
- Email Request

Circ Stats Added to Item View

The **(YTD) circulation (circ) count** and **lifetime circ count** stats are now displayed in the Item Level view in the Bibliographic Records Preview window.

To view these stats:

1. From the Bibliographic Records Find Tool, right-click on a bibliographic record, and select **Preview**.

Bibliographic Records - Title Find Tool							x		
File Edit Tools Options Help									
General Settings Scoping Branches Collections	s Databases	-							
General Settings Scoping Branches Collections	s Databases							Sear	-h
Object: Bibliographic Records	✓ Limit by:	(None))			¥ (Search Mode	Joan	
Search by: Title	Value:						Normal	Stop	o
Search by: Title	value:						O Power	New Se	arah
Type: Exact match (implicitly truncated)	~						⊖ sql	New Se	arch
Sort by: (None)	~					Г	Count Only	Clea	ar 🛛
, , , , , , , , , , , , , , , , , , , ,						_			
For: dogs	~							Help	0
]	
Title	Author		Format	Lin	Ho	Publ	Call Number	Contr	
The dogs : a novel	Calder, Rol	oert.	Book	2	1	1976	Fict Cal	4136	
Dogs & dragons, trees & dreams : a collection			Book	5	3	1980	J 811 K	8554	
Dogsled : a true tale of the North				-	0	1976	917.98 Ran	10966	
The dogs of Dewsbury	Open				0	1976	821 A82d	17068	≡
Dogs, breeding & showing.	Place	Hold.			0	1983	636.7 S	21805	
Dogs.	Previe	w			0	1983	636.7 P	23751	
A Dog's life : poems	Print	_		•	0	1983	J 811 Dog	26313	
Dogsong.	Add t	o Record	d Set	•	0	1985	Fict Pau YA	29012	
Dogs, dogs, dogs : a collection of great dog ca	Create			•	0	1985	741.5973 Dog	33578	
Dogs, all about them		=			0	1986	J 636.7 Sil	35127	
A dog's body	Links				0	1986	J 599.744 Col	35602	
Dogs, dreams, and men	Delete	2			0	1988	Fict Kau	49831	
Dogs, dogs, dogs : the best of Beryl Chapple's	Unde	ete			0	1984	636.7 Cha	51866	
The dogs bark : public people and private plac	Prope	rties			0	1973	818 C	56532	\sim
Dear relection care training					0	1071	626 7 Pag VA	57/07	
Done				Stay or	n Select	28 (of 417 record(s)	retrieved	Use 🔡

2. The Preview window opens. The (YTD) circulation (circ) count and lifetime circ

count stats are displayed in the Item Level view.

P	QA	-POLARIS - Polaris	Database (Bibl	iographic Reco	ord 10966)		_ □	x
LCCN:	76022211 /AC							
ISBN:	0876911866 :\$7.95					1	Jisplay In PAC	:
Other Control No:	AAX-0512							
Author:	Randles, Slim.							
Title:	Dogsled : a true tale	of the North / Slim Randles						
Imprint :	New York : Winches	er Press, c1976.						
Description:	209 p.; 22 cm.							
Summary:	A reporter recounts a	dventures of his adopted lif	e in Alaska and part	icularly his grueling o	dog team expeditions.			
Total number of active holds:	0	Grand T	otal Circulation (lifetime) : 19		Popularity: Low	,	٦
Branch Name	No. of Items	Circ YTD	Circ Prev YTD	Circ Lifetime	In-house YTD	In-house Prev YTD	In-house Lifetime	
tals:	4	0	0	19	0	0	0	
.gyle Free Library (ARG)	1	0	0	5	0	0	0	
Bancroft Public Library (Salem) (SLM)	1	0	0	2	0	0	0	
Pember Library and Museum (Granville) (GRA)	1	0	0	1	0	0	0	
Schenectady Branch - Central (SCP)	1	0	0	11	0	0	0	
Title Assigned Bra Col	lection Material	Shelf Lo Call Number	V Status	Barcode	Last Activit R Co	ontrol N YTD Circ Count	Lifetime Circ Count	Г
Dogsled : a true tale o Argyle Free L Adu		917.98 Ran	In	0002600073296	10/23/2007 F 17		5	Г
Dogsled : a true tale o Bancroft Publ Adu		917.98 Ran	Withd	0002200083398	4/1/2005 F 16	93097 0	2	L
Dogsled : a true tale o Pember Libra Adu		917.98 Ran		0003200169799	-11	0 0	1	L
Dogsled : a true tale o Schenectady Adu	ult Non Book	Storage 979.8 R 19	Withd	0000400765061	7/20/2000 F 31	3955 0	11	

New Total Holds Thresholds Include Inactive Setting

In previous versions of Polaris, inactive hold requests counted toward a patron's total number of allowed hold requests. As of Polaris version 6.2, a new system-level **Total holds thresholds include Inactive** setting lets you specify whether inactive hold requests count toward a patron's total holds limit.

The new system-level **Total holds thresholds include Inactive** setting is now available on the **Terms** tab of the **Hold options** window. This window is accessible in the Administration Explorer by selecting **Parameters** > **Request**.

Hold options						×
Requests Charges Preferred	Pickup Staff clien	t & PAC Terms	RTF	Queue		
	Days					
Number days held for pickup:	3		Und	aimed request	he •	
Default expiration period:	10			 Delete 		
** Delete expired in:	35			Cancel		
** Delete cancelled in:	35					
** Delete not-supplied in:	35	** 🗸	Total holds	s thresholds in	clude Held/Sł	hipped
		** 🗌	Total holds	s thresholds in	clude Inactiv	e
** System level only						
		OK	С	ancel	Apply	Help

When the Total holds thresholds include Inactive check box is:

- Selected Inactive hold requests count toward a patron's total holds limit. This is the default setting.
- Not selected Inactive hold requests do not count toward a patron's total holds limit.

New Patron Gender Options

New patron gender options now allow flexibility in how you track or don't track gender.

Gender Drop Down Menus

Patron registration workforms in the Staff Client, Leap, PowerPAC, and MobilePAC now include Gender selection drop down menus.

All drop down menus start with a **(None)** option followed by a list of genders specified for the specific organization. The (None) option is selected by default unless a patron has already selected a gender. Selecting (None) sets the patron's gender to "null" in the database as if they have opted out of a gender selection.

2			Pat	ron Registra	tion - 35	57715 - Ge	eneral	- Polaris
File Ec	lit View Links	Tools Help	D					
	¥ 🔒 🗧	• · ×	I 🍒	***	¢	: ?		
ис	Barcode:	A12291954				Registere	ed at:	Community Library (COB)
ťic	Last name:	Izquierda				Patron	code:	Retired V
a	First name:	Laura						Instructor
sti	Middle name:						Expir	ation:
Registration	Title:	~	Suffix:				Ter	rm: 0 ↔ ✓ Date: 11/15/2022 🗐 ▼
Se	General							
	Gender:		Female			¥	1	User defined fields
<u> (</u>	Statistical class		(None) N/A					ID Number
C	Password:		Female Male					4
運	Language:		English	×			1	Privileges / Restrictions
<u>.</u>	Former barcod	e:	131335456456					4
	Birth date:		12/ 1/1955					Voter Registration
1	Date of original	l registration:	11/15/2018					Yes
	Last activity da	ite:	6/18/2019 10:57:	22 AM				CybraryN Use Only (XXX,YYY)
	Exclude from no	tices and remine	ders:	Exclude f	from collect	ion agency		
	Overdue	Almost overd	ue/auto-renew	✓ Maintain				Not Currently in Use
	Hold	Patron record	expiration		-			
	Billing	Inactive patro	00	E-mail no				4
		_ mocove paul		Do not de	elete patro	n record		
For Help,	press F1							

eap Scan or s	earch Q FIND	
LAURA IZQL A12291954 COMMUNIT		
▲ Check Out (0) iiN Ou	tt (0) / Overdue (0) 🗟 Account (\$25.00) 😳 Claims (2) / Lost (0) 🍽 Holds (12) / Held (0) 👔 ILL (0) /	Held (0) 🔊 Reading History 💄 Asso
1 Profile	Profile	
L+ Attributes		
🖂 Email	Barcode *	Registered At *
Address	A12291954	Community Library
Phone/Fax	Former Barcode	Patron Code *
A Notifications	131335456456	Retired
08 Preferences	Last Name *	Date of Registration
🖬 Image	Izquierda	11/15/2018
O Misc. Info	124UIUUU	11/13/2010
	First Name *	Expiration Date *
	Laura	11/15/2022
	Middle Name	Birth Date
		12/1/1955
	Title Suffix	Statistical Class
	T	Cobleskill-Town
	Gender *	
		•
	(None) N/A	
	Female	
	Male	_
	Attributes	
	ID Number *	Privileges / Restrictions *
	4	4

Manage Genders

A Genders Database table is available at the system, library, and branch levels. Changes to the table modifies it for all users. Select **Database Tables** > **Genders**.

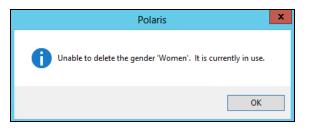
P Admi	inistration Explorer - System - QA-YODA 6.3 - Polaris	- - X
File Edit Help		
P Administration Explorer - System	Genders	
Administration Explorer - System Administration Explorer - System Parameters Profiles Profiles Permissions Security Policy Tables Adminity Deduplication Administratives Computype Label Printer C Bibliographic Coordinates Hold Request Statuses In -House IP Addresses In them Block Descriptions Item Create Price Hierarch Mobile Phone Carriers Network Domains Concert Locks		
]
For Help, press F1	9 row(s) 🚰 o	cheryl.stewa

Entries can be added/modified/deleted.

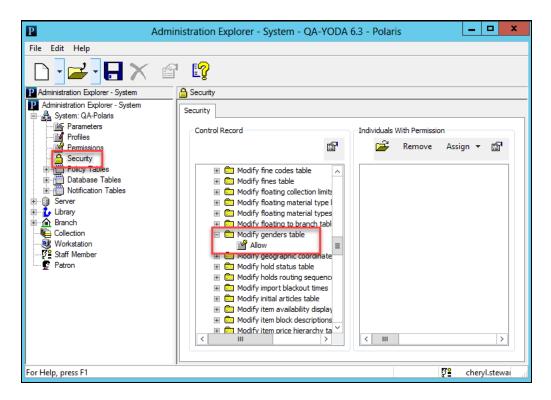
• A message is presented for changes that affect all libraries.



• Database integrity is enforced on the deletion, not allowing a user to delete a row that is in use by a patron with the following message presented.



Editing the Genders Table requires a new permission. Select **Security** > **System Administration** > **Modify genders table: Allow**. This permission is granted at the Staff Member, Workstation, and Permission Group levels. It is not granted by default.



You can also manage gender displays. These can be managed at the system, library, and branch levels. Select **Parameters > Patron Services > Patron Registration Filter genders**.

Р	Administration Explorer - System - QA-YODA 6.3 - Polari	s	_ D X	
File Edit Help				
D - 🚅 - 日 🗙	í 🗗 🔽			
P Administration Explorer - System	Parameters			
ia∎ Library i∄∎.Adjacent Test Library		Card Payment	NCIP	
🖽 🖷 🤁 Amsterdam	Acquisitions / Serials Patron Services Catalogi	ng PAC	Notification	
🖭 🦆 Argyle		+	+ C 🖻	
🗄 🥻 Ballston Spa				
i⊞… i Bolton i≣… i Brant Lake	Parameter	Value	^	
Parameters	Outreach title rating enabled	Yes 20 Yes Setup		
	Overdues: # of days until long overdue			
Permissions	💑 Overdues: Block for long overdue items			
- A Security	— Overnight Ioan period			
	🔒 Patron Account: Charge Alert Threshold	\$999.00		
🗄 🔠 Database Tables	Patron delete options	Setup		
🗉 🦆 Burnt Hills	Patron message text: Configure	Setup		
🗄 🗠 🚺 Cambridge	Patron message text: Expiration period	14 day(s)		
🗄 🥻 Canajoharie	Patron registration options	Setup		
⊞… 🚺 Chestertown ⊞… 🚺 Clifton Park	Patron Registration: Filter genders	Setup		
	Patron registration: Filter patron codes	Setup	_	
	P Quick-circ: Material type	Book	=	
	Reading history	Setup		
🖽 🔁 Fonda	Registration fee options	Setup	~	
🖅 🦆 Fort Edward		<u></u>	>	
Fort Hunter		170	alson distant	
For Help, press F1		2°	cheryl.stewa	

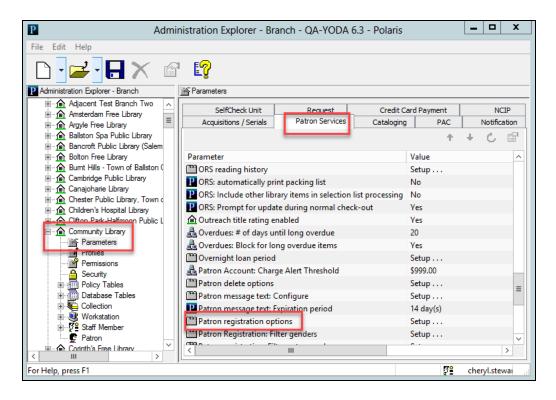
You can select the gender options to display and change the order in which they are displayed.

	Patron registration: Filter genders	X
Current organization: 🛕 Settings defined at: 🛔	Community Library (br) QA-YODA 6.3 (sys) Jlay on the patron registration form:	
 ✓ N/A ✓ Female ✓ Male Bi-Gendered Cross Dresser Transgender 		Select All Unselect All
Trans Person Man Woman		Up Down
Save	Cancel Revert Help	

Gender Suppression

You now have the ability to suppress the Gender question when registering and opening patron records. When suppressed, the Gender question will not be visible on patron workforms, and gender is not tracked. Suppression is based on the patron's registered branch.

To suppress Gender tracking in the Staff Client and Leap, select **Branch > Parameters > Patron Services > Patron registration options**.



Select **Display Options**. When Gender is checked, it is suppressed.

Patron registration optic	ons ×
General defaults Data Field Defaults Display Options	
Required field options	
Address	
Birth date	
Gender	
Password	
Statistical dass	
Fields to suppress	
Save Cancel	Apply Help

To suppress Gender in Self-registration, select **Branch** > **Profiles** > **PAC** > **Patron access options**.

P Admin	nistration Explorer - Br	anch - QA-YODA 6	.3 - Polaris	_	. 🗆	x
File Edit Help						
	- E2					
P Administration Explorer - Branch	Profiles					
Adjacent Test Branch Two Adjacent Test Branch Two Amsterdam Free Library Argyle Free Library Argyle Free Library Amsterdam Spa Public Library	Children's PAC Acquisitions / Serials	Staff Client Patron Services	Mobile PAC Cataloging	PAC	Communit PowerP	-
E Bancroft Public Library (Salem Bolton Free Library	Profile		Value			^
E → Bumt Hills - Town of Ballston (Cambridge Public Library	P Item availability: Disp 🏯 Item availability: Disp		tem status Yes Yes			
⊞… के Canajoharie Library ⊞… के Chester Public Library, Town c	P Item availability: Disp	-	Yes			
⊞ <u>∩</u> Children's Hospital Library ⊞ <u>∩</u> Clifton Park-Halfmoon Public L	ltem availability: Disp	2.21	105			
Community Libra y	Multiple language str	-	Setup			
Profiles	Patron access options		Setup n No	•		=
Permissions	P Patron access: Policy	•				
Policy Tables	Patron access: Policy	statement hyper text linl	k permitted No			
Database Tables	Patron access: Renew	al	Setup			
	Patron eReceipts		Setup			
⊞	뤒 Patron library assigne	d and free text block def	ault text Library a	assigned blo	ck	
Patron	Patrons can remove r	eading history	Yes			~
→ A Coninth's Free Library ✓	<	ш			1	>
For Help, press F1				ch	neryl.stew	iai j

Select **Self-registration**. Gender is suppressed when **Suppress gender selection** is checked.

Patron Access	Options [Community Library (br)]	x
Self-registration Defaults Log In	Contact Info Preferences Ask us	
Patron can self-register		
E-mail to:	Add Delete	
Name	Branch	
Cobleskill Patron Update	Community Library	
Self-registration warning message	anablad	
	Acknowledgement, and COPPA	
messages are defined on the Di	fultiple language strings").	
dialog box (bodble-click in	iurupie ianguage surings).	
UDF Display Custom Field Display		
User defined fields to display		
	Required	
Privileges / Restrictions		
Voter Registration	Required	
CybraryN Use Only (XXX,YYY)	Required	
Not Currently in Use	Required	
Birth date required		
Suppress gender selection		
	Save Cancel Apply Help	

Gender No Longer Copied During Copy Patron Operation

Copying a patron record will not copy over the gender but should use the same suppression rules unless/until the patron's registered branch changes.

Important Notes About Staff Client Offline Registration and Automated Offline Upload

• While uploading offline transactions, specifically offline patron registration, using Bookmobile or Automated Offline, the upload process will try to convert the existing single character gender (N, F, M) to the new GenderID values.

- The new GenderID mappings are allowed to be deleted, but if the library plans to do so, then they MUST keep them until ALL offline transaction files created on releases older than 6.3 are uploaded.
- Once the library starts doing offline circulation on a 6.3 or newer staff client, they can remove the default gender entries if they choose to do so, but they will not be able to maintain a gender when uploading transactions from a previous release.

Important Notes about INN-Reach

The gender in the virtual patron record is set from the gender in the institutional patron template. If the registered branch of the virtual patron is not set to display the gender in the template, the gender of the virtual patron will be set to (None). The INN-Reach gender applied to the institutional patron template should be a gender that is available at all branches.

Important Notes about SimplyReports

Any saved reports that used the Gender field will now be broken. To fix these:

- 1. Open the report for editing.
- 2. Verify your Gender selection is still valid.
- 3. Save the report.

Suspend and Resume Outgoing Circulation API Messages for INN-Reach

Suspend and Resume buttons were added to the Current Queue Status section of the Status and Statistics page in Polaris INN-Reach Administration. These buttons provide the ability to suspend and resume outgoing circulation API messages. You must have the INN-Reach Modify user permission to use this feature. Otherwise, the Action column and the buttons do not appear.

Polaris to INN-Reach Home Status - Log Files - Diagnostics	Ť	
Status and Statistics The INN-Reach statistical data listed below applies to this local Polaris site. Local Server Status		
Good news! Local system is configured and running.		
Current Queue Status		
Queue Status Count Action		
Record contribution queue size 0		
Circulation message queue size 0 Suspend		
Record Contribution Statistics		
Action 1 hour 24 hours 7	7 days 30 days	Lifetime
Bibliographic records contributed to INN-Reach 0 0 0	D 1	18469
Bibliographic records updated 0 1 7	7 17	76
Item records contributed to INN-Reach 0 0 0	0 1	22210
Item records updated 0 2 5	5 10	71

When you select the Suspend button, the Resume button appears.

Additional Item Columns Added to Request Manager

You can now view Item Agency and Item Location information directly in the Request Manager. This ability is available in both the Staff Client and Leap. This information was previously only visible by opening each request and viewing the Notes field. The function of the Notes field remains unchanged; information will still display in the Notes field.

Customers must be licensed for INN-Reach in order to view the new columns. Customers who don't use INN-Reach will not see the additional columns.

	Request Manager - ILL Requests							
File V	/iew Tools Help	5						
4	a - C	E?						
Manager	Branch name:	Community Library	(COB)		V By: Pickup	∨ Sta	tus: Shipped	*
nai	Requests							
a	Date	Author	Title	Item Agency	Item Location	Format	Patron Name	Shipped Dati
Σ	6/18/2019	Watson, Nanc	The birthday goat	plagc	DML 3rd Floor Books	Sound R	InnReach, Siste	6/18/2019
4	6/18/2019	James, Henry,		plagd	Pitkin Non-Print Colle	Book	InnReach, Loga	6/18/2019
S.	6/18/2019	Underwood, M	Double jeopardy [plagd	Norlin LibraryStacks	Book	InnReach, Loga	6/18/2019
e	6/18/2019	Williams, Ursul	The Three toymaker	plagg	Corinth's Free Library	Book	InnReach, Loga	6/18/2019
Request	6/18/2019	Williams, Vera B.	The great watermel	plagc	Broomfield MDE Non	Book	InnReach, Siste	6/18/2019
1								
MAR								
	<							>
For Help	o, press F1				Number: 5	RTF: Jur	21 2019 5:00AM	NUM

Staff Client View

Leap View

Bran	ch Commun	ity Library (COB)	v S	tatus Shipped	• By Pickup	¥		
Ho	lds 📑 ILL	INN-Reach						
₿	Export -@1						Filter ILLs	
Fotal	items 5 total							
	DATE	AUTHOR	TITLE	ITEM AGENCY	ITEM LOCATION	FORMAT	PATRON NAME	SHIPPED DATE
6	6/18/2019	Watson, Nancy Dingman.	The birthday goat. Pictures by Wendy Watson.	plagc	DML 3rd Floor Books	Sound Recording	InnReach, SisterYoda CommunityY-MVLS	6/18/2019
	6/18/2019	James, Henry, 1843-1916.	The turn of the screw [large print] / Henry James.	plagd	Pitkin Non-Print Collection C576	Book	InnReach, Logan Community Yoda-MVLS	6/18/2019
	6/18/2019	Underwood, Michael, 1916-	Double jeopardy [large print] / Michael Underwood.	plagd	Norlin LibraryStacks	Book	InnReach, Logan Community Yoda-MVLS	6/18/2019
	6/18/2019	Williams, Ursula Moray, 1911-	The Three toymakers / Illustrated by Shirley Hughes.	plagg	Corinth's Free Library	Book	InnReach, Logan Community Yoda-MVLS	6/18/2019
		Williams, Vera B.	The great watermelon birthday / Vera B.	plage	Broomfield MDE	Book	InnReach, SisterYoda	6/18/2019

Support for JetPay E-commerce in Polaris PowerPAC

You can now use the JetPay gateway to accept credit card payments from Polaris PowerPAC. JetPay is a hosted method of accepting credit card payments from PowerPAC. You can enable the use of JetPay at the system, library, or branch level.

When you use JetPay for payments, JetPay handles much of the responsibility of Payment Card Industry Data Security Standard (PCI DSS) compliance for your library. No credit card information is stored in the Polaris database when a payment is made via JetPay.

Note:

The use of JetPay for payments from the staff client, Polaris ExpressCheck, or Mobile PAC is not supported.

To enable JetPay e-commerce, you must:

- 1. <u>Set up a JetPay account</u>
- 2. Set up JetPay processing in the Administration Explorer

Set Up a JetPay Account

To enable the use of JetPay for accepting credit card payments from Polaris PowerPAC, <u>contact JetPay</u> to establish an account for your library.

When establishing your library's JetPay account, make a note of the following two pieces of information:

- Client key
- Web key

You will need this information to <u>set up JetPay processing in the Administration</u> Explorer.

Set Up JetPay Processing in the Administration Explorer

To configure Polaris to use JetPay for processing credit card payments from PowerPAC:

- 1. In the Administration Explorer tree view, navigate to the organization for which you want to enable JetPay processing, and click **Parameters** > **Credit Card Payment**.
- 2. Double-click Online Payments: Configure.

The Online Payments Settings dialog box opens.

Online Payment Sett	ings				×
Payment processing	gateway				
JetPay			~	Properties	
PowerPAC Staff Cli	ant / Lean	ExpressCheck	Mahila DAC		
Allow online payr		Expressorieux	MODILE FAC		
Minimur	n fine (\$):	\$1.00			
Process	ing fee (\$);	\$0.00			
Sen	d email recei	ipt			
Disp	lay privacy p	policy			
Disp	lay refund p	olicy			
Allow donations					
Process	ing fee (\$);	\$0.00			
Allo	w patron to	designate title pi	urchase		
ОК		Cancel	He	lp	

- 3. In the **Payment processing gateway** list, select **JetPay**.
- 4. Click **Properties**.

The JetPay dialog box appears.

JetPay			×
Connection			
Transaction URL:			
Payment page URL:			
Transaction fee URL:			
Client key:			
Web key:			
Post-back URL:			
PAC return URL:			
Donations PAC return URL:			
Library absorbs fees:			
	OK	Cancel	Help

- 5. Enter the following connection information:
 - a. Transaction URL Enter the following URL:

https://magic.collectorsolutions.com/magic-api/api/transaction/redirect

b. Payment page URL - Enter the following URL:

https://magic.collectorsolutions.com/magic-ui/PaymentRedirect

c. Transaction fee URL - Enter the following URL:

https://magic.collectorsolutions.com/magic-api/api/fee

- d. Client key Enter the client key provided when your library <u>set up a JetPay</u> <u>account</u>.
- e. Web key Enter the web key provided when your library <u>set up a JetPay</u> <u>account</u>.
- f. Post-back URL Enter the post-back URL for your site, using the format below:

https://<www.mylibrary.org/polaris>/payments/PostbackJetPay.aspx

Note:

Replace <www.mylibrary.org/polaris> with your Polaris PowerPAC URL.

This field accepts a maximum of 250 alphanumeric characters.

g. PAC return URL - Enter the URL that will be displayed when the user clicks the return link on the JetPay final payment transaction page. To use your lib-rary's PowerPAC patron account Fine & Fees page, use the format below:

https://<www.mylibrary.org>/polaris/patronaccount/finesfees.aspx

Note:

Replace <www.mylibrary.org/polaris> with your Polaris PowerPAC URL.

This field accepts a maximum of 250 alphanumeric characters.

- h. Donations PAC return URL If you plan to accept donations, enter the URL of the Polaris PowerPAC page that will be displayed when the user clicks the return link on the JetPay final payment transaction page. This field is required. If you do not plan to accept donations, simply enter your PAC Return URL. This field accepts a maximum of 250 alphanumeric characters.
- i. Library absorbs fees Select this check box if you want the library to absorb the JetPay credit card processing fee. This check box is a shadow setting of how your account is set up in JetPay to display warnings and fees to the patron and it must match the corresponding setting in JetPay. If this check box is not selected, the processing fee is billed to the patron.
- j. Click OK.
- 6. Configure the following settings on the **PowerPAC** tab of the Online Payments Settings dialog box:
 - a. Allow online payments Select this check box to enable the use of JetPay for credit card payment processing.

Note:

In PowerPAC, patrons pay fines on the Fines and Fees page of the patron account. Be sure the PowerPAC profile **Navigation**:

Fines & fees is set to **Yes** for the organization to allow patrons to access this page. For more information, see <u>Enable patron</u> account access - PowerPAC.

b. Minimum fine - Enter the minimum fine amount that will be accepted via credit card payment. The default value for this setting is \$1.00.

Note:

If the amount a patron owes is less than the **Minimum fine** value, the **Pay fines** link does not appear in the patron's account in Polaris PowerPAC.

- c. Processing fee -This is controlled completely by JetPay and should be set up there. To charge a processing fee for fine payments, enter an amount in the **Processing fee** box. The maximum value for this setting is \$20.00. The default value is \$0.00.
- d. Display privacy policy To display a privacy policy link in Polaris PowerPAC, select **Display privacy policy**. For more information, see <u>Privacy and Refund</u> Policy Display Options.
- e. Display refund policy To display a refund policy link in Polaris PowerPAC, select **Display refund policy**. For more information, see <u>Privacy and Refund</u> <u>Policy Display Options</u>.
- f. Allow donations Select this check box to enable the use of credit card payments for donations.
- g. Processing fee This is controlled completely by JetPay and should be set up there. To charge a processing fee for donations, enter an amount in the **Pro**cessing fee box for donation payments. The maximum value is \$20.00. The default value is \$0.00.
- Allow patron to designate title purchase Select this check box to allow the donor to direct a donation toward a title purchase in a specific subject area. When this option is selected, the donations page includes a field where the donor can specify a title purchase.
- 7. Click **OK** to save your settings.

Display Improvements in Polaris PowerPAC

Item availability information in the PowerPAC user interface has been improved to reduce horizontal scrolling. This change makes it easier for users to navigate Polaris PowerPAC using mobile devices.

Tablets will display item availability information in a table format similar to that on a PC.

Phones will display item availability information in a list.

Multilingual Support for Dashboard Titles

If your library is licensed for additional languages in the PAC, you can now view dashboard labels in a language other than English, and the labels can be customized. Previously, when a different language was selected, the dashboard labels would continue to display in English. Labels can now appear in the language the user selects if the database contains the appropriate translation.

Two dashboard types can be configured: Polaris PowerPAC dashboards and customerdefined dashboards. The following sections describe how to customize each dashboard.

Customize the Polaris PowerPAC dashboard

Each of the Polaris-defined dashboards now have a system-assigned mnemonic that can be used to edit the dashboard's default title. You can view a dashboard's mnemonic in the properties box that opens when the dashboard label is double clicked.

	Web Part Editor	x
Polaris and 3rd Party User De Web Parts: Children's Fiction Series Children's Illustrated Early and Middle Grade Ro Hardcover Fiction Hardcover Non-Fiction Make a Donation Mass Market Most Circ'd Authors		
Most Circ'd Subjects Most Circ'd Titles New Titles On Order Items Total Listing Rows 0 Save	ОК Неlp	

To change a mnemonic, edit the strings associated with that mnemonic in WebAdmin. The following table lists new mnemonics and associated values that can be used with multilingual support.

Mnemonic	Value		
PACML_DASH_CHILDFICTIONSERIES	Children's Fiction Series		
PACML_DASH_CHILDILLUSTRATED	Children's Illustrated		
PACML_DASH_DONATION	Make a Donation		
PACML_DASH_EARLYMIDDLE	Early and Middle Grade Readers		
PACML_DASH_HARDFICTION	Hardcover Fiction		
PACML_DASH_MASSMARKET	Mass Market		
PACML_DASH_MOSTCIRCAUTHORS	Most Circ'd Authors		
PACML_DASH_MOSTCIRCSUBJECTS	Most Circ'd Subjects		
PACML_DASH_MOSTCIRCTITLES	Most Circ'd Titles		
PACML_DASH_NEWTITLES	New Titles		
PACML_DASH_ONORDERITEMS	On-Order Items		
PACML_DASH_PAPERFICTION	Trade Paperback Fiction		
PACML_DASH_PAPERNONFICTION	Trade Paperback Non-Fiction		
PACML_DASH_YOUNGADULT	Young Adult		

Some dashboards are not listed. They already have mnemonics that allow them to be customized in WebAdmin. These dashboards are listed in the table below.

Mnemonic	Value
PACML_HEADER_1007	Patron Account
PACML_FEATURE_DASHHEAD	Feature It!
PACML_DASHBOARD_XSL_1551	Title Lists
PACPROF_NARROW_DASH_LABEL (multilingual SA string)	Narrow Search
PACPROF_RELATED_DASH_LABEL (multilingual SA string)	Related Searches
ACPROF_NARROW_DASH_LABEL (multilingual SA string)	Narrow Community Search

PACPROF_RELATED_DASH_LABEL (multilingual SA string)	Related Community Search
PACML_DASHBOARD_XSL_1558	Saved Searches
PACML_RVT_DASHHEAD	Previous Titles

Customize a customer-defined dashboard

You can now associate a multilingual mnemonic with user-defined dashboard labels.

When creating a new user-defined dashboard, specify a mnemonic along with a default title. Mnemonics should not contain spaces.

ত্	Web Part Editor	x				
Web Parts: Axis 360 titles	Add Web Part Title					
Best Sellers Easter Titles Help Hours Kellie's list Ms. Stacey Recomme New Graphic Titles New Popular Titles OverDrive titles Summer Holiday Picnio Summer Reading List	DASH_BACKTOSCHOOL	Add Edit Delete				
	ОК	Down Help				

• Mnemonics are optional. If multiple languages are not used in PowerPAC, a mnemonic does not need to be specified during dashboard creation. The dashboard title will only display what is entered in the dialog box "Title" field. • A mnemonic is only specified when creating a dashboard. To add a mnemonic to an existing user-defined dashboard, the old dashboard must be deleted and a new one created. When the new dashboard is created, a mnemonic can be specified.

Strings for each language are created automatically with the title specified as the default display value for the mnemonic. The title label can then be edited for each language using the mnemonic in WebAdmin.

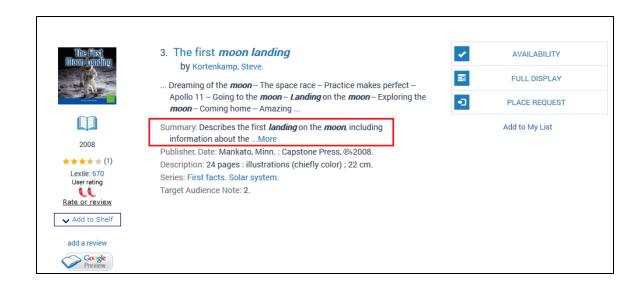
Configure the Maximum Length of the Title Summary in PowerPAC Search Results

The new PowerPAC profile **Title Display: Number of characters in the Summary (Short)** allows you to specify the maximum number of characters of the Summary (Short) field that are displayed in the brief and full search results views for a title in the Polaris PowerPAC.

P Administration Explorer - System			-	- 🗆	×
<u>F</u> ile <u>E</u> dit <u>H</u> elp					
D - 🚅 - 🗛 🗙 🖆	· E <mark>?</mark>				
P Administration Explorer - System	M Profiles				
🗐 🏠 Branch 🔨	Acquisitions / Serials Patron Services Cataloging PAC PowerPAC Chi	ldren's PAC Staff Client	Mahila DAC	Community	
	Acquisitions / Serials Patron Services Cataloging PAC PowerPAC Chi	iurens PAC <u>S</u> tan Client		Community	
Adjacent Test Branch One Adjacent Test Branch Three			†	-+ C	, 😭
Adjacent Test Branch Two Adjacent Test Branch Two	Profile	Value			^
	Remote databases: Categorization of target databases				
🗄 🚠 Argyle Free Library	Remote databases: Categorization of target databases	Setup			
⊞… 🏠 Ballston Spa Public Library	Remote databases: Usage settings				
Bancroft Public Library (Salem	Remote user PowerPAC: Enable	Setup Yes			
⊞… 🛕 Bolton Free Library ⊞… 🍙 Burnt Hills - Town of Ballston (Result set: Maximum number of records to return	100000			
		No			
	A Rotating best seller book jacket on Portal page RSS Feeds: Enable	Ves			
🗄 🏠 Chester Public Library, Town c					
⊞… <u></u> Children's Hospital Library	Scoping: Use MARC language scoping display table	Yes			
⊡… (A) Clifton Park-Halfmoon Public L	Search options: Limit by collection enabled	Yes			
Parameters	Search: Display search criteria in search box for link-produced searc				
	🙆 Single login: Enable	Yes			
Permissions	P Text: Headings count column for "see from" headings				
Security		Left			
Image: Image		Ocean			
Database Tables	Title Display: Configure	Setup			
⊞… 🟠 Corinth's Free Library ⊞… 🏠 Digital Branch	Title Display: Number of characters in the Summary (Short)	0			
E → Digital Branch Two	P Title list: Email	Yes			
	🚠 Title list: Enable	Yes			
🖅 🚠 Easton Library	▲ Title list: Enable bulk holds	Yes			
⊕ _ femeryville Test Branch	🛓 Title list: Maximum number of titles to request in bulk	10			
Fort Edward Free Library	P Title list: Print	Yes			
⊞… 🏠 Fort Hunter Free Library ⊞ 🏠 Fort Plain Free Library	P Title list: Save	Yes			~
	<				>
or Help, press F1		₿°∎ e	mily.reising		

By default, this profile is set to "0", and the number of characters displayed is not limited. You can enter a value between 0 and 4000.

When **Summary** field text exceeds the specified limit, Polaris PowerPAC displays truncated summary text followed by a **More** link. Users can click **More** to expand the display to show the entire summary, and click **Less** to collapse the display again.



Compile CSS File with Polaris Web Admin Tool

An option to compile custom CSS for custom themes has been added to the **Polaris Web Admin tool** for hosted libraries without direct access to the PowerPAC server.

The new option is found under **PAC Tools** > **Compile CSS**:

Polaris Web Admin Tool						
Lang	Language Tools PAC Tools PAPI Key Management Help					
Reload	Reload Compile CSS Identify String Log Off					

When a site has at least one custom theme, a table similar to the PAC reload is displayed:

Reload Compile CSS Identify String Log Off					
Compile CSS					
PowerPAC Server	Custom Theme	Status			
https://rd-polaris.polarislibrary.com/polaris/	Compile 'MVLS' theme	Theme not yet compiled			
	Compile 'BCPL' theme	Theme not yet compiled			
	Compile 'Rube' theme	Theme last compiled: 1/24/2019 3:34 PM			
http://rubenau-lt.iii.com/polaris	Compile 'MVLS' theme	Theme not yet compiled			
	Compile 'BCPL' theme	Theme not yet compiled			
	Compile 'Rube' theme	Theme not yet compiled			

The table contains:

- PowerPAC Server the names of the servers on which the custom themes are compiled.
- **Custom Theme** the name of each custom theme found on the server. The name is clickable and executes the compile/recompile action on click.
- Status the status of the compile. This column will display one of the following:
 - Last date/time the theme was compiled successfully
 - Theme not yet compiled
 - Compiling
 - Compile failed with any error details

• Compile successful

http://QA-Polaris.polarislibrary.com/polaris/	Compile 'MVLS' theme	Theme last compiled: 4/24/2019 1:22 PM
	Compile 'BCPL' theme	Theme not yet compiled
	Compile 'Responsive Test' theme	Compiling

http://rubenau-lt.iii.com/polaris	Compile 'MVLS' theme	Theme not yet compiled
	Compile 'BCPL' theme	Compile failed File: 'G:\Projects\Dev\Software\src\PowerPAC\custom\themes\bcpl\scss\style- bcpl.scss' not found on server
	Compile 'Rube' theme	Compile successful

When the site does not have custom themes, the page will display the following message:

🛞 polarıs		Polaris Web Ad			
	Language Tools		PAC Tools	PAPI	
	Reload	Compile CSS	Identify String	Log Of	
Compile CSS					
No custom themes found.					

Security Improvements for Patron Password Workflows

Polaris 6.3 contains updates that improve security for patrons who create or reset the password for their library account from Polaris PowerPAC, Mobile PAC, or ExpressCheck.

In previous versions, a patron could request a new password by clicking a **Forgot your password?** link in either Polaris PowerPAC, Mobile PAC, or ExpressCheck. The library would then send a new password to the patron in an email message.

If a patron had a library account but had never created a password for the account, the patron could create a password by clicking a **Create a password** link in Polaris PowerPAC, Mobile PAC, or ExpressCheck.

In Polaris 6.3, a patron who wishes to create or reset a password can click a link in Polaris PowerPAC, Mobile PAC, or ExpressCheck and receive an email containing a timesensitive link to a Reset Password page where the patron can configure a new password. Libraries can use the new **Reset password link timeout duration** setting to specify the time period during which the time-sensitive password reset link remains valid.

Patron Workflow for Creating or Resetting a Password

Configuring the Reset Password Link Timeout Period

Other User Interface Changes

Patron Workflow for Creating or Resetting a Password

Patrons can use the workflow described below to reset a library account password or create a password for the first time in Polaris PowerPAC or Mobile PAC.

To reset or create a password:

 In Polaris PowerPAC, select Log In at the top of the page or Log In/Register from the My Account menu. In Mobile PAC, click the My Account link. Or, in ExpressCheck, scan your barcode or select Forgot your library card? Press here!.

The Log In page appears.

2. Click the Forgot your password? link.

A Reset Password page appears.

3. Enter your user name or barcode in the **Username or Barcode** box.

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4. Click Submit.

Your library sends an email to the email address associated with your library account.

5. Open the email and click the provided reset password link.

A Reset Password page opens in a new browser window or tab.

- 6. Enter your new password in the **New Password** box.
- 7. Enter your new password in the **Confirm Password** box.
- 8. Click Submit.

A confirmation message appears, and your library account is updated with your new password.

Configuring the Reset Password Link Timeout Period

A new **Reset password link timeout duration** profile setting is now available on the **Profiles > PAC** tab of the Administration Explorer.

This setting determines the time period (in minutes) during which the reset password link emailed to the patron remains active. The setting is available at the System, Library, and Branch levels. You can enter a value between 1 and 999 minutes. By default, the timeout period is set to 60 minutes.

If a patron clicks the reset password link after the active period has elapsed, a Reset Password page appears. The page notifies the patron that the reset password link has expired and prompts the patron to request a new one by entering a library user name or barcode.

The nightly Patron Processing SQL job removes reset password links after the specified active period has elapsed.

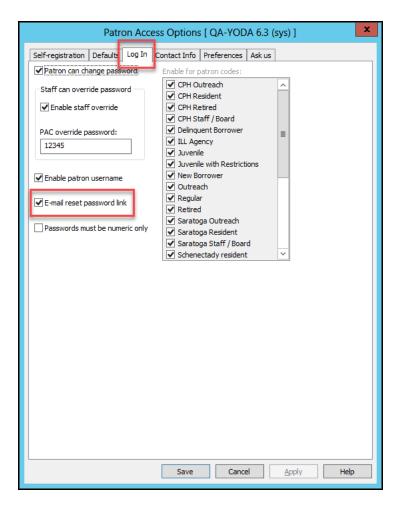
Other User Interface Changes

In the Administration Explorer, the **Display prompt for new password** setting no longer appears on the **Log In** tab of the Patron Access Options profile. This profile setting is no longer needed; a patron with an existing library account who has never created a password can create one using the workflow described above.

Updated E-mail Forgotten Password Label

The label for the optional system email forgotten password feature has been updated. The label is now called **E-mail reset password link**.

To access the feature in the Administration Explorer, go to **Profiles** > **PAC** > **Patron Access Options** > **Login**:



Leap Offline

Permission based Leap Offline is now available for circulating materials while your database server or network are unavailable. Each Windows user will have a unique installation of Leap Offline for each browser they use. Installation of the application is initiated through Leap and should be bookmarked for future use. The application uses the local storage features of your browser to store limited installation data that is required to process offline transactions. No patron data will be stored locally.

The Leap Offline application is shown below:

Offline Check Out				Complet
A12291954				
Enter item barcode	¢1		O Special Loan	
Item Barcode		Due Date		
0000101521664		7/10/2019		

Offline transactions are stored in the local storage of the user's browser until the user chooses to send them to the server for processing or to delete them.

As you work in Leap offline, you will see your transaction count increment with each check out. The Transactions badge will keep you informed of your progress.

Username: cheryl.stewart Organization: Community Librar		r / Transactions: 1	
	Settings	🖶 Print	

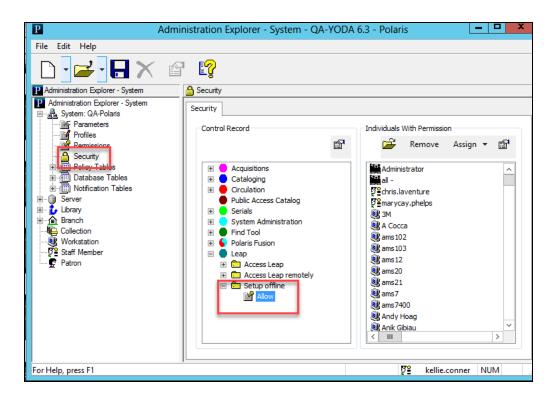
Selecting the Transactions badge will open a dialog showing all the offline transaction files you have generated, with an option to delete them. You should only delete

My Offline Files	Workstation: Stewart-LL Lisername: chenvistev	wart Ord X
Filename	Transactions	
PTF_2019062616143871_STEWART-LT.TRN	1	
I understand that deleting files cannot be undone.		
Delete All Files	Ca	ancel

transaction files you created while training or testing. Deleting files cannot be undone.

New Permission for Leap Offline Setup

A system administration permission to control which users can complete the Leap Offline installation is now available. Select **Security** > **Leap** > **Setup Offline** > **Allow**.



- This permission is not assigned at upgrade.
- Workstation access is permitted by default.
- The permission is not overridable.

Web Browser Information for Leap Offline

The following browsers are compatible with Leap Offline:

- Windows Chrome v74.0.3729.157+
- Windows Edge v44.17763.1.0+
- Windows Firefox v66.0.5+
- OS X Safari v12+
- OS X Chrome v74+
- iOS Safari 11.3+ (eg: iPad 5th+, iPad Air+)

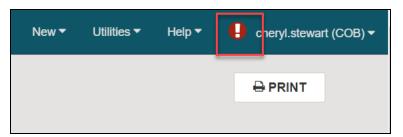
Incompatible browsers:

- Windows Internet Explorer (all)
- iOS Safari 1.0-11.2

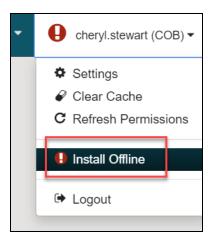
Leap Offline Installation

You must have the Leap Offline permission enabled and use a compatible web browser to install the application.

1. If Leap Offline has not been previously installed, you will see an installation Warning icon. To install, select the **Warning** icon:



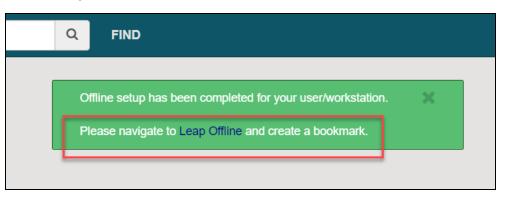
2. Select Install Offline:



3. You will see the following message:

	Q FIND	
	Installing offline files	×
I		

4. Select Leap Offline.



5. Leap Offline will open in the browser.

🐉 🏠 🔒 https://qa-polaris.polarislibrary.com/leapoffline/#/checkout		ର୍ ★ 🔉 ଅ
🔉 💁 Mail - cheryl.stewar 📙 Confluence links 📙 Flare and Capture 📙 Netsuite 📒 Dropbo	Bookmark added	× ələris
apOffline work	Name Leap Offline	nization: Co
▲ Check Out	Folder Confluence links	▼ Setting
Offline Check Out	More Do	Remove

Note:

The URL used to access Offline is case sensitive, and you should create a bookmark for it to access the Leap Offline application for future sessions.

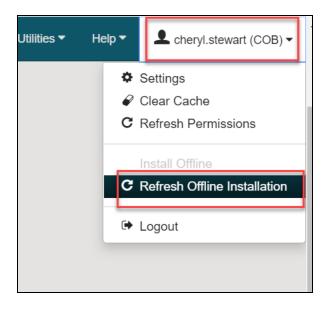
Note:

Offline data (both setup data AND actual transaction data) is stored in the local storage of the user's browser. You should not clear your cache while you have unprocessed offline transactions.

Refresh Leap Offline Installation

You have an option to update your Leap Offline installation with any changes made to system administration without manually clearing your cache and re-installing the application.

This option is found in the Leap application. Select **User Profile > Refresh Offline Installation**.



Refreshing the installation updates the following values:

- User ID
- User Name
- Workstation ID
- Workstation Branch ID
- Workstation Name
- Branch ID
- Standard Loan Period
- Branch Name
- Branch Phone
- Branch Home Page
- Branch Receipt Note
- Locale Name

Leap Offline Settings

The Settings workform in Leap Offline has several options.

Select **Print Options** to enable Check Out receipt printing for patrons. This selection is persistent unless the cache is cleared.

✿ Check Out	Settings 🖶 Print
Settings	Save Close
Print Options O Special Loan I Workform Defaults Installation	
Check out	

Select **Special Loan** to set a special loan period that applies to all checkouts. If selected, this value is stored globally for the loan session.

Settings		Save Close
Print Options Special Loan	🗄 Workform Defaults 🥜 Installation	
Apply to all check-outs		
 ✓ Jul	Loan period: 22	Days
1 2 3 4 5 6 7		
8 9 10 11 12 13 14		
15 16 17 18 19 20 21		
22 23 24 25 26 27 28		
29 30 31 1 2 3 4		
5 6 7 8 9 10 11		

Select **Workform Defaults** to view the value that is used to calculate the due date if the user doesn't choose to use the special loan. This value is not editable.

Settings			Save Close	
🖨 Print Options	O Special Loan	Workform Defaults	₽ Installation	
Workforms: Offline of Standard loan p	rheck out eriod (days) 14			

Select **Settings** > **Installation** to view installation settings. All values stored in the web browser's local storage during Leap Offline installation are displayed.

✿ Check Out		Settings 🖨 Print
Settings		Save Close
➡ Print Options	form Defaults	
Branch	User	Workstation
ID: 25	ID: 6085	ID: 3292
Name: Community Library	Name: cheryl.stewart	Name: Stewart-LT
Home Page:		Organization ID: 25
Phone Number: 518-234-7897		
Receipt Note: Sooner is usually better than later.		
Miscellaneous	Version	
Loan Period: 14	Offline: 1.0	
Locale Name: en-US	Polaris: 6.3.2269.0	

Uploading Offline Transactions

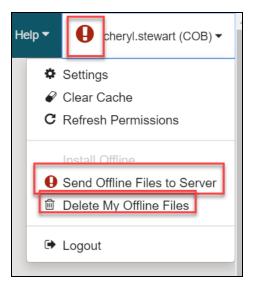
If you have unprocessed offline transactions when you log into Leap, you will see the following message:

Q FIND		New 🕶	Utilities 🔻	Help 🔻	L cheryl.stewart (COB) ◄
1 unprocessed offline transactions detected.	×				

The User profile icon is also set to the **Warning** icon. Select the icon to access options to process the offline transactions.

- The **Send Offline Files to Server** option sends all unprocessed offline transactions to the server for processing. All transactions sent to the server will be processed and uploaded using the Automatic Offline Upload process.
- The Delete My Offline Files options deletes all unprocessed offline transactions

from the browser. The deleted transactions cannot be recovered.



Columns Added For Display in Leap Item Find Tool

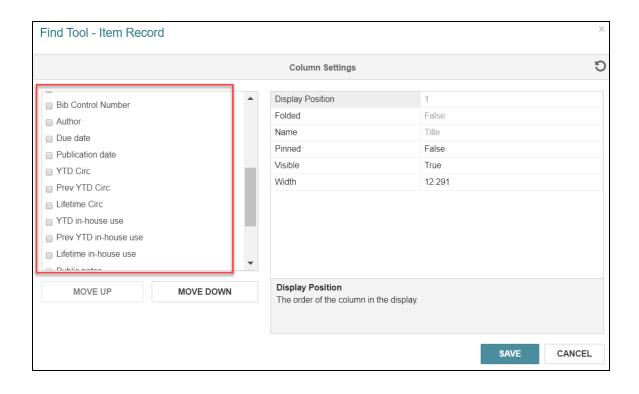
The following configurable columns were added under Column Settings in the Leap Item Find tool:

- Author
- Due date
- Publication date
- YTD Circ
- Prev YTD Circ
- Lifetime Circ
- YTD in-house use
- Prev YTD in-house use
- Lifetime in-house use
- Public notes
- Non-public notes
- Physical condition
- Copy number
- Assigned branch abbreviation
- PO number

In the Item Find tool select Column Settings:

Find Tool - Item Record						×					
Item Record > Basic Search	:h ► All k	eyword fie	elds 🕨 Ke	eyword (Al) ▶						
[#] Title	Assig	Colle	Mater	Shelf	Call	V	Status	Barcode	Last	Column Settings Search Filter Record Set Options	Ⅲ

The added columns can be selected and configured for display in the Item Find tool.



Improvement to Patron Properties in Leap

The patron's birth date is now included in the list of patron information that appears when you view patron properties in Leap.

LAURA IZQUIERDA ①							
C(PATRON INFO - 357715							
🏝 Check Out	PATRON CODE: RETIRED						
	BIRTH DATE: 12/1/1955						
2 Profile	HOME ADDRESS:						
Le Attributes	101 E. MAIN STREET						
🖂 Email	SYRACUSE, NY 13210						
Address	PHONE NUMBER: 315-512-5555						
& Phone/Fax	EMAIL ADDRESS: LAURA@III.COM						
A Notification	EXPIRATION DATE: 11/15/2022						
C Preference	NOTIFICATION OPTION: MAILING ADDRESS						
Mage Image	VOTER REGISTRATION: YES						
Misc. Info	PRIVILEGES / RESTRICTIONS: 4						
	ID NUMBER: 4						

Improved Sorting for Title Lists in Leap Patron Views

Lists of titles that appear in patron views in Leap are now sorted using Name Authority Cooperative Program (NACO) normalization rules.

Editing Saved Reports in SimplyReports

You can now edit all column and filter settings for the following types of saved reports: fund list reports, invoice list reports, and purchase order list reports.

You can also edit many other types of saved reports. See the SimplyReports user documentation for more information.