POLARIS

INTEGRATED LIBRARY SYSTEM

What's New in Polaris® 3.3

This document summarizes what's new and different in Polaris 3.3.
For detailed information, see Polaris 3.3 guides and online Help.

Important:
For information about developments that may have occurred after this information was published, go to **www.polarislibrary.com** and select **Customer Extranet**.

This icon indicates enhancements voted most important by the Polaris Users Group (PUG). Polaris development also reflects enhancement requests posted by customers in I.Trac, workflow analysis, and other direct customer feedback and suggestions. Additional features are prompted by new market opportunities, partnerships with other companies that serve our customers, new industry standards, and advances in the software and hardware that support library automation.

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Contents

Polaris 3.3 Requirements

Note:
Review all licensing issues and requirements whenever you install any Microsoft products.

Polaris 3.3 requires Microsoft Windows Server 2003 with Service Pack 1. *Microsoft Windows 2000 Server is no longer supported.* Microsoft Windows Server 2003 requires Microsoft Message Queue, available on the operating system disc but installed separately. The following additional required support software is installed automatically from the Polaris Windows Component Update disc:

- MS XML 6.0
- MDAC 2.8 Service Pack 1
- Microsoft Internet Explorer 6.0 with Service Pack 1
- MS Jet 4.0 Service Pack 8
- Adobe® Reader® 8.0
- Visual C++ Runtime
- SQL Native Client
- Microsoft.NET Framework 2.0 Service Pack 1

❑ **Web Server** - Microsoft Internet Information Server (IIS) 6.0 and Microsoft Internet Explorer 6.0 with Service Pack 1 must be installed on the Web server with Windows Server 2003. Microsoft Message Queue is also required.

❑ **Database Server** - Requires Microsoft SQL Server 2000 with Service Pack 4. The database server also processes statistical transactions, so it requires Microsoft Message Queue. Polaris 3.3 also supports SQL Server 2005. If you use SQL Server 2005, Microsoft SQL Server Native Client is automatically installed, if necessary, when you install the staff client.

Staff Client and ActivePAC Requirements

One of the following operating systems must be installed on every staff and public client (ActivePAC) computer:

- Windows 2000 Professional with Service Pack 4 (requires MSMQ 2.0)
- Windows XP Professional with Service Pack 2 (requires MSMQ 3.0)

Note:
You may continue to use older versions of Microsoft Windows on computers that connect to Polaris with Remote Desktop Connection.

All staff client and ActivePAC workstations require some combination of the following support software, depending on the version of Polaris you already have:

- MSMQ
- MS XML 4.0 Service Pack 2

- MDAC 2.8 Service Pack 1
- Microsoft Internet Explorer 6.0 with Service Pack 1
- MS Jet 4.0 Service Pack 8
- Adobe Reader 8.0
- SQL Native Client

The Polaris Prerequisites disc includes these applications. The appropriate applications are automatically installed when you run the CD.

Administration

This section summarizes the Polaris Administration settings that support Polaris 3.3 features, and describes general new features in Polaris Administration.

New Settings

The table lists the new and modified parameters, profiles, and tables that support Polaris 3.3. For more information about new features, see the other sections of this document as listed in the table, the Polaris 3.3 Administration guides, and Polaris 3.3 online Help (staff client).

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Staff Client Profiles				
Find Tool: Override SQL search blocks	This staff member can override the permission block message for saving a SQL search, modify a saved SQL search, or deleting a saved SQL search.	No	Staff	"Searching for Records Using SQL" on page 17
Label: Data file path	Specifies where label files are saved in terminal server and hosted environments	None specified	W, Staff	"Changes to Labels" on page 48
Library documentation - staff client	Specifies link to custom documentation. Replaces **Staff guided tours location** profile.	None specified	S, L, B, W	"Library Documentation Links" on page 12
Receipt printer control codes	Set large print, bold print, red print, and auto-cutting for printers that support these features	Control codes supplied for several printers	S	"Setting Receipt Printer Control Codes" on page 99
Report Server	Report Server settings	N/A	S, L, B, Staff	"Report Server Settings" on page 10
Acquisitions/Serials Parameters				
Bulk Add to PO/SL: Mark 970 data as processed	Marks 970 tags as processed in both purchase orders and selection lists	Yes	S, L, B	"Indicator for Records Bulk Added to Selection Lists" on page 32
Bulk Add to PO: Add alert to PO line item for multiple ISBNs	Indicates on a purchase order line item that it is linked to a bib record with multiple ISBNs	Yes	S, L, B	"Alert for Multiple ISBNs" on page 32
Default display of issues on Check In	Sets default display on Serials Check In workform to Expected or All issues	Expected	S, L, B	"Serial Issues Display" on page 60
Enter unit price at serials check-in	Specifies whether a prompt for the unit price of the serial issue appears when you issues are checked in.	Yes	S, L, B	"Serials Check In Unit Price Prompt" on page 61

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Acquisitions/Serials Profiles				
Titles to Go	Enables Titles to Go ordering for the selected suppliers.	None specified	S, L, B	"Titles to Go" on page 25
Cataloging Profiles				
Automatic Authority Control	Enables automatic authority control and specifies the database to search.	No	S, L, B	"Automatic Authority Control" on page 38
Retain deleted authority records	Retains this type of deleted record (with deleted status) until purged	Yes	S	"Retain Specific Types of Deleted Records" on page 52
Retain deleted bibliographic records	Retains this type of deleted record (with deleted status) until purged	Yes	S	"Retain Specific Types of Deleted Records" on page 52
Retain deleted item records	Retains this type of deleted record (with deleted status) until purged	Yes	S	"Retain Specific Types of Deleted Records" on page 52
Copied item records default to In-process	Sets copied item records to a status of In-Process	Yes		"Copying an Item Record and Circulation Status" on page 53
Patron Services Parameters				
Free days (normal)	Sets the default number of free days on the Check In workform for normal check-in.	0	S, L, B	"Free Days" on page 82
Holds pickup slip options	Enables slips intended for items in libraries where patrons pick up their own held items; specifies optional information fields; sets the length of the blank "tail" on the holds pickup slip; enables appended (combined) pickup slips	Not enabled	S, L, B	"Hold Pickup Slip Available" on page 79
Lost item recovery	Sets default (automatic) actions to take when a lost item is recovered at circulation	No change from 3.2 behavior	S, L, B	"Lost Item Recovery Default Actions" on page 88
Lost item: Charge overdue if billed	Controls whether overdue fines are charged when an item is billed	Yes	S, L, B	"Overdue Fines on Items Billed-to-Lost or Declared Lost" on page 89
Lost item: Charge overdue if declared lost	Controls whether overdue fines are charged when an item is declared lost	Yes	S, L, B	"Overdue Fines on Items Billed-to-Lost or Declared Lost" on page 89
Replacement fee options	Sets replacement and processing fees for lost items by material type	Taken from 3.2 system-level parameter; same for all material types	S, L, B	"Replacement and Processing Fees by Material Type" on page 86
Shelving status options	Sets the display of a shelving status description when an item is checked in - covers the period when an item's circ status has changed to In but it has not been returned to the shelves	Not enabled	S, L, B (time period); S (text)	"Shelving Status Option for Checked-In Items" on page 83

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Notification Parameters				
Active default notification delivery method	Sets delivery method for *all* types of notice when method cannot be determined from patron record	Print	S	"Default Notice Delivery Method" on page 97
Notification options - General tabbed page	Set up notices for export to an outside delivery vendor	Not enabled	S, L, B	"Exporting Notices to a Notification Service" on page 98
Notification options - Request tabbed page	Set up cancelled request notices	Not enabled	S, L, B	"Cancelled Request Notices" on page 95
Notification options - Serial Claim tabbed page	Set up serial claim notices	Not enabled	S, L, B	"Serial Claim Notices" on page 96
Request Parameters				
Hold Options - Requests tabbed page: If no items attached	Separate settings for **Alert in staff client** and **Block in PAC**	Both options unchecked	S, L, B	"Bib-Level Hold Requests with No Items Attached" on page 73
Credit Card Payment Parameters (new)				
Online Payments: Configure	Set up VeriSign® Payflow Pro credit card processing for the staff client, PAC, and Polaris ExpressCheck, or set up Class Point of Sale credit card processing for the PAC. Replaces PowerPAC profile **Online Payments: Configure**.	No options enabled	S, L, B	"Credit Card Payments - Staff Client, PAC, and Polaris ExpressCheck" on page 105
PAC Profiles				
Did You Mean: Enabled	Specifies whether Did You Mean search suggestions are displayed in Polaris PowerPAC, Polaris PowerPAC Children's Edition, and ActivePAC.	Yes	S, L, B	"Did You Mean Search Term Checking" on page 128
Did You Mean: Suggestions are to display even when hits are returned	When Did you Mean is enabled, specifies whether Did You Mean search suggestions are displayed with search results (Y), or only when a search returns no hits (N). (Profile does not affect Polaris PowerPAC Children's Edition.)	Yes	S, L, B	"Did You Mean Search Term Checking" on page 128
Multiple language strings - Diacritics	Add diacritic characters to messages, news headings, and search results data labels	N/A	S, L, B	"Diacritic Characters Available" on page 122

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Purchase options	• Generic Link tab - enable and set up vendor for PAC Purchase link • Polaris Bookstore tab - enable and set up Polaris Bookstore (Buy It Now link) Replaces **Purchase Enable**; **Purchase: URL Prefix**; **Purchase: URL Suffix**	No options enabled	S, L, B	"Polaris Bookstore" on page 151
PowerPAC Profiles				
Alternate Logo (URL)	Specifies an address for your own logo image	None	S, L, B	"Page Banner and Controls Redesigned" on page 117
Currently Logged Into List Alphabetical Order	Sets the branch display order to alphabetical	No (branches listed by internal organization ID, as in 3.2)	S, L, B	"Switching Connection Branches" on page 118
Dashboards: Narrow you search & Related searches	Enables and sets up the Narrow and Related Web parts for the search results page dashboard	Both Web parts enabled; all possible elements displayed	S, L, B	"Related Searches Web Parts in Dashboard" on page 138
Dashboards: Web part construction - Polaris and 3rd Party tabbed page	New Titles - Total Listing - limit number of titles that should display for a New Titles category	0 (no limit)	S	"RSS Feeds Improved" on page 120
Item availability: Expand non-serial titles	Replaces Item availability: Expanded. Sets the default item availability display to expanded or closed for non-serial items (those with no holdings statement for the branch).	Yes	S, L, B	"Compressed Serials Holdings Display in Search Results" on page 134
Item availability: Expand serial titles	Sets the default item availability display to expanded or closed for serial items (those with a holdings statement for the branch)	No	S, L, B	"Compressed Serials Holdings Display in Search Results" on page 134
Librarian's (MARC) View: Enable	Displays a link to open the MARC display for a title	Yes	S, L, B	"MARC Record View (Librarian's View)" on page 115
Portal custom content (URL)	Specifies the URL for custom portal page content.	None specified	S, L, B	"Custom Content on the Portal Page" on page 117
Quick search button configuration	Enables a quick search feature for the portal page that includes search button options, and configures the buttons	Not enabled	S, L, B	"Library Icon in Browser Address Bar" on page 122
Result set: Maximum number of records to return	Limits the potential size of the results set.	100,000 (maximum)	S, L, B	"Results Set Size" on page 137
Search settings defaults	For each search type, sets default Search by, Limit by, and Sort by options	Vary per search type	S, L, B	"Availability Search Filter" on page 126

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Suppress item display	Sets circulation statuses that should suppress display of an item in search results	None suppressed	S, L, B	"Suppressing Items by Circulation Status" on page 137
Title Display: Configure	Specifies the data fields and labels to display in the brief and full search results views; sets display order and line spacing	3.2 data display	S, L, B	"Customizing Search Results Data" on page 133
Virtual Reference: Supplier	Specifies virtual reference vendor; QuestionPoint is a new choice. Also available in 3.2, build 565 or later.	N/A	S, L, B	"QuestionPoint^{SM} Virtual Reference Service" on page 150
Virtual Reference: Configure - QuestionPoint tabbed page	Contract-specific settings for QuestionPoint virtual reference. Also available in 3.2, build 565 or later.	N/A	S, L, B	"QuestionPoint^{SM} Virtual Reference Service" on page 150
Children's PAC Profiles				
Category construction - Language Strings dialog box - Diacritics	Add diacritic characters to search category names	N/A	S, L, B	"Diacritic Characters Available" on page 122
Item availability: Display branch location	Displays branch location in item availability view. This profile is the same as Item availability: Display location in previous versions of Polaris; it has simply been renamed.	Yes	S, L, B	N/A
Item availability: Display shelf location	Displays shelf location in item availability view.	Yes	S, L, B	"Shelf Location in Polaris PowerPAC Children's Edition" on page 148
Result set: Maximum number of records to return	Limits the potential size of the results set.	1,000	S, L, B	"Results Set Size" on page 137
Search button visibility: Anywhere button	Displays Anywhere button for text string (Look for) searches	Yes	S, L, B	"Displaying Search Choices (Children's PAC)" on page 147
Search button visibility: Authors button	Displays Authors button for text string (Look for) searches	Yes	S, L, B	"Displaying Search Choices (Children's PAC)" on page 147
Search button visibility: Fiction button	Displays Fiction button for text string (Look for) searches	Yes	S, L, B	"Displaying Search Choices (Children's PAC)" on page 147
Search button visibility: Non-Fiction button	Displays Non-Fiction button for text string (Look for) searches	Yes	S, L, B	"Displaying Search Choices (Children's PAC)" on page 147
Search button visibility: Series button	Displays Series button for text string (Look for) searches	Yes	S, L, B	"Displaying Search Choices (Children's PAC)" on page 147

Profiles/Parameters/ Tables	*Purpose*	*Default*	*Level*	*More Info*
Search button visibility: Subject button	Displays Subject button for text string (Look for) searches	Yes	S, L, B	"Displaying Search Choices (Children's PAC)" on page 147
Search button visibility: Title button	Displays Title button for text string (Look for) searches	Yes	S, L, B	"Displaying Search Choices (Children's PAC)" on page 147
PAC Active Client Profiles				
Result set: Maximum number of records to return	Limits the potential size of the results set.	100,000 (maximum)	S, L, B	"Results Set Size" on page 137
Policy Tables				
Patron Block Descriptions	Set library-assigned patron block descriptions, order the block display	N/A	S, L, B	"Library-Assigned Patron Blocks Improved" on page 65
Database Tables				
Circulation Statuses	Modify the displayed descriptions of item circulation statuses	System status text	S, L, B	"Modifying Item Status Descriptions" on page 90
Did You Mean Overrides	Sets override suggestions for search terms that are displayed instead of system-generated suggestions	N/A	S, L, B	"Did You Mean Search Term Checking" on page 128
Item Block Descriptions	Set library-assigned item block descriptions, order the block display	N/A	S, L, B	"Re-Ordering Item Blocks" on page 65
Item Create Price Hierarchy	Specify the tags and subfields containing prices in the bib record that should be sources for prices copied to linked item records	N/A	S, L, B	"Price in Item Record from Linked Bibliographic Record" on page 43

New Permissions

Permissions have been added to support Polaris 3.3 features. Unlike previous versions of Polaris, *new permissions are not necessarily granted to existing staff members by default*. The table lists the new permissions as they appear in the Polaris Administration Explorer (**Security**), with their default settings.

Note:
For more information about these permissions and the functionality they support, see the other sections of this document, the Polaris 3.3 Administration guides, and Polaris 3.3 online Help (staff client).

Subsystem	*New Permissions*	*Level*	*Default Assignment*
Acquisitions	Modify bib record from acquisitions and serials	System	Yes
	Invoices: Pay invoice exceeding fund expenditure limits	Branch	Yes
Circulation	Circulation check-in workform: Access Bulk mode	System	Yes
	Circulation check-in workform: Access In-House mode	System	Yes
	Circulation check-in workform: Access Inventory mode	System	Yes
	Circulation check-in workform: Access Normal mode	System	Yes
	Fines: Allow credit card payments	System	Yes
	Fines: Allow refunds	System	Yes
	Modify free days: Allow	System	Yes
	Modify lost item amount: Allow	System	Yes
	Override non-circulating blocks: Allow	System	Yes
	Override renewal limit blocks: Allow	System	Yes
	Patron Status: Access	Branch	Yes
	Patron Status: Modify notes	Branch	Yes
	Remove collection agency block: Allow	System	Yes
	Renew overdue items: Allow	System	Yes
Serials	Serial issues/standing order parts: Claim	Branch	No
System Administration	Modify did you mean overrides table: Allow	System	No
	Modify PAC brief title display: Allow	System	No
	Modify PAC full title display: Allow	System	No
	Modify item price hierarchy table: Allow	System	No
Find Tool (new **Security** node)	Find Tool: Access SQL search mode: Allow	System	Yes
	Find Tool: Create or modify named SQL searches: Allow	System	No
	Find Tool: Delete named SQL searches: Allow	System	No

Permissions for New Staff Members

In previous versions of Polaris, new staff members were automatically granted all permissions. In Polaris 3.3, a new staff member record contains no permissions, and you must explicitly add permissions to the record. If you try to save a new staff record without adding permissions, a confirmation message appears. You can choose to save the record with no permissions, or cancel the save and add the permissions.

Report Server Settings

The Staff Client profile **Report Server** is now available at the staff member level, in addition to the system, library, and branch levels. This change was also made in Polaris 3.2, build 478 or later. You set the report server URL, reports services URL, reports root folder, and optional Windows authentication with this profile.

Report Manager Updates

Updates to the Report Manager can now be installed on client workstations independently from Polaris staff client software updates.

Searching for Server Records

In the Polaris Find Tool, the search access points for server records have changed. The table shows the new access points:

Access Point	*Mnemonic Code*
Server Name	SVRN
Server Type	TYPE • SQL server: TYPE=1 • Z39.50 server: TYPE=2 • WWW server: TYPE=3

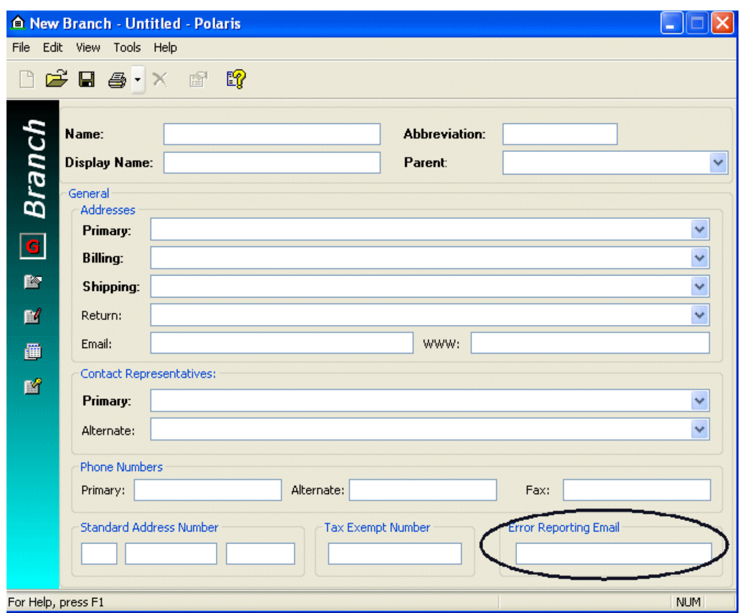
Server Name is available as a **Search by** option in the Find Tool. Server types are available as **Limit by** options. For information about additional Find Tool changes, see "Find Tool Enhancements" on page 14.

Organization Display Name

Organization workforms (system, library, and branch) include a new **Display Name** field. The name you specify in the **Display Name** box identifies the organization in the workform title bar. If you do not specify a display name, the organization abbreviation is used. On the Polaris Shortcut bar, the display name of the logged-in workstation’s parent organization appears in the title bar and in the About Polaris window (Help menu).

Error Reporting

Using new controls on the system, library, and branch workforms, you can enable error reporting and specify the e-mail address of the administrator who should receive the error message. You can use error reporting to identify workstations that have stopped functioning due to unhandled exceptions. If you use Polaris ExpressCheck and credit card processing (see “Credit Card Payments from Polaris ExpressCheck” on page 110), an error report is sent if a credit card refund is not successful when a lost or billed item charge needs to be resolved. Your error reporting settings at the system level are inherited by libraries and branches unless you change the settings at those levels. To set up error reporting, in the **Error Reporting Email** box on the organization workform, type the e-mail address of the administrator who should receive the report of a system error. If you do not specify an address, no report is sent.



Documentation and Online Help

In Polaris 3.3, documentation and online help improvements have focused on delivering current information where and when you need it.

Context-Sensitive Help in the Staff Client

Help with specific workforms and dialog boxes has been expanded and improved with summaries, tips, and links to more detailed information. To access this kind of help on a workform, press **F1** or click . On a dialog box, click **Help**. What's This (**SHIFT-F1**) help has been eliminated, and the information has been included on the workform/dialog box help page.

Documentation Updates

Check **Polaris Releases** on the Customer Extranet periodically for additional documentation. To access the Extranet, go to **www.polarislibrary.com** and select **Customer Extranet**.

Staff Client Help File Updates

Online help for the Polaris 3.3 staff client may be updated periodically, posted on the Customer Extranet, and delivered with Polaris upgrades. The compiled staff client help file is always named **Polaris.chm**, and is installed in the **<SYSTEM DRIVE>/Program Files/Polaris/3.3/Help** folder on each computer where the Polaris staff client is installed. Like other .chm files, Polaris.chm must be located on a lettered drive, such as the C: drive or a disk in the CD drive. Due to Microsoft security measures, it does not work properly when accessed via Internet or on an unmapped network location. If you download an updated Polaris.chm file from the Customer Extranet, place it in the **<SYSTEM DRIVE>/Program Files/Polaris/3.3/Help** folder.

Library Documentation Links

In the Polaris staff client, the Help menu option **Guided Tours** has been changed to the more descriptive **Library Documentation**. This option is a link to your own custom help information. As in previous releases, you use a Staff Client profile in Polaris Administration at the system, library, branch, or workstation level to set the file path to your custom documentation. The profile name has been changed from **Staff guided tours location** to **Library documentation - staff client**, and in Polaris 3.3, you can specify a URL (begin with **http://**) instead of a file path. By default, the profile is blank.

As in previous versions of Polaris, the Help menu option **Online Documents** opens the navigation page to the entire Polaris documentation set by default. You can use the Staff Client profile **Online documents location** at the system, library, branch, or workstation level to set the file path to a single Polaris-provided .pdf file or to your own document. In Polaris 3.3, you can specify a URL (begin with **http://**) instead of a file path.

Reports Documentation

Basic procedures for running Polaris reports are covered in the *Polaris Basics Guide*. Specific reports are described with the subject matter to which they pertain. For example, the Unlinked Authority Records report is described in the "Maintaining Your Catalog" unit in the *Polaris Cataloging Guide*. Each report is indexed by name for ready access. As in previous versions of Polaris, Polaris online Help includes a comprehensive index to the entire Polaris documentation set.

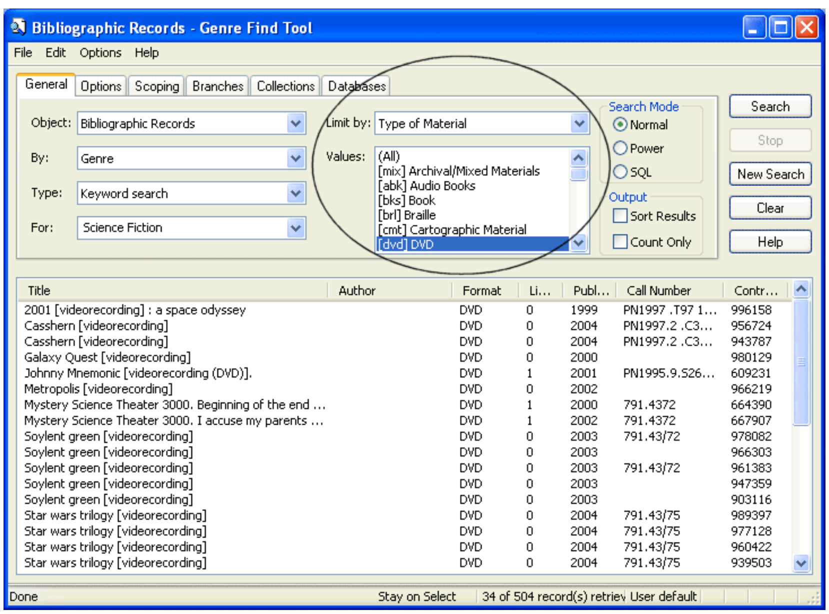
Staff Client (General)

Find Tool Enhancements

Several enhancements were added to the Polaris Find Tool to provide easier search scoping, more search options, and greater flexibility with search results. With these precise searching capabilities, you can generate quick reports for a variety of purposes. You can also send search results to a record set without displaying the results first.

Limit by Option on the Find Tool General Tab

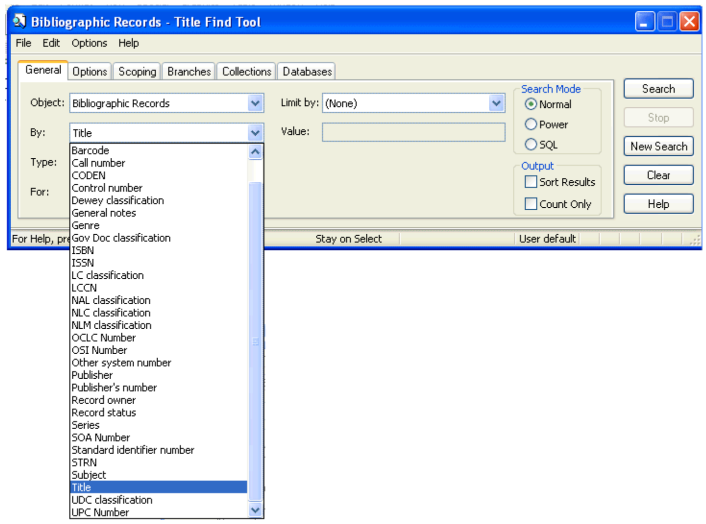
When you enter search criteria in the Find Tool, you can select limits to help you narrow your search. Select a **Limit by** option, and then type or select a value in the **Value** box. For example, if you selected **Author** in the **Limit by** box, you would type the name of the author in the **Value** box. If you selected **Type of Material** in the **Limit by** box, you would choose a type of material from a list in the **Value** box. You can save the search **By** and **Limit by** settings as your user defaults (**Options, Save as user default**), but the values are not saved.



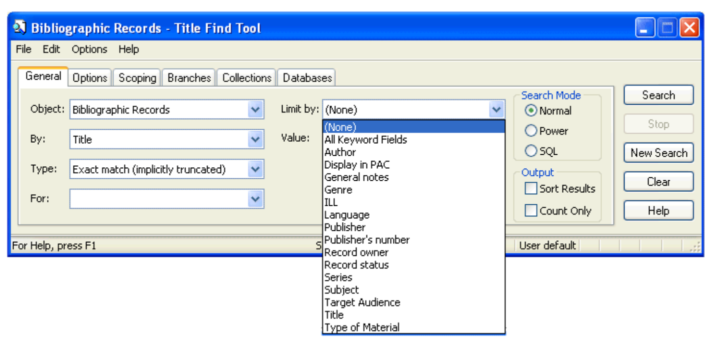
New Access Points - Search By and Limit By

The Find Tool includes more search access points. Select the record type you want to search for in the **Objects** box, and open the drop-down lists in the **Search By** and **Limit By** boxes to see the options that are available for the object you selected.

- **Search By Access Points for Bibliographic Records**



- **Limit By Options for Bibliographic Records**



The following are examples of some new access points:

- **Standard Identifier Number** - Search for bibliographic records by the Standard Identifier Number. You can also use the Standard Identifier number to search for purchase order or invoice line items linked to the bibliographic record. This number is often used to uniquely identify non-print materials, instead of an ISBN. The search process looks for this number in bibliographic tags where the UPC or other stock number is typically stored: ISBN (020 tag), ISSN (022 tags), OSI (024 tag), STRN (027 tag), PN (028 tag), CODEN (030 tag), OCN (035 tag), and SOA (037 tag).
- **UPC** - Search for bibliographic records by a specific UPC number. A UPC is often used to uniquely identify non-print materials.

- **OCLC Number** - Search for bibliographic records and authority records by the OCLC number.
- **Creation Date -** Search for templates and record sets by their creation date.
- **Purchase Order Line Item ID** - Search for purchase order line items by the number that uniquely identifies them in Polaris. This number is used for exact matching in Rapid Receipt from the Invoice workform. See "Purchase Order Line Item ID on Printed Purchase Orders" on page 27.
- **EDI** - Search for suppliers who accept EDI orders.
- **Many new access points for item records** - Search for item records by notes, blocks, check-in location, material type and other options.

- **SICI** - Search for serial issues, items, serial holdings records and check-in records by SICI barcode.

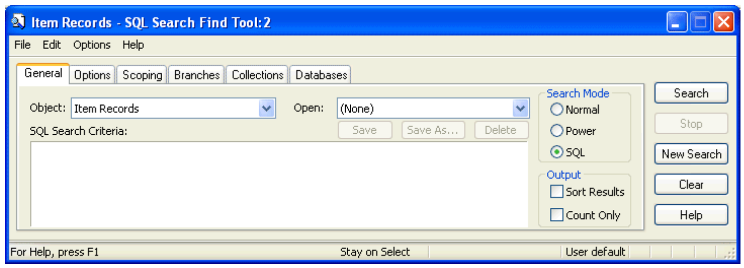
- **Branch and collection** - Search for serials records and limit by branch and collection.
- **Record Sets -** If you access the Find Tool from the Cataloging menu, you can limit the search by record type: **Authority**, **Bibliographic** or **Item**. If you access the Find Tool from the Patron Services menu, you can search for patron record sets and limit by **Name** and **Owner**.

Searching for Records Using SQL

You can do a search for records using Structured Query Language (SQL). In the Polaris Find Tool, SQL is used for data retrieval only. You cannot manipulate data in the Polaris database through SQL.

Tip:
After you have queried the database using an SQL search, you can sort and print the Find Tool results list for a quick report.

To do an SQL search in the Polaris Find Tool, select the type of record to search by in the **Object** box on the General tab of the Find Tool, and select **SQL**. Then type the SQL query in the SQL Search Criteria box.



Examples:
To find item records without an assigned collection, type:

SELECT ItemRecordID AS RecordID FROM CircItemRecords WHERE AssignedCollectionID IS NULL

To find item records with no status code, type:

SELECT ItemRecordID AS RecordID FROM CircItemRecords WHERE StatisticalCodeID IS NULL

You can save the SQL search criteria for later use by clicking **Save** and giving the search a name. The search is listed under the name you gave it. When you search again for the same type of record (object), the saved search is listed.

A staff member's ability to use the Find Tool SQL mode is controlled by three new permissions:

- **Find Tool: Access SQL search mode**
- **Find Tool: Create or modify named SQL searches**
- **Find Tool: Delete named SQL searches**

A staff member who has the first permission, but not the create/modify or delete permissions, receives a permission block message when attempting save an SQL search, modify a saved search, or delete a saved search. To allow a supervisory staff member to override the permission block, set the new Staff Client profile **Find Tool: Override SQL search blocks** to **Yes** for the staff member.

Return a Count of Search Results

You can select the **Count Only** check box on the Find Tool, General tab to see a count of the records you searched for without displaying the results. When you select **Count Only**, your retrieval limits are not checked; the count is for all records that meet the criteria you set.

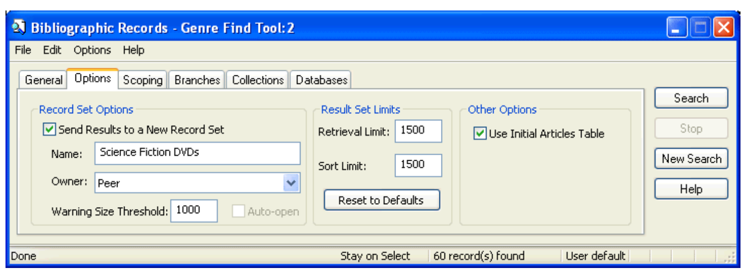
Relevancy Ranking in the Find Tool

If you do a keyword or phrase search for bibliographic or authority records, the records that match are ranked for relevancy. Then, only the most relevant records are displayed in the Find Tool, according to the retrieval limit you have set.

If you select **Sort Results**, the result set is ordered by relevancy automatically and then re-ordered by title and author before any records are returned.

Record Set Creation

The Miscellaneous tab was renamed **Options**, and other selections were added. You can now create a record set from the results, with or without displaying the results, and immediately open the record set without having to search for it.

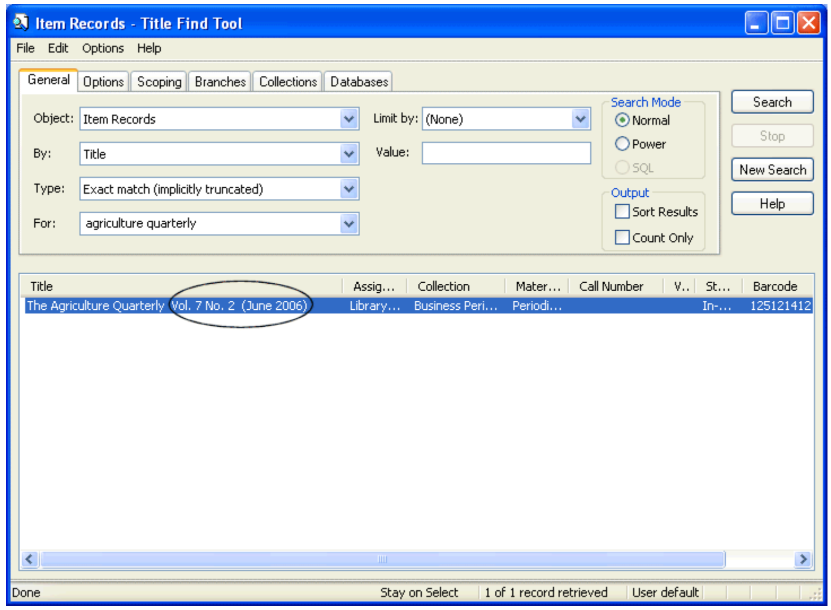


Find Tool Results List

- ❑ **Delete multiple record sets** - You can select multiple record sets, right-click and select **Delete** from the context menu.

- ❑ **Purchase Orders and Invoices** - The number of line items and the dollar amount display in the results list.
- ❑ **New column headings**
  - **Authority records** - The number of linked *See Also* records.
  - **Cataloging templates** - Type of template (item, bibliographic or authority) and **Date Created** and **Last Modified**.

- **Serials** - Items that are linked to serial issues display the issue's designation at the end of the title.



- **Item records in Shelving status** - Item records that are in but are being "shelved" are displayed in the Find Tool results list with the Shelving text in the **Status** column. The item record actually has a status of In, but it is given a temporary status if you have specified shelving criteria and it fits in this category. See "Shelving Status Option for Checked-In Items" on page 83.
- **Supplier Records** - The **EDI** column displays **Yes** or **No** to indicate that the supplier does or does not accept EDI orders.

Creating Links to Other Records

When you create new links from one record to another record, select **Tools, Create Links** instead of **Links, Create**. The Links menu displays only the types of existing records to which it is possible to link.

Statistical Summary Report

This extensive new report, available under **System** in the Report Manager, replaces the Statistical Overview and Circulation Summary Statistics reports included in earlier versions of Polaris. You can filter the report by date and by organization. The report includes the following categories and details, as well as the totals in each category and the grand total in each category for all selected branches (the sum of individual branches):

❑ **Record counts** (total counts, not restricted by date range)

- **Bib records with items** - Bib records with at least one item attached, where the record owner is the reporting branch.
- **Bib records without items** - Bib records with no item records attached, where the record owner is the reporting branch.
- **Authority records** - All authority records with a status of Final. Provisional and deleted records are not counted.
- **Item records** - All item records where the assigned branch is the reporting branch. Does not include provisional or deleted records, or items with a circulation status of Withdrawn.
- **Patrons** - All patron records where the registered branch is the reporting branch.
- **Staff** - All staff member records where the staff member organization is the reporting branch.
- **Workstation** - All workstations where the workstation organization is the reporting branch.

❑ **Circulation statistics**

- **Check-outs** - All check-out transactions within the specified date range at all workstations where the workstation logon branch for the transaction is the reporting branch. Includes staff client renewals; PAC renewals; inbound telephony renewals; offline check-out; Polaris ExpressCheck check-out and renewals; Quick-circ check-out; SIP, NCIP or remote, third party check-out.
- **Borrowers** - Counts all unique patron IDs in check-out transactions within the specified date range at all workstations where the workstation logon branch for the transaction is the reporting branch.
- **Check-in** - All check-in transactions within the specified date range at all workstations where the workstation logon branch for the transaction is the reporting branch. Includes normal mode check-in; bulk mode check-in; offline check-in; in-house circulation; Quick-circ check-in; SIP or remote, third party check-in; any item that is scanned but is already in (in-to-in). Automatic-check-ins (those that occur during check-out or when holds are filled), inventory check-ins, or Polaris Inventory Manager check-ins are not counted.

- **Overdue items checked in** - All transactions within the specified date range at all workstations where the workstation logon branch in the transaction is the reporting branch and the transaction indicates the item was overdue. The number of overdue items checked in is included in the count of total check-ins.
- **Holds placed** - Hold statistics are based on the holds transactions. Includes all hold requests where the workstation branch is the reporting branch and that have an activation date within the date range. Also includes re-activated requests, requests that have been suspended and re-activated, and requests placed from the PAC. (You can also see a separate count of PAC requests. See the PAC section.)
- **Holds satisfied** - All hold requests where the workstation branch is the reporting branch, and that have had a request status of Held or Transferred with a status date within the date range.
- **Holds cancelled** - All hold requests where the workstation branch is the reporting branch, and that have a request status of Cancelled with a status date within the date range. Includes requests cancelled from the PAC. (You can also see a separate count of PAC cancelled requests. See the PAC section.)

❑ **Records added and deleted** - These counts are based on transaction file data.

- **Bib records added** - All bib records created within the date range where Organization ID is the reporting branch.
- **Authority records added** - All authority records created within the date range where Organization ID is the reporting branch.
- **Item records added** - All item records added or created within the date range where the assigned branch in the item creation transaction is the reporting branch. Includes records with a status of Active or Provisional, but not those with a status of Deleted.
- **Patron records added** - All patron records created within the date range where the Organization ID is the reporting branch. The Organization ID is the patron's registered branch. The report counts all patrons registered for the selected branch, regardless of where the registration occurred, and includes PAC self-registrations. (You can also get a separate count of PAC registrations. See the PAC section.)
- **Bib records deleted** - All bib records deleted within the date range where the Organization ID is the reporting branch.
- **Authority records deleted** - All authority records deleted within the date range where the transaction Organization ID is the reporting branch.
- **Item records deleted** - All item record deleted within the date range where the assigned branch is the reporting branch.

- **Item records withdrawn** - This count is not based on transactions, but on the item status and status dates. Includes all item records where the assigned branch of the item is the reporting branch; the item circulation status is Withdrawn; and the circulation status date falls within the selected date range.
- **Patron records deleted** - All patron records deleted within the date range where the patron's registered branch is the reporting branch.

❑ **Financials**

- **New charges** - All charges created within the date range where the parent branch of the workstation that created the charge is the reporting branch.
- **Money collected** - All amounts paid within the date range where the parent branch of the workstation that took the payment is the reporting branch. Includes full and partial payments, credit card payments, and payments made from PAC and Polaris ExpressCheck. If the workstation branch can not be determined, the report credits the amount to the organization responsible for the charge.
- **Refunds** - All amounts refunded (refund transactions) within the date range, where the workstation branch of the transaction is the reporting branch. Includes credit card refunds.
- **Net** - Money Collected minus Refunds.
- **Amounts waived** - The sum of all waived amounts within the date range, where the workstation branch is the reporting branch.
- **Outstanding fines** - The total of all charges where the organization identified in the charge (Patron Status workform - Account view) is the reporting branch. This is not all money owed by all patrons registered at the branch, but all money owed to the branch, regardless of who owes it. The calculations for these values are identical to those for the existing Fines and Fees report.

❑ **PAC statistics** - At the branch level the report counts only in-library use, using the PAC workstation login branch.

- **Patron logins** - All logins from PAC within the date range where the patron's registered branch is the reporting branch. The count includes any login; for example, to view the patron account or to place a request.
- **Patron self-registration** - A count of PAC registrations within the date range where the patron's registered branch is the reporting branch. This number is also included in the total number of registrations reported (see the Records Added and Deleted section).
- **Holds placed from PAC** - All hold requests placed within the date range where the pickup branch is the reporting branch. The total is also included in the Holds Placed count in the Circulation Statistics section.

- **Holds cancelled from PAC** - All hold requests cancelled within the date range where the pickup branch is the reporting branch. The total is also included in the Holds Cancelled count in the Circulation Statistics section.

Default Dates for Reports

For reports where you specify a time period, the default values are now based on the parameter name (date, month, or year), instead of the current date and time. For example, if you are running the report on 8/9/2006 at 5:00:00PM, the default settings for time period parameters are these:

Parameter	*Default Value*
BeginDate	8/9/2006 12:00:00AM
EndDate	8/9/2006 11:59:59PM
BeginMonth	8/1/2006 12:00:00AM
EndMonth	8/31/2006 11:59:59PM
BeginYear	1/1/2006 12:00:00AM
EndYear	12/31/2006 11:59:59PM

Acquisitions

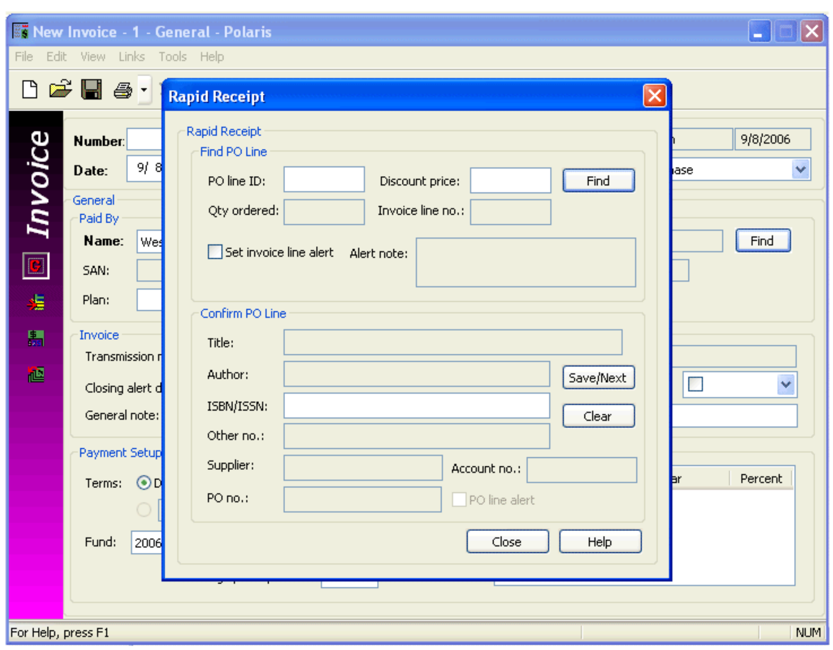
The enhancements to Acquisitions in Polaris 3.3 were designed to help streamline your library's workflow.

Rapid Receipt from an Invoice

You can receive purchase order line items from the Invoice workform using the Rapid Receipt dialog box. When a shipment arrives from a vendor, simply go through the printed invoice, enter each purchase order line item ID number or ISBN, verify that the information is correct, and save the line item. The purchase order line item is received, the linked items are updated to **In process**, and the invoice line item is added to the Invoice workform in one step. The dialog box remains open so you can add the next line item.

The matching is most accurate when you use the purchase order line item ID. This number is generated by Polaris as a unique identifier for the purchase order line item. The printed purchase order has a purchase order line item ID for each title ordered, so your vendor can include this number on invoices. If your vendor does not include this number, you can still match purchase order line items by ISBN, but this may not as accurate as matching by purchase order line item ID.

Open the Rapid Receipt dialog box by selecting **Tools, Rapid Receipt** or clicking  on the Invoice workform.



When there is one exact match for the purchase order line item ID or ISBN/ ISSN you entered, the information from the purchase order line item appears in the Rapid Receipt dialog box. You verify the information that is pulled in, change the discount price, if necessary, save the entry, and go to the next line item. The line items are added to the invoice, and the linked purchase order line item is received. After each invoice line item is created, you can review your totals and make adjustments to match your paper invoice. See "Receiving" (Acquisitions topics) in staff client online Help.

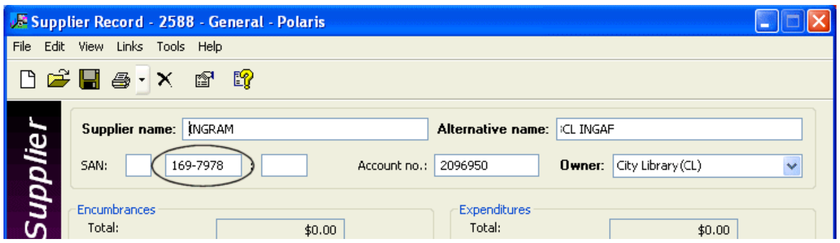
You can print line item workslips from the Invoice workform as well as from the purchase order workform. You can use the Rapid Receipt dialog box to receive all your purchase order line items on the Invoice workform, and print your workslips without having to return to the purchase order.

Titles to Go

Titles to Go uses Web services to query a vendor's database to see if a title is available. Web services are capable of bridging any operating system, hardware platform, or programming language allowing for a more smooth integration of the Polaris ILS with the various vendors' systems.

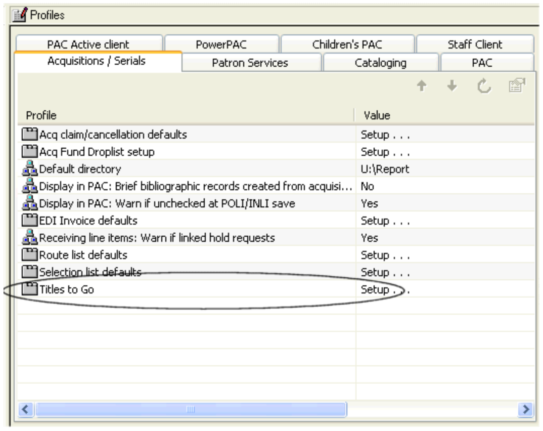
Before you use Titles to Go, do the following steps:

- ❑ Contact your Polaris Library Systems site manager and explain that you want to use Titles to Go.
- ❑ Contact your vendors to inform them that you are using Polaris Titles to Go. Write down the authentication information they give you, such as a username and password.
- ❑ In System Administration, select the **Titles to Go** profile at the System, Library and/or Branch(es) level, and enable Titles to Go for the suppliers. See "New Profile to Enable Titles to Go" on page 26.
- ❑ Ensure that the middle box of the SAN field in the Supplier record contains the correct SAN:
  - Baker & Taylor (B&T) - SAN is 1556150
  - Book Wholesalers, Inc. (BWI) - SAN is 1355449
  - Ingram - SAN is 1697978

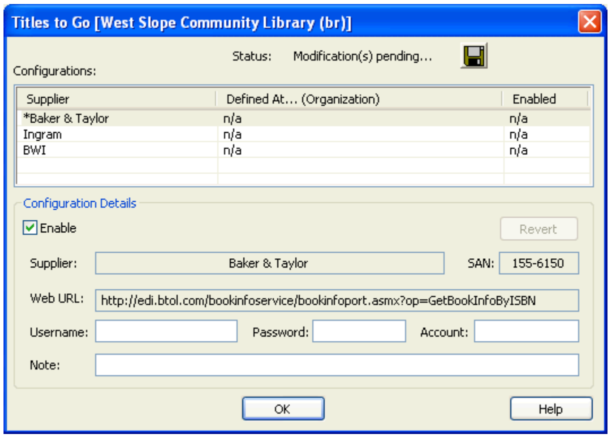


New Profile to Enable Titles to Go

A new Acquisitions profile in System Administration enables the Titles to Go service. Double-click **Titles to Go** in the list of Acquisitions/Serials profiles.

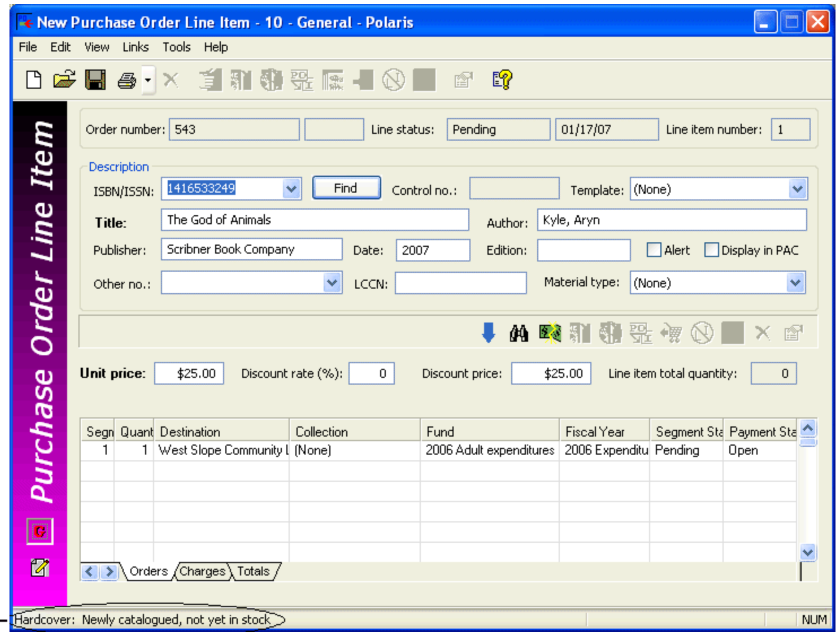


The Titles to Go profile dialog box appears where you enable the Titles to Go queries with your supplier. Click **Enable** and enter the authorization information the supplier gave you.



Using Titles to Go from the Purchase Order Line Item

Once Titles to Go is enabled for the supplier you are using, simply type the ISBN in the **ISBN** box on the Purchase Order Line Item workform, and press **Enter**. If the ISBN you entered does not match any records in the local database, the query is launched. If a matching ISBN is found in the supplier's database, the bibliographic data, price, discount, availability, and binding format appear in the Purchase Order Line Item workform. If it does not find a match, an error message appears.



binding format & availability

Enter the quantity, destination, collection, and fund information for the various copies of the title, and save the purchase order line item. A brief bibliographic record is created and saved in the local database.

Improvements to the Printed Purchase Order

Purchase Order Line Item ID on Printed Purchase Orders

The purchase order line item ID was added to the printed purchase order so that vendors can also print this number on their invoices or packing slips. If this number is included for each title on an invoice, you can use Rapid Receipt most efficiently.

Other Changes to the Printed Purchase Order

The total quantity ordered and the total price of the purchase order are printed at the top of the purchase order. If there are no supplier instructions, the Supplier Instructions fields do not print, reducing the number of pages. Other alignment and labeling changes were made to make the printed purchase order more useful.

Books, Inc.

SAN:

Account Number: 2000

2002 West Main Street SYRACUSE NY USA 13210 1-800-555-5555

Purchase Order: 545 2007

Ship To: West Slope Community Library
3678 SW 78th Street
Portland, OR 97225

Bill To: West Slope Community Library
3678 SW 78th Street
Portland, OR 97225

Date Ordered: 1/22/2007
Tax Exemption No.: Tax#453405
Total Amount: $444.09
Total Quantity Ordered: 20

Please supply the following item(s):

Qty	ISBN/ISSN	Title/Author	Line ID	Other No.	Material Type	Est. Disc Rate	Unit Price	Total Amount
1	0140151079	The portable nineteenth-century Russian reader /	159830		Books	30.00 %	$10.00	$7.00
1	0151495998	Lectures on Russian literature / Nabokov, Vladimir Vladimirovich, 1899-1977.	159850		Books	30.00 %	$10.00	$7.00
1	0151832781	Writers in Russia, 1917-1978 / Hayward, Max.	159836		Books	30.00 %	$10.00	$7.00
1	0226137589 (alk. paper)	Slavic excursions : essays on Russian and Polish	159840		Books	30.00 %	$10.00	$7.00

Miscellaneous Invoice Unlinked to Bibliographic Records

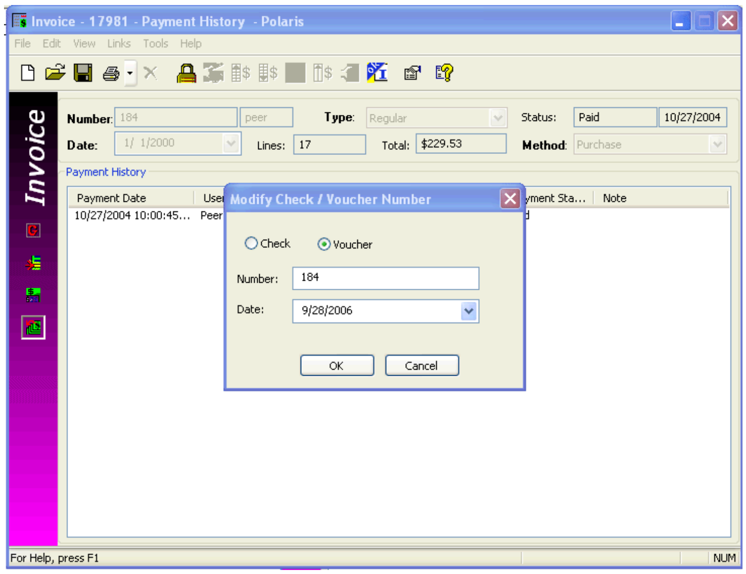
You can use miscellaneous invoices to track library expenditures that are not directly linked to specific bibliographic records. When you enter an invoice line item in a miscellaneous invoice, you do not search for and select a bibliographic record. Instead, you type a description of the charge in the **Title** box, but no brief bibliographic record is created.

A supplier is not necessary in a miscellaneous invoice, but each segment must have a quantity, destination, and fund. Miscellaneous invoices may have multiple line items with multiple segments for different destinations. You can search for miscellaneous invoices in the Find Tool by selecting **Type** in the **Limit by** box and **Miscellaneous** in the **Value** box.

You can pay a miscellaneous invoice, or you can credit the whole invoice without paying it.

Modifying the Invoice Payment History

You can modify the date as well as the check or voucher number for a paid invoice. On a paid invoice, right-click the line for which you want to modify the check/voucher number, and select **Modify Payment History**. The default payment type is set to **Voucher**, but you can select **Check**. You can change the voucher or check number and the paid date.



Check/Voucher Number Field Expanded

You can enter up to 30 characters for a check or voucher number. Previously, the field only allowed the entry of 12 characters.

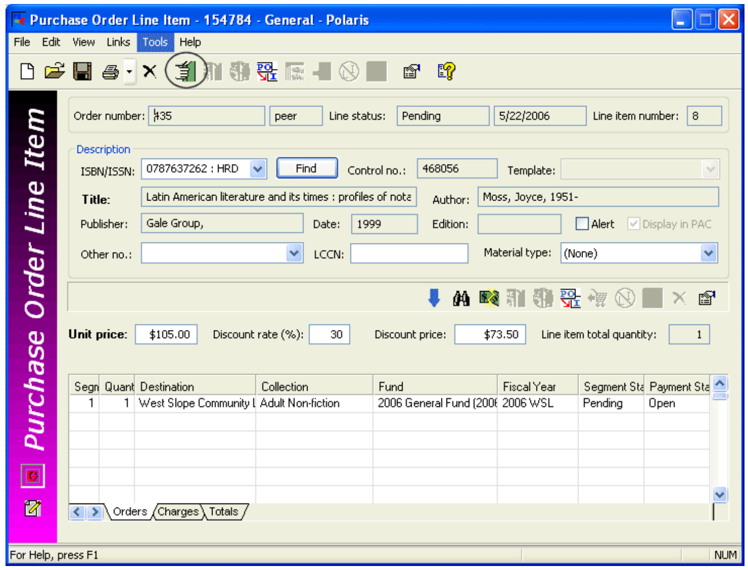
Place Holds from Purchase Orders Line Items

You can place bibliographic-level holds from the Purchase Order workform, Line Items view or from the Purchase Order Line Item workform if you have the Circulation permission to place a hold.

- From the Line Items view of the Purchase Order workform, right-click the line item and select **Place Hold** from the context menu.
- From the Purchase Order Line Item workform, select **Tools, Place Hold** from the menu.

Tip:

Click  to place a hold.



Cancel PO Line Items With Holds on Linked Items

When you cancel a purchase order or multiple purchase order line items, a message box appears if any of the linked items have holds that cannot be fulfilled by any other item.

Undo Receipt of Purchase Order Line Items and Retain Holds

If you place a hold from a purchase order line item, a hold is placed on the linked bibliographic record. If you receive the purchase order line item and then undo receipt, the purchase order line item’s status goes back to On order, but the hold request remains.

Delete Segments Without Saving Purchase Order Line Item

You can now delete purchase order line item segments without having to save them on the Purchase Order Line Item workform before deleting them.

Multiple ISBNs/ Other Numbers in Purchase Order Line Item

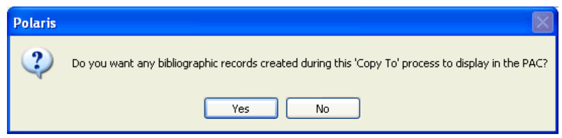
If there are multiple ISBNs in a bibliographic record linked to a purchase order line item, you can change the selected ISBN after the line item has been saved. You can also select a different number in the **Other No.** field if the linked bibliographic record contains multiple UPCs or other numbers that identify non-print items.

Notify Patrons of Canceled Holds on On-order Items

If a hold is placed on an on-order item, and the purchase order is canceled, a notice can be sent automatically to the patron if you set the option in Notification Options. See "Cancelled Request Notices" on page 95.

Set Display in PAC Option for Copied Selection List Line Items

When you copy selection list line items to a purchase order and new bibliographic records are created as a result, you can choose if you want the newly-created brief bibliographic records to display in the PAC.



Over-expend Funds

You can overexpend funds if you have the permission **Pay invoice exceeding fund expenditure limits**. If you are prepaying a purchase order or paying an invoice that will result in the fund limits or the free balance being exceeded, a message appears indicating that the free balance or expenditure limits were exceeded. If you have the permission, you can click **Continue** to continue paying the invoice. You can also overexpend from the Fund workform if you have this permission.

Bulk Adding to Purchase Order or Selection List

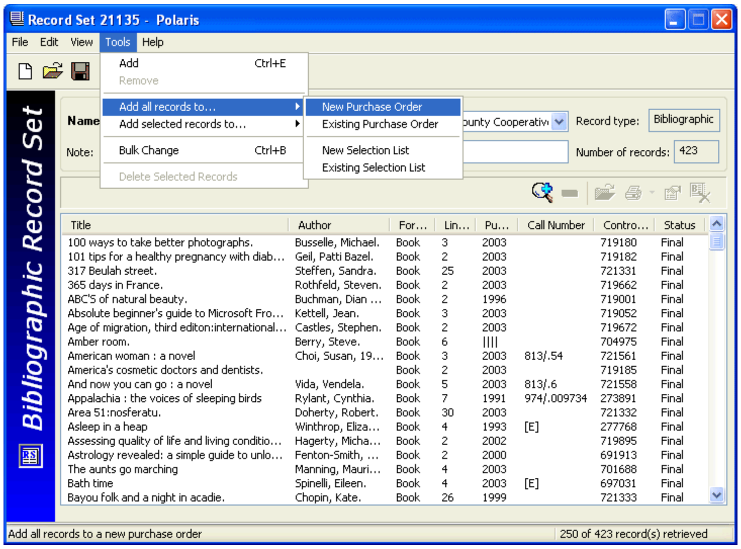
Several changes were made to the bulk adding process.

Tools Menu on the Bibliographic Record Set

The Tools menu on the Bibliographic Record Set workform has the following options for bulk adding records:

- To add all records in the record set to a purchase order, select **Add all records to New Purchase Order** or **Existing Purchase Order**
- To add all records in the record set to a selection list, select **Add all records to New Selection List** or **Existing Selection List**.
- To add specific records in the record set to a purchase order, select the records in the list, and choose **Add selected records to New Purchase Order** or **Existing Purchase Order**.

- To add specific records in the record set to a selection list, highlight the records in the list, and choose **Add selected records to New Selection List** or **Existing Selection List**.



Bulk Add Default Line Item When 970 Tags Processed

You can bulk add bibliographic records that were already bulk added to other purchase orders and have 970 tags marked as processed ($9 processed date/time). If the bibliographic record has 970 tags marked as processed, one line item segment is created on the purchase order or selection list using the default data you set in the Add to Selection List or Add to Purchase Order dialog box.

Note:
For default data to be used, the Acquisitions parameters **Bulk Add to PO: Replace invalid fields with default data** or **Bulk Add to SL: Replace invalid fields with default data** must be set to **Yes** in Polaris Administration.

Indicator for Records Bulk Added to Selection Lists

When bibliographic records are bulk added to selection lists, the 970 tags are marked as processed **($9 Processed [Date/Time]** if the parameter, **Bulk Add to PO/SL: Mark 970 data as processed** is set to **Yes**. Previously, this parameter was named **Bulk Add to PO: Mark 970 data as processed** and applied to purchase orders only.

Alert for Multiple ISBNs

You can set a System Administration parameter so that an alert appears when a purchase order line item is linked to a bibliographic record with multiple ISBNs. If you set the parameter, **Bulk Add to PO: Add Alert to PO line**

item for multiple ISBNs to **Yes**, the purchase order line items will have the **Alert** box checked, and they will appear in the Purchase Order - Line Items view with the alert icon.

Releasing a Purchase Order

- A message box appears if the linked bibliographic record is missing an ISBN or if the **Display in PAC** setting is off (unchecked). You can change the setting to **On** right from the message box if you have permission to modify the linked bibliographic records, **Modify a bib record from acquisitions and serials: Allow**.
- When you release an order by selecting **Tools, Release**, a message box appears where you have the option to select **Prepay** or **Pay on receipt of invoice**. If you select **Prepay** and there is not enough money in the fund to cover the purchase order line item or segment, you have the option of over-expending the fund if you have the required permission.

Closing Partly Received Purchase Orders

If the status of a purchase order is **Partly Received**, and all the line items are are either closed, cancelled or received, you can change the purchase order status to **Closed**. Select **Tools, Close** or click .

Purchase Order Line Item Workslips

- The workslips are sorted in title order, ignoring any initial articles in the title. This makes it easier to match the workslips to your received items. Previously, initial articles were included in the title sort.
- When there is a hold placed on a bibliographic record that is linked to a purchase order line item, the **Holds** check box will be checked on the purchase order line item workslip.
- If there are item records linked to the purchase order line item, the information from the line items is displayed in a grid format, including the circulation status.
- If there are no item records linked to a purchase order line item, the information from the purchase order line item segments is displayed in grid format.

Printed Voucher

You can print an invoice summary or the detailed voucher. From the Invoice workform (with a status of Paid), select **File, Print, Invoice Voucher (Summary)**, or **Invoice Voucher (Full)**. The invoice voucher appears in the Report Preview window. If you selected **Invoice Voucher (Summary)**, the voucher displays only the fund totals and the grand totals. If you selected **Invoice Voucher (Full)**, each line item is displayed.

On-order Item Templates

- You can name an on-order item template with or without the hyphen (**on-order** or **on order**).
- When an item template has a name that begins with "on-order," (or on order) all required fields for creating an on-order item must be filled in before you can save the template. This ensures that on-order item templates contain all the information necessary to create item records automatically upon release of a purchase order.

On-order Bibliographic Templates

When you manually enter title information on the Purchase Order Line Item workform, and select an on-order bibliographic template from the **Template** box, the MARC tags from the template, such as the 008/22, 245 $h, and the 006/007 tags, will be retained in the new bibliographic record. The brief bibliographic record will contain these tags (if they are in the template) as well as the information you entered in the purchase order line item.

Previously, the information entered in the Purchase Order Line Item workform overwrote certain data in the template. Therefore, if you had a 008/22 or 245$h in the on-order bibliographic template, it was overwritten by the title information in the Purchase Order Line Item workform.

Linking from Bibliographic Records to Acquisitions Records

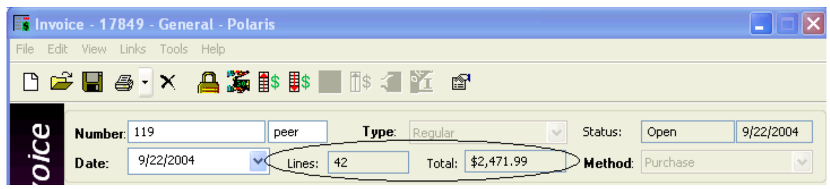
You can link from a bibliographic record (displayed in the Find Tool results list or the Bibliographic Record workform) to a purchase order, invoice, or selection list.

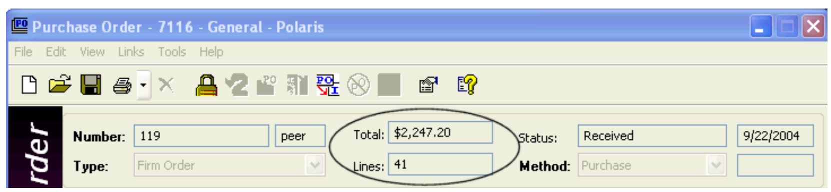
Set Aside Funds as Unavailable for Expenditures

If you want to prevent staff from using certain funds for expenditures, you can set up the fund so that it does not display in the list for purchase order line item segments, selection list line item segments, or invoice line item segments.

Number of Lines and Total Dollar Amount Displayed

The total number of lines and the total dollar amount display in the header on the Invoice and Purchase Order workforms. These totals also display in the Find Tool results when you search for purchase orders or invoices.



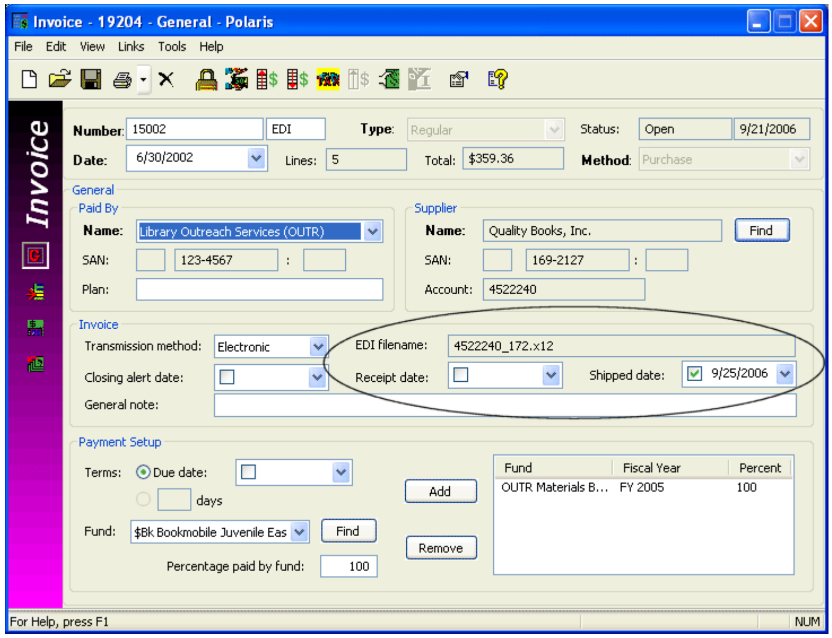


Selection List Includes Author as a Column Header

You can view the author in selection list titles, and you can click the Author heading to sort selection lists by author.

More Data on EDI Invoices

EDI invoices are created using data retrieved from the supplier's server. The General view of the EDI Invoice contains the EDI filename field, the transmission method is set to **Electronic** and the **Shipped date** is set to the date in the EDI file (DTM02). Some suppliers may not include the shipped date in their electronic invoices.



EDI Invoice E-Mail Contains Holds Information

If there were bibliographic-level holds placed on materials that were ordered via EDI, the e-mailed invoice log contains the holds information. This is useful if your library has chosen to automatically set purchase order line items to Received when an EDI invoice is created.

This is an example of the information that appears in the log:

The following bibliographic records have hold requests placed against them:

Invoice No.	Invoice Line No.	Bib Control No.	Title	No. of Holds
34439474	2	3400	I Know My ABC's	2

Supplier Record

- **Serials claiming** - The **days after released** field is now the **days after released/expected** field, and the **Notice method** box was added.
- **EDI** - When you enter a password for EDI, it is not displayed in the Supplier workform.

Lock List View Button

The Selection List, Purchase Order and Invoice workforms include a lock list view button . You can click the button to keep your place as you work in the Line Items view of the workform.

Claim Alert List

The Claim Alert List opens to display claims for monographic items if you access it from Acquisitions. If you access the Claim Alert List from Serials, you will see claims for serial issues or parts. See "Serials Claiming" on page 55.

Preview Bibliographic Usage Statistics

When you right-click on a bibliographic record in the Find Tool results, and select Preview, you can see a quick preview of the items linked to the bibliographic record and the usages statistics. These statistics can aid in decisions about ordering additional copies. See "Preview Usage Statistics from a Bibliographic Record" on page 45.

Supplier Performance Report

The Supplier Performance Report shows the fill rate for a supplier. It shows the number of items ordered, received, claimed and canceled. Select the library or branch for which you want to see the supplier data, and select the date range.

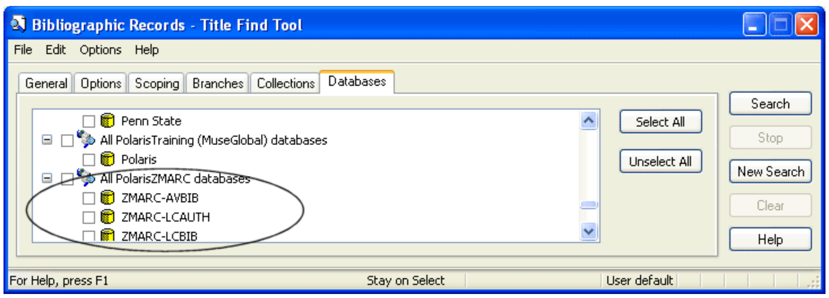
Cataloging

Polaris 3.3 offers the following enhancements to Cataloging:

Polaris ZMARC Bibliographic and Authority Databases

Polaris Library Systems offers subscriptions to the Polaris ZMARC databases that give you access to over 11 million bibliographic records and 7 million authority records cataloged by the Library of Congress. In addition, your library can access over 250,000 audio and video titles made available through Baker & Taylor's A/V Access database.

If you want to use Polaris ZMARC, contact your Polaris Site Manager who will help you set up ZMARC. Once the Polaris ZMARC databases are set up as Z39.50 targets, you can search them like any other remote databases by selecting them on the Databases tabbed page of the Polaris Find Tool. When you find the records you want in a ZMARC database, you can save them as final records in your local Polaris catalog.



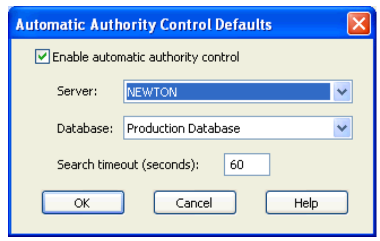
Automatic Authority Control

If you subscribe to the Polaris ZMARC authority database, you can specify the database as a source of authority records for automatic authority control. With automatic authority control, you can check headings on bibliographic or authority records, and the system automatically searches the ZMARC (or OCLC) authority database for matching authority records if none were found in the local database. If a match is found in the ZMARC authority database, it is saved to the local database and the link is made to the existing record.

New Cataloging Profile for Defining Databases

To use automatic authority control you must have a subscription to the Polaris ZMARC authority database or OCLC database. Then specify the Z39.50 server and database to use for automatic authority control. If you want to use ZMARC, contact your Polaris Site Manager. When the database is enabled, the server and database will be used to find a matching authority record if none is found in the local database.

In System Administration, select the Cataloging profile **Automatic authority control** and a dialog box appears where you enable automatic authority control, specify the server, the database, and the search timeout in seconds.



Automatic Authority Updates

To maintain your authority records, you can subscribe to Polaris Automatic Authority Updates. Polaris Library Systems installs a job at your site that tracks the authority records you have, and the weekly updates from the Library of Congress are scanned for matches to your records. If there are updates to your records, an e-mail is sent out with the location of the authority file and the number of records contained in the file. You receive only updated authority records that match authority records you already have in your local database.

After you receive the e-mail, you can import the Polaris authority record file using the import profile **Authority Update Import**. When the file is imported, the authority records in your database are updated automatically, and the bibliographic records are relinked as necessary. If you want to use ZMARC automatic authority updates, contact your Polaris Site Manager. You will need to provide the e-mail address of an administrator to notify when an authority update file is downloaded.

Authority Control for Remote Records Add to Record Sets

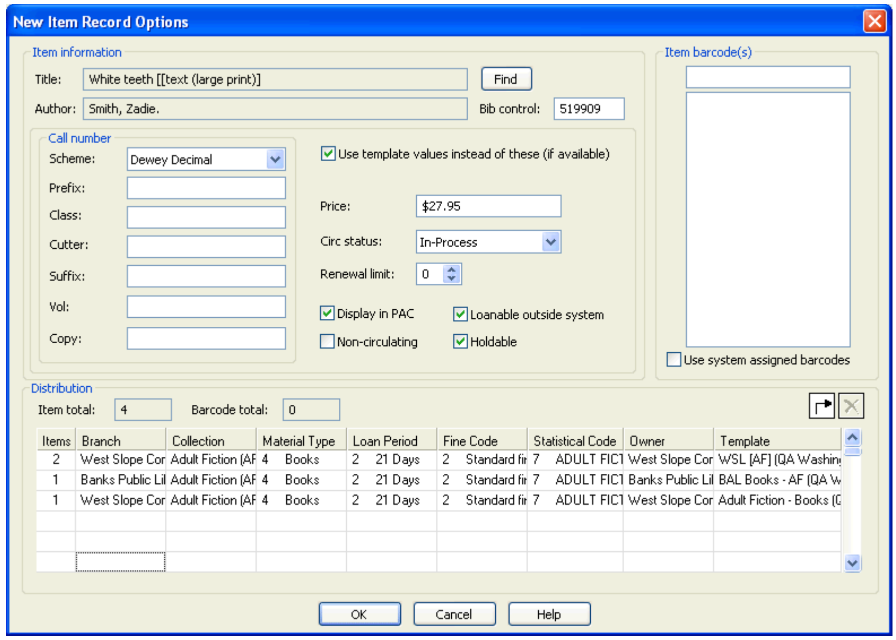
You can search for and save bibliographic records from remote databases from a record set. Previously, no authority matching was done to try to link these new bibliographic records with authority records already in the database. Now, if you add a bibliographic record from a remote source to a record set, the headings are checked against the authority records in your local database. If there is a match for the bibliographic record’s heading, the link is made. If no match exists in the local database, the system does not initiate a search for an authority record in the Polaris ZMARC authority database, even if you have a subscription to Polaris ZMARC. The linking is done only with authority records in your local database.

Creating Multiple Items Simultaneously

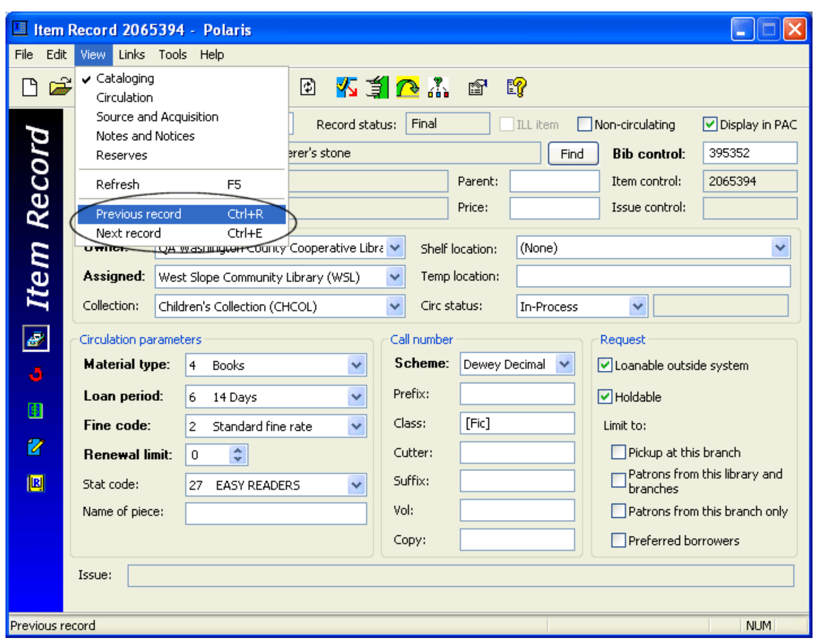
You can create multiple items for the same title simultaneously using the New Item Record Options dialog box. You open the dialog box from the Bibliographic Record workform, the Item Record workform, or the New dialog box. Use the Find Tool to search for the bibliographic record, enter common information for all the items in the top part of the dialog box and enter the item barcodes. Then, in the bottom grid section of the dialog box, enter the number of copies for each destination/collection, either select a template to create each item, or select the values in each column, and enter a number of copies. If you use templates, you can select **Use template values instead of these (if available)** to use the values in the templates for the following fields and settings in the new item records:

- **Price**
- **Circ status**
- **Renewal limit**
- **Display in PAC**
- **Non-circulating**
- **Loanable outside system**
- **Holdable**

If you select **Use template values instead of these (if available)**, but the Item Record Template does not have a value in the **Price, Circ status, or Renewal limit** field, the value from the New Item Record Options dialog box is used. The settings (checked or unchecked) for **Display in PAC**, **Non-circulating, Loanable outside the system** or **Holdable** are always taken from the template if **Use template values instead of these (if available)** is checked.



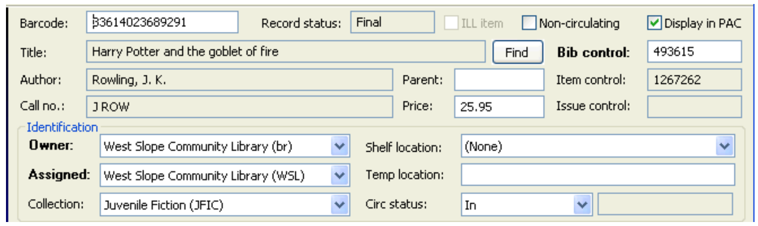
When the items are created, a list box appears showing a summary of the items you created. You can open the Item Record workform for one of the newly-created items, and then use the **Previous** and **Next** options from the **View** menu to go through all the items in the list and view them in the Item Record workform. The **Previous** and **Next** options are available only when you open the Item Record workform from the list of items. If you want to quickly edit the records in the list box, open the first one and edit it, then press **Ctrl + S** to save it and **Ctrl + E** to go to the next one.



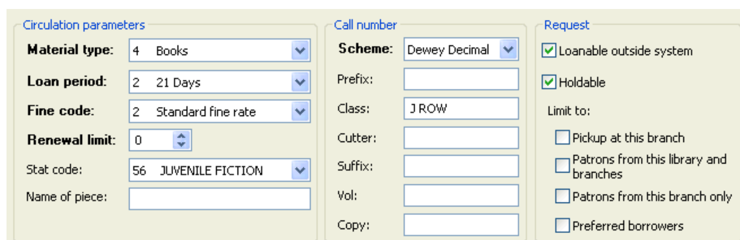
Redesign of the Item Record Workform

The following changes were made to the Item Record workform:

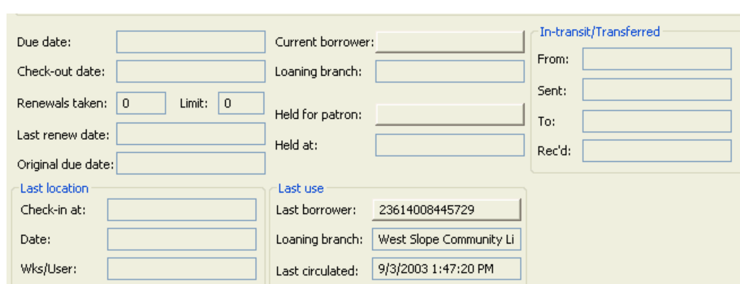
- The item record workform header was expanded to include more information. The fields in the header remain at the top of the workform for all the views of the item record.



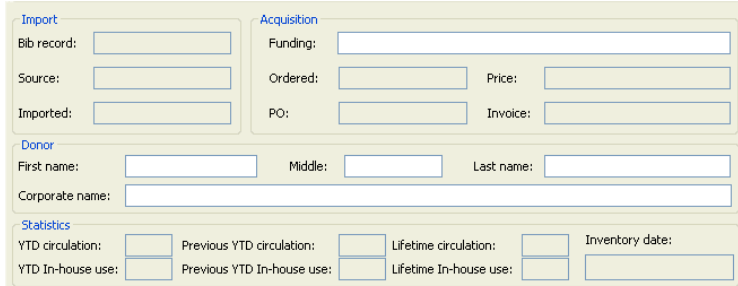
- All fields associated with cataloging are in one view and the item record opens to this view when you access the record from a Cataloging function.



- The circulation data is contained in the Circulation view which opens when you access the item record from a circulation task.



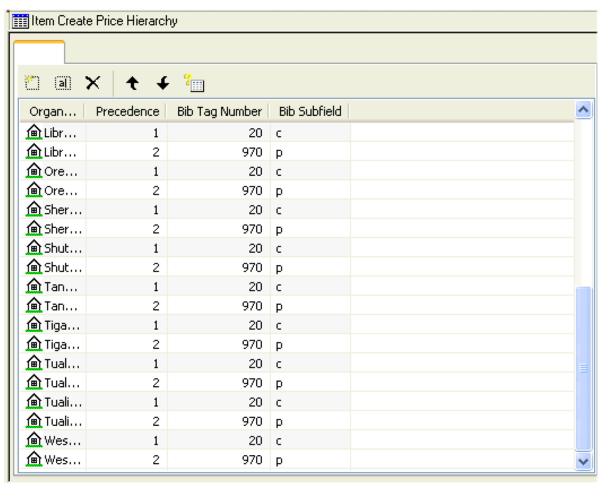
- When you link to the item record from a purchase order line item or invoice line item, the Item Record workform opens to the Acquisition Source view.



- Some field names were shortened.

Price in Item Record from Linked Bibliographic Record

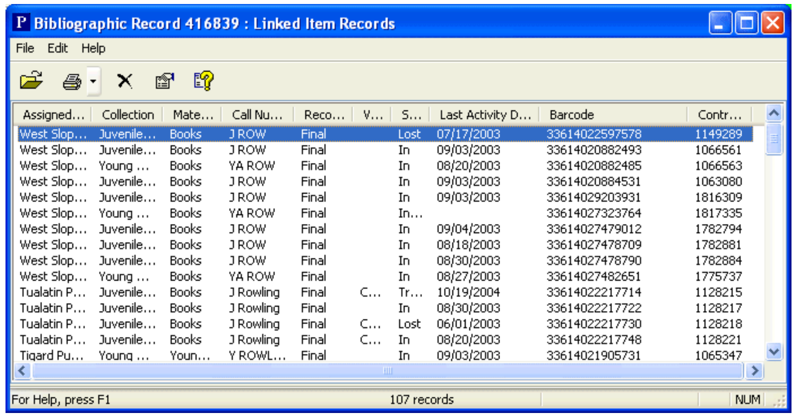
If a bibliographic record contains a price, it is copied to any linked item records and appears in the **Price** field on the Item Record workform. The system looks for the price in specific tags and subfields of the bibliographic record, according to the order in the Item Create Price Hierarchy database table in Polaris Administration. If you have the System Administration permission **Modify item price hierarchy table** you can add tags and subfields to the list, delete tags and subfields from the list, or change the precedence in which the fields are checked for the price. See "Working with Tables" (Polaris Administration topics) in staff client online Help.


Item Create Price Hierarchy

Organ...	Precedence	Bib Tag Number	Bib Subfield
Libr...	1	20	c
Libr...	2	970	p
Ore...	1	20	c
Ore...	2	970	p
Sher...	1	20	c
Sher...	2	970	p
Shut...	1	20	c
Shut...	2	970	p
Tan...	1	20	c
Tan...	2	970	p
Tiga...	1	20	c
Tiga...	2	970	p
Tual...	1	20	c
Tual...	2	970	p
Tuali...	1	20	c
Tuali...	2	970	p
Wes...	1	20	c
Wes...	2	970	p

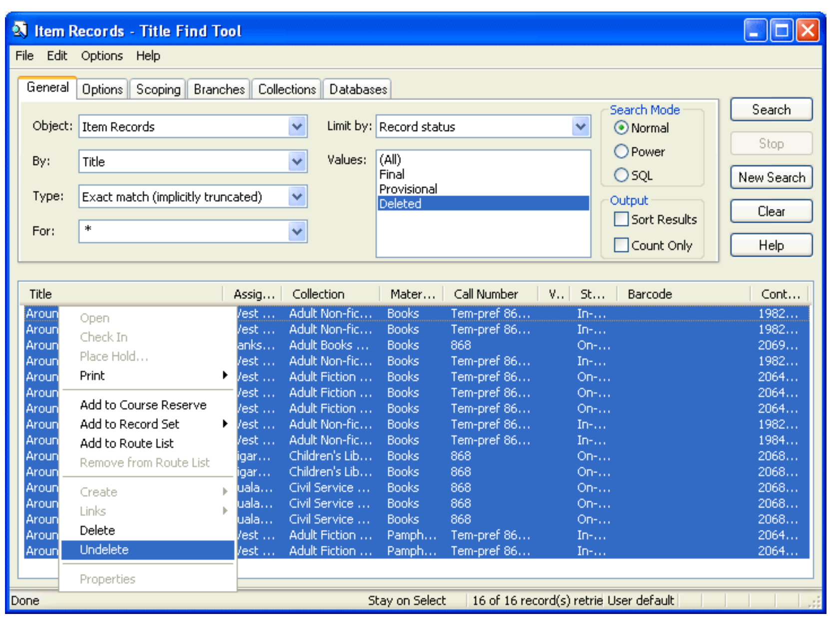
Linking to Item Records for the Same Bibliographic Record

From an open item record, you can link to existing item records that are linked to the same bibliographic record. Select **Links, All Items** or click to display a list of all the other items linked to the same bibliographic record. You can select an item record in the list, and open it in the Item Record workform. To see the other item records displayed in the Item Record workform, leave the workform open, and select another item in the list. The information in the open workform changes to reflect the item you selected.



Undelete Item Records Previously Marked as Deleted

You can select multiple item records with a status of deleted, and restore them to a status of **Final** in one step. In the Find Tool results list or in a record set, multi-select the item records with a status of Deleted, right-click and select **Undelete** from the context menu. Any non-deleted items will be skipped, and the process will continue until all the selected records have been processed. A single relink dialog box will come up when the undelete process is successful.



Preview Usage Statistics from a Bibliographic Record

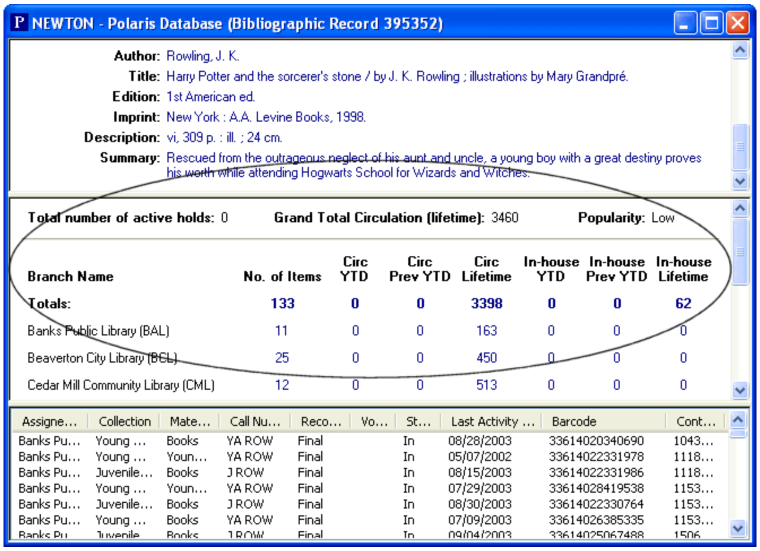
You can select a bibliographic record in the Find Tool results list, right-click and select **Preview** to open a window with three different panes. The top pane displays the brief bibliographic view.

The middle pane displays the useage statistics for the items linked to this bibliographic record, including the total number of items, the year-to-date circulations, the previous year-to-date circulations, the lifetime circulations, and the in-house use. Below the totals is a list of the items and circulations by branch.

Important:
The **Circ YTD**, **Circ Prev YTD**, **In-house YTD**, and **In-house Prev YTD** columns display **0** until the Circ rollover counts job runs for the first time in 3.3.

The middle pane also displays the popularity of the title as **High**, **Medium**, or **Low**, based on the number of circulations and holds. The titles with a popularity of high have circulated and had holds placed on the linked items within the last 40 days. The titles that have a popularity of medium have linked items that either circulated or had holds placed on them within the last 40 days. The titles that have a popularity ranking of low have not had any linked items circulated or held within the last 40 days.

The bottom pane of the window lists all the item records that are linked to this bibliographic record. You can double-click on an item in the list to open it in the Item Record workform, or you can right-click and perform various functions on the item record using the context menu.



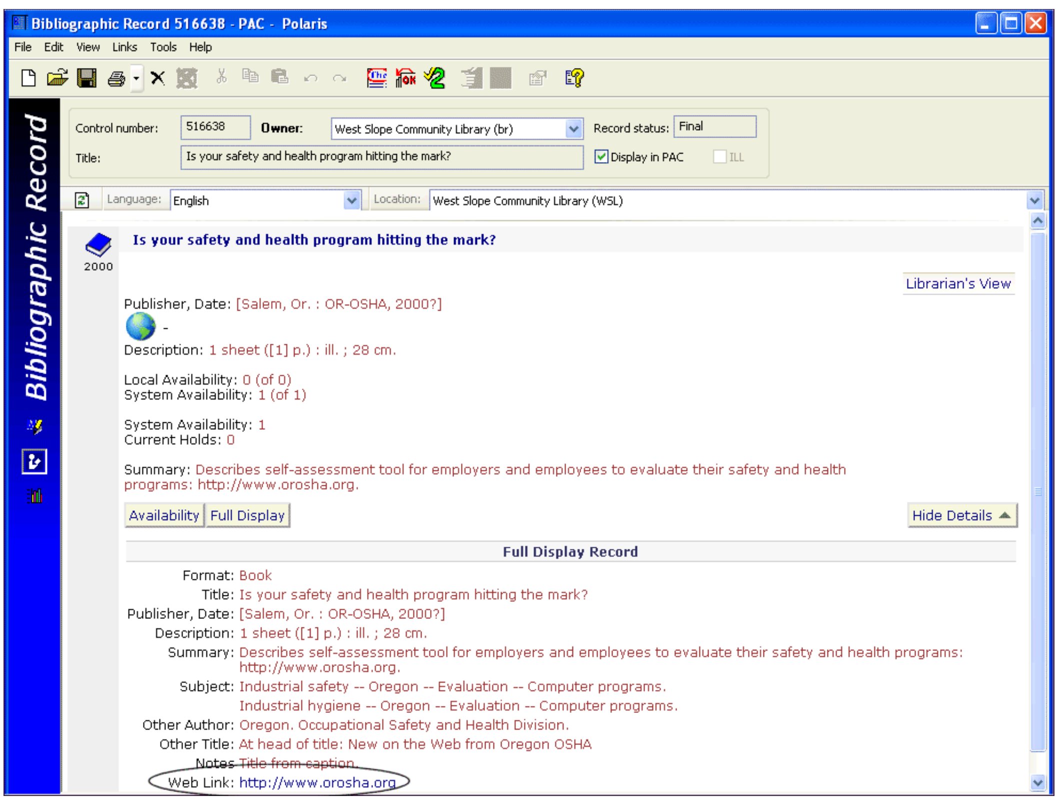
You can also select **Tools, Show Usage Statistics** from the Bibliographic Record workform to see the lifetime circulation statistics and lifetime in-house count, which are the cumulative totals for all linked items' circulations. This count also appears in the Bibliographic Record workform - Statistics View and the Bibliographic Record Property page.

PAC View from the Bibliographic Record Workform

When you select **View, PAC** from the Bibliographic Record workform, the PAC display appears within the Bibliographic Record workform. The record appears as it does in the PAC when patrons search for the title, and it includes all the settings specified in your library's PowerPAC profile **Title Display: Configure**. See "Customizing Search Results Data" on page 133. Some tasks that are possible for patrons to do in the PAC are disabled in the PAC view.

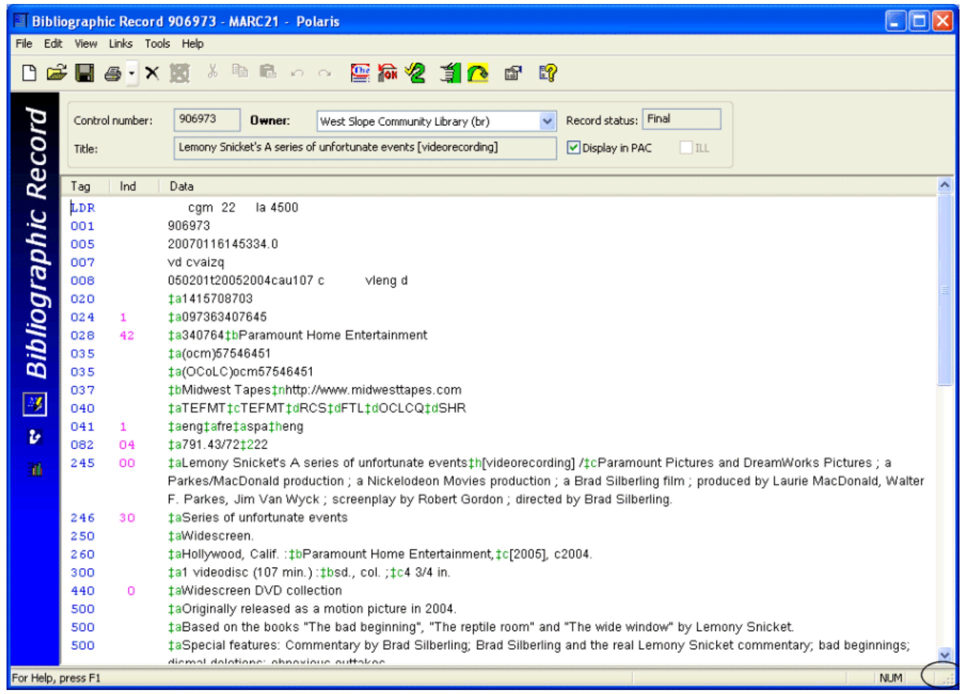
Active URL Links in PAC View

If the bibliographic record contains a URL, it is an active link when you select **View, PAC** from the Bibliographic Record workform. You can click the link to go to the Web site.



Expand the Workforms

You can expand the Bibliographic, Authority record, and Record Set workforms to see more data. Drag the bottom, right-hand corner of the window to expand the workform.



Creation Date on Property Sheet

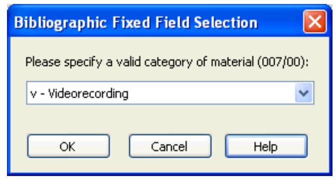
The property sheets for the Bibliographic Record and Authority Record workforms display the date the record was added to the Polaris database. Previously, the creation date in the 008 field of the bibliographic or authority record was displayed on the property sheet.

Diacritics and Display Description on Tools Menu

The **Tools** menu on the Bibliographic Record workform contains the **Diacritics** and **Display Description** options, which were previously available only from the context menu. The Diacritics menu option displays the Character Picker dialog box where you can choose international characters and diacritical marks.

Entering Data for the 006 and 007 Fixed Fields

When you are entering information in the 006 or 007 fixed fields, you can double-click the tag or press **Ctrl + E** to display the Bibliographic Fixed Field Selection dialog box where you select a form or category of material.



After you click **OK** on the Bibliographic Fixed Field Selection dialog box, another dialog box appears where you can enter more specifics regarding the material. The dialog box that appears depends on the entry you choose in the Bibliographic Fixed Field Selection dialog box.

Linking to Authority Records from Bibliographic Headings

In the Bibliographic Record workform, MARC 21 view, you can double-click on a heading or press **Ctrl + E** and link directly to the authority record for that heading.

Primary Title in Bibliographic Record

If the bibliographic record does not contain a 245 tag, the primary title is pulled from the Uniform Title (130 tag).

Permission Message Appears Only When Updating Records

If you have access permission to a Cataloging record without the permission to modify it, the message that you cannot update the record will appear only if you attempt to modify it, not when you simply access the record.

Changes to Labels

- When you make changes to the label setup in the Label Manager from the Shortcut Bar, the changes are no longer limited to that session. Any changes you make from the Label Manager also update the corresponding settings in your staff-level label profiles in Polaris Administration, so they remain when you log back into Polaris.
- For terminal server and hosted environments, you can define where label files are saved using the new Staff Client Polaris Administration profile **Label: Data file path** at the staff and workstation levels. If you do not define a data file path, the files will still be saved to the session profile folder. Previously, all label data files (.dat files) were saved to the **$/Documents and Settings** folder under the current logon user's profile **Application Data\GIS\Polaris <VERSION#** by default.

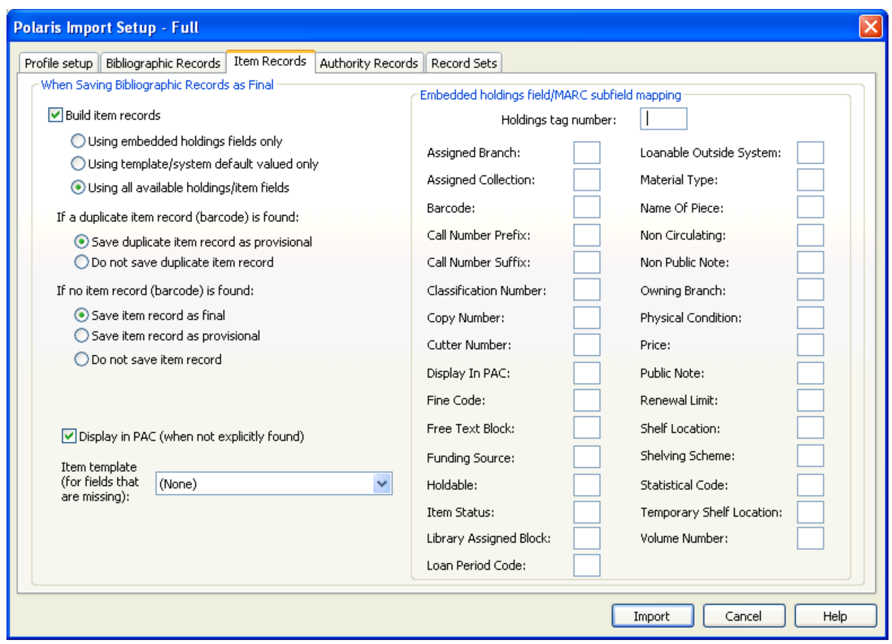
Importing Cataloging Records

The following changes were made to the import process in Cataloging:

New Options on the Item Record Tab

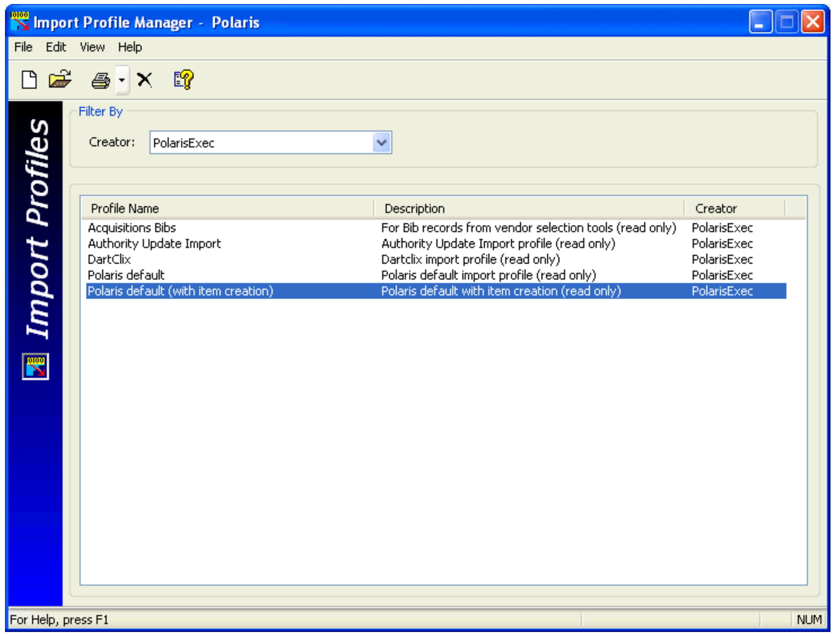
On the item tabbed page of the import profile, you can specify the embedded holdings tag and the subfields to map to fields in item records. You can set up profiles with different settings, depending on where your vendor places holdings information and what information is included. To ensure that items are created with all the information you require, you can specify a template that will fill in any information missing from the holdings data.

If item creation is turned on, and you import a bibliographic record that has no embedded holdings (no 852 or 949 tags), a single item record will be created using system default information, or data from a template.

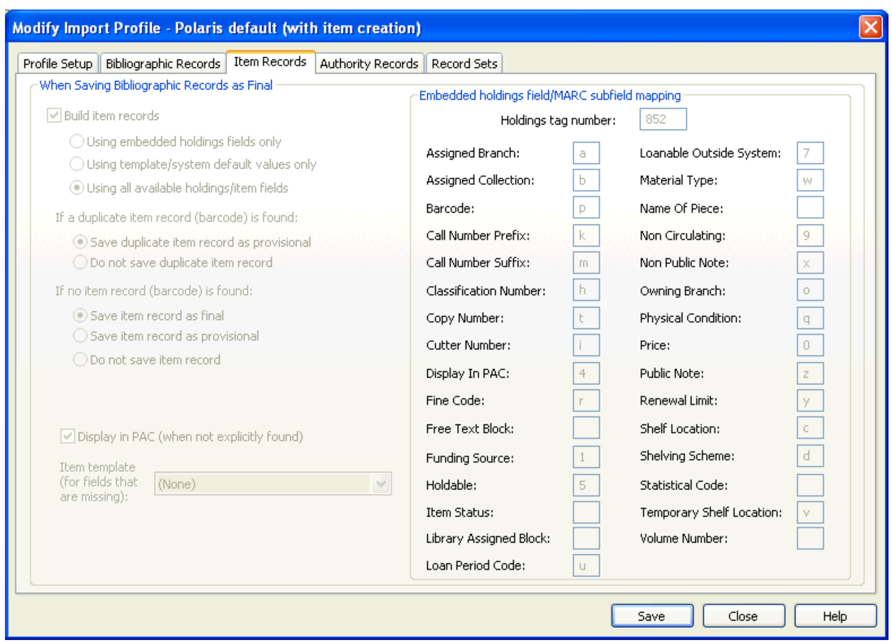


Default Import Profile for Creating Item Records

You can select a new default import profile that has the embedded holdings tag and subfields defined. This is a read-only profile, but you can copy this profile, change the settings and save your profile with a different name. You can set up several different profiles, depending on where the vendor stores the holdings data in its bibliographic records.

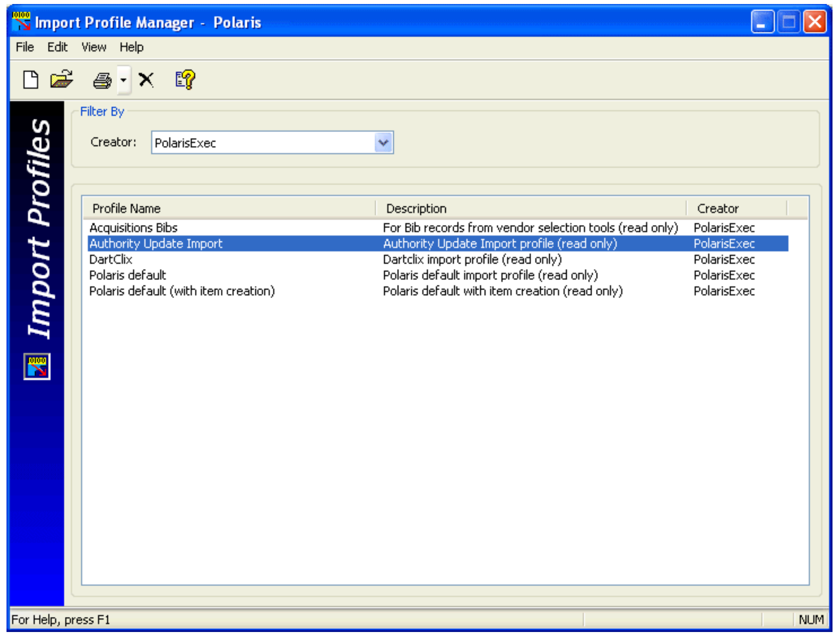


The default settings for the embedded holdings data are displayed in the appropriate fields on the Item Records tabbed page of the Polaris default (with item creation) profile.



Default Import Profile for Updating Authority Records

Use the Authority Update Import profile to import authority records to update your local authority records.



The default settings on the Authority Record tabbed page specify how authority records are imported and saved. Duplicate detection specifies that duplicate records should be merged. You cannot change the settings in this profile, but you can copy it and save it with a different name.

Choose Not to Display Imported Records in the PAC

When you import records, you have the option to clear (uncheck) the **Display in PAC** check box on the Item or Bibliographic tab. When the **Display in PAC** check box is cleared, the imported bibliographic records and the items created from them do not display in the PAC.

Deleted Records Added to Record Set

If your library retains deleted records, when a record is overlaid during the import process, the existing deleted record will be added to the deleted record set used in the Import process. Previously, only records that were newly imported as deleted were added to a record set. This process works for bibliographic and authority records.

Import Report Displays the Reason for the Duplicate

When the import process detects a duplicate, the import report gives the reason the record was identified as a duplicate. You can specify the text that displays when a duplicate is found, but it only applies to system-level rules. If custom rules are used, the abbreviated text for those rules is used.

New Deduplication Rules

These rules can be added to the system deduplication rules as well as the import profile deduplication rules.

1. UPC (tag 024 ind1 = '1') to UPC

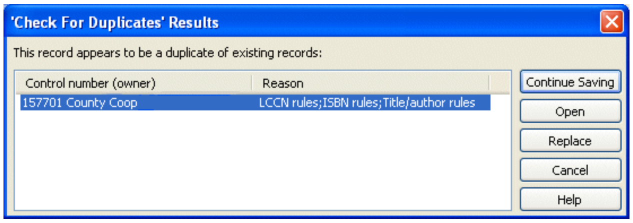
2. 024 $a (excluding ISBN and UPC) to 024 $a

3. 028 $a to 028 $a

4. 037 $a to 037 $a

Check for Duplicates Results Window Displays the Reason

When you save a bibliographic or authority record from another source and a duplicate is detected, a dialog box shows the reason the record was identified as a duplicate.



Retain Specific Types of Deleted Records

You can specify what type of deleted records you want to retain using the three Cataloging profiles in Polaris Administration: **Retain Authority Records, Retain Bibliographic Records,** and **Retain Item Records**. When records of the type specified are deleted, the records have a deleted status, but they are not removed from the database until a purge process is run.

LDR/07 and Type of Material

If the LDR/07 is “i” (integrating resource) in a bibliographic record, the type of material code (TOM) indicates a physical format of serials because it is a continuing resource.

Record Sets Display Unlinked Icon

If a record in a record set does not have links to other records, an icon appears next to the record.

Copying an Item Record and Circulation Status

When you copy an item record, its circulation status is also copied to the new item record unless the Cataloging profile **Copied item records default to In-process** is set to **Yes.** If this profile is set to **Yes**, the copied item records default to **In-process**.

Polaris Inventory Manager Creates Item Record Sets

When you do an inventory with Polaris Inventory Manager (PIM), item records are gathered into a record set automatically. The record set is named PIM_branch abbreviation_date_time. The note contains the call number range, and the owner is the branch that loaded the records.

Automatic Record Sets of Unlinked Cataloging Records

You can automatically create a record set of unlinked authority or bibliographic records. The bibliographic records in the record set do not have any links to item records and the authority records do not have any links to bibliographic records or other authority records. To create these automatic record sets, select **Utilities** on the Polaris Shortcut Bar, and select **Cataloging Processing, Create Unlinked Bibliographic Record Set** or **Create Unlinked Authority Record Set**.

New Authority Control Reports

- **Authority Records where 4xx matches 1xx** - Use this report to identify authority records where a *See* reference (4xx field) in one record matches a heading (1xx field) in another record in the database. It also lists situations where the same authority record contains a 1xx and 4xx that match because of normalization. For example, one field contains the heading using "and" while the other field contains the same heading using "&".
- **Problem Authority Headings** - Use this report to identify possible duplicate authority headings where the normalized text is the heading of more than one authority record. It lists the normalized heading that matched, the authority record IDs, the actual heading text, and the thesaurus of the authority record.

New Item Record Reports

- **Item Records Grouped by Funding Source and Statistical Code** - This report lists items added within a certain time frame grouped by fund and then by statistical code. You select the branch, the begin date, and the end date. The funding source comes from the Source and Acquisition view of the Item Record workform. If you use Polaris

Acquisitions, the information comes from the purchase order linked to the item record. Under the funding source is the statistical code for the item.

- **Item Records That Do Not Display in the PAC -** Lists the item records that have the **Display in PAC** box unchecked so they will not display in the public access catalog.
- **Item Records Without Barcodes -** Lists the item records that do not have barcodes.
- **Collection Value by Organization** - Shows the value of the collections in your organization or the organizations you choose. The value of each collection is totalled and a grand total of all the collections in your organization is displayed at the bottom of the report. It also displays the number of items that are not included in the totals because there is no price in the item record.

Authority and Bibliographic Search Index Tables

The Authority Search Index and Bibliographic Search Index tables no longer display in Polaris Administration. These tables were read-only.

Serials

Polaris 3.3 includes claiming for serial issues and parts among the enhancements for Serials.

Serials Claiming

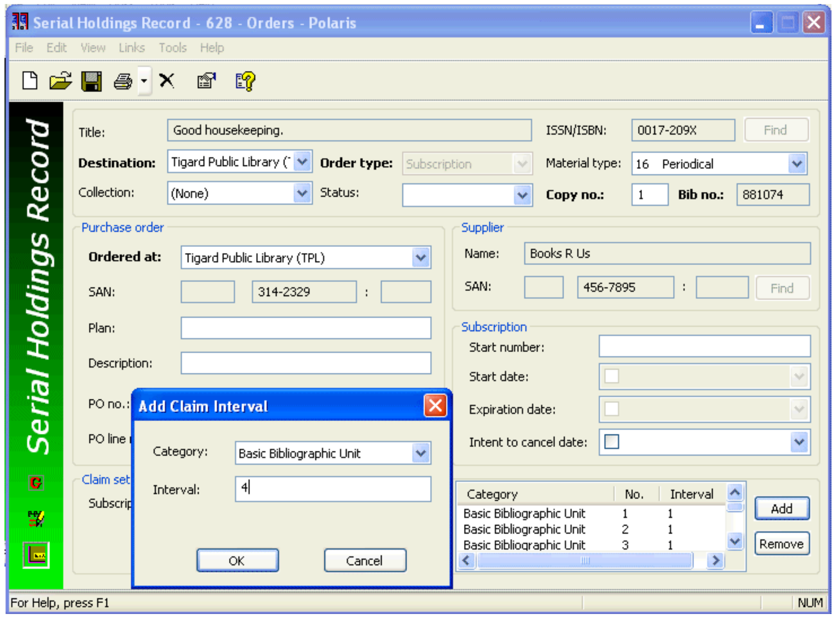
You can now claim serials issues when the issues have not been received as expected. This may be because the issue did not arrive according to its predicted frequency and no notice was received from the supplier, or the wrong issue or a damaged issue was received.

Before you can generate claim notices for serials claims, you must specify whether you want claiming to be automatic or manual. Then you set the notification method (e-mail or print), and specify the text to appear on the e-mailed or printed notice. These settings are on the Notification Options dialog box. See "Serial Claim Notices" on page 96.

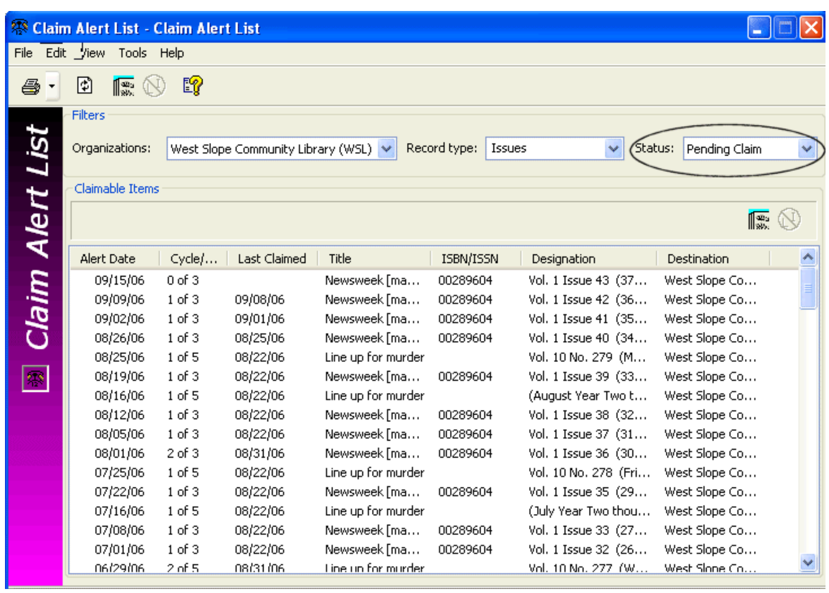
If you have selected automatic claiming, all issues that have not been received by a specified time period after the expected arrival date are changed to a claimed status, and notices are automatically generated via the overnight claim job. If the notification method is e-mail, the notices are queued in the e-mail manager and are sent out in batch with your other e-mails. If the notification manager is print, the notices are generated, but you must print them from **Reports and Notices** under **Utilities** on the Shortcut Bar.

If you have left the automatic claiming box unchecked, all serial issues that have not been received by a specified time period after the expected arrival date appear on the Claim Alert List. You manually claim the serial issues from the Claim Alert List and the claim notices are generated one by one as either e-mail files or notices for print, depending on your selection.

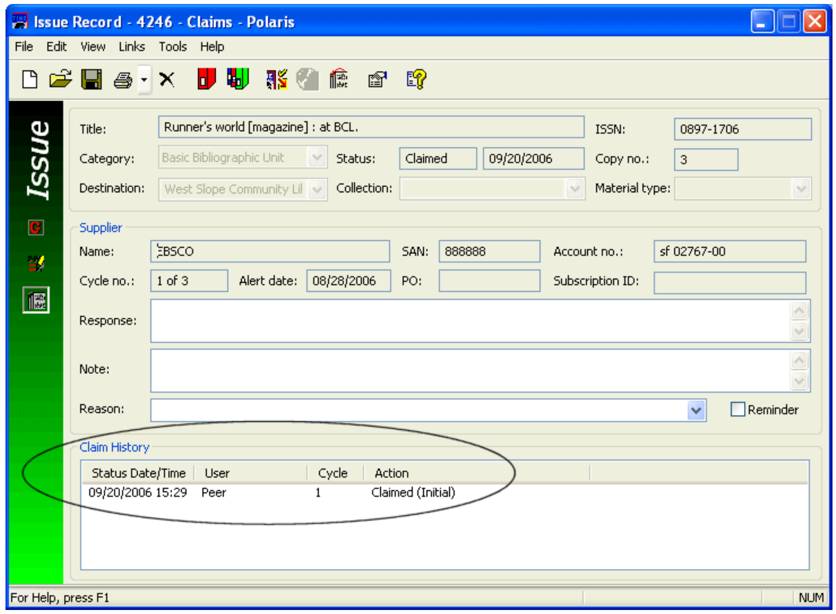
You set up claiming criteria in the Supplier record. The claiming criteria for Serials are the same as for monographic titles except that there is no information regarding cancellations. The claiming information in the Supplier record gets carried over into the Serial Holdings record, where you can specify additional claiming intervals.



If you are using manual claiming, the serial issues that are eligible to be claimed appear on the Claim Alert List, and they have the status of Pending Claim. You can claim the issues from the Claim Alert List. You can see the claimed issues when you change the filter on the Claim Alert List to Claimed. If you have selected automatic claiming, issues never appear on the Claim Alert List under Pending Claims. You must change the filter to display Claimed or All issues to see the automatically claimed issues.



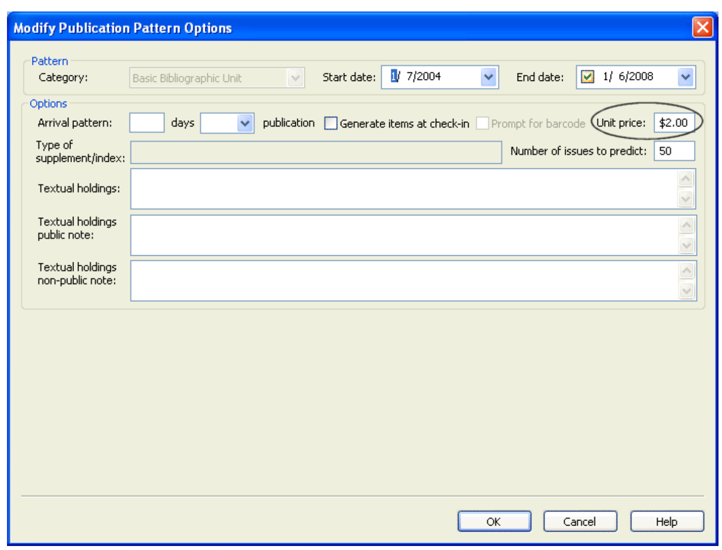
If an issue has been claimed, the claiming history appears on the Issue Record workform.



Publication Patterns

Unit Price Included in the Publication Pattern

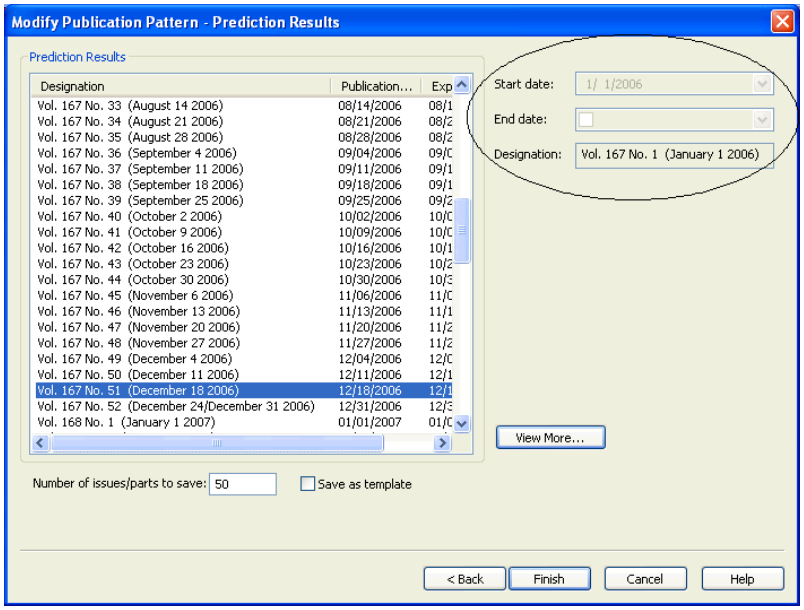
You can enter a unit price in the Pattern Options workform that automatically transfers to the issues and items created at check-in. When you check in the issues created with this publication pattern, the issues will have this unit price.



If you select **Generate items at check-in** and automatically create item records, the unit price will also be copied to the serial items. If you are using a serial item template that has a price, the price from the publication pattern will be used instead. If you select **Generate items at check-in** and **Prompt for barcode**, the barcode prompt dialog box appears with the unit price from the publication pattern, if the Polaris Administration parameter **Enter unit price at serials check-in** is set to **Yes**. You can enter a different amount for the item record, if applicable. See “Serials Check In Unit Price Prompt” on page 61.

Prediction Results Display the Start and End Date

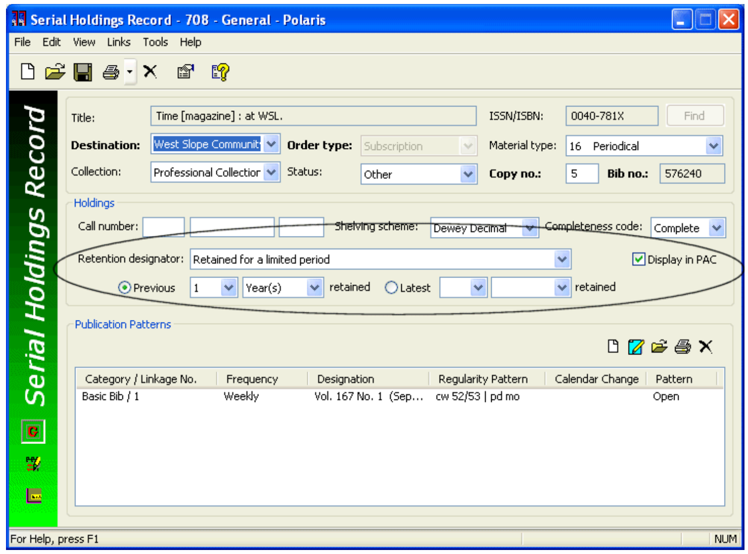
You can see the start and end dates and starting designation on the Prediction Pattern Results window, instead of having to page backwards.



Serials Holdings Display in the PAC

The information in the Serial Holdings Record controls the PAC display for the serials title. The Retention information in the Serial Holdings Record controls what issues are displayed under this title in the PAC. The default Retention designator is blank (permanently retained), but you can set this option to **Retained for a limited period** to limit the number of issues that display in the PAC.

Uncheck the **Display in PAC** check box to prevent *all* issues linked to this serial holdings record from displaying in the PAC, if they do not have linked item records. Use this option to prevent issues that do not circulate from displaying in the PAC.



The retention statement (e.g., **Latest 9 issues retained**) displays at the Location level in the PAC. Following the retention statement, the next line displays the note from the **Public Note** field in the Serial Holdings Record, if there is one. Then, on the next line is the compressed holdings statement containing the first and last issues retained.

You now have the option to display serials titles differently from your non-serials titles in the Polaris PowerPAC. You can expand the view of your non-serials titles, while keeping your serials holdings "collapsed" or rolled up under one compressed holdings statement. Patrons can click to expand the serials titles to see the individual issues, but they do not need to scroll through all the holdings when they first see the title. See "Compressed Serials Holdings Display in Search Results" on page 134.

Add Serial Holdings Records to Subscription Records

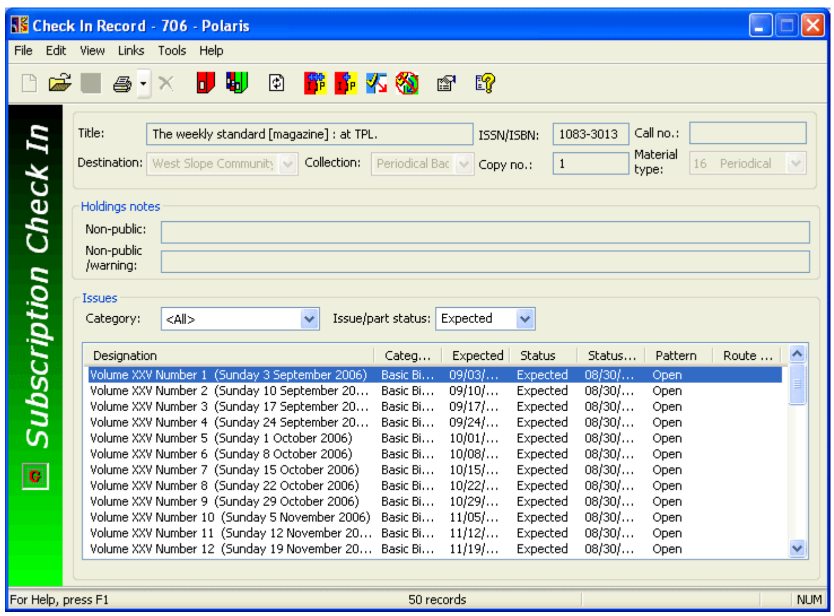
When you add a serial holdings record to a subscription record, you do not need to search for the serial holdings record using the Find Tool. You click the **Add** button, and the search is initiated automatically. It looks for a serial holdings record linked to the same bibliographic record as the subscription record. If there is one matching serial holdings record, the information is automatically brought into the subscription record. If there are multiple serial holdings records linked to the same bibliographic record, a dialog box appears and you can choose which serial holdings record to link to the subscription record.

Serial Issues Display

Several changes were made throughout Polaris to display issues more effectively.

Check In Workform

- ❑ You can use the Polaris Administration Acquisitions/Serials parameter **Default display of issues on Check In** to set the default on the Check In workform to display either **Expected** or **All** issues. If you set the display to **Expected**, you can more easily identify issues that have not been checked in.
- ❑ When you first open the Check In workform, the **Designation** column is sized according to the issue's enumeration and/or chronology. This makes it easier to see and check in the correct issue when it has a long designation.



Placing Holds on Issues in the PAC

When a patron places a hold on a specific issue in the PAC, it is by its designation. For example, the patron places a hold on v. 137, no. 18 (Nov. 22, 2004) in the PAC, and the item record that is linked to this issue will fill the request.

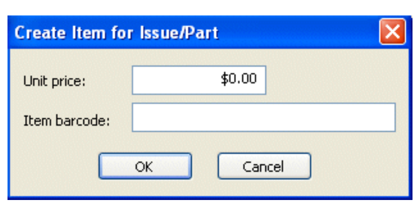
Designation Display for Serial in Staff Client and PAC

Whenever serials are displayed in the Polaris staff client or the PAC, the issue's designation is included. The display of the serial issue’s designation appears in the following areas:

- Item Find Tool results
- Check Out & Check In Workforms
- Request Manager
- Patron Status Workform - Items Out, Account Claims Holds, Reading History
- Item Record Set Workform
- Outreach Services Workform
- Course Reserves Workform
- Items Pending List
- Patron checkout list
- Patron holds list
- Patron account portion of Polaris PowerPAC
- Item-level request page of Polaris PowerPAC
- The Designation field in the Item record was renamed to Issue.
- Hold Request workform
- Hold Request Find Tool results
- Notices - Items Out Reminder Notice, Overdue Notices, Bill Notice, Holds Notice, Claim Notice
- Receipts & Slips - Check-out Receipt, Holds Slip, In-transit Slip
- Blocks & Hold message dialogs

Serials Check In Unit Price Prompt

A new Serials parameter **Enter unit price at serials check-in** specifies whether a prompt for the unit price appears along with the prompt for barcode when a serial issue or part is checked in. This parameter applies only when the publication pattern for the linked serial holdings record has **Generate item records at check-in** and the **Prompt for barcode** settings enabled. See “Unit Price Included in the Publication Pattern” on page 57.



Patron Services/Circulation

Polaris 3.3 includes major new features in patron services and circulation.

Searching for Patron Records

In the Polaris Find Tool, you can search for patron records by four new access points:

- **Free text block** (BLOCKFT)
- **Library-assigned block** (BLOCKLIB)
- **Last activity date** (LAD)
- **Notes** (NOTE)

These are available as **Search by** and **Limit by** options. For more information about Find Tool changes, see "Find Tool Enhancements" on page 14.

New Patron Record from the Find Tool

You can create a new patron record from the Polaris Find Tool. From the Polaris Shortcut Bar, select **Patron Services, Patron Records** or **Circulation, Patron Status**. In the results list of patron records, right-click and select **Create Patron** from the context menu. The New Patron Registration workform opens.

Searching for Patron Record Sets

You can search for patron record sets by creation date in the Polaris Find Tool, and the results list includes a **Creation Date** column. You can multi-select patron record sets in Find Tool search results, right-click, and apply functions such as **Delete** to all the selected record sets. You can also create a patron record set directly from Find Tool search results. See "Find Tool Enhancements" on page 14.

Improvements to Postal Code Processing

- ❑ **Postal Code dialog box** - The Postal Code dialog box that appears when you work with addresses has been improved. For example, when you use the tab key to go to a field, and you can enter data in the field, the field is highlighted.
- ❑ **Deleting table entries** - The nightly **Patron Processing** SQL job now removes "orphan" address entries, so that you can delete entries in the postal codes table that are truly not used in any record.

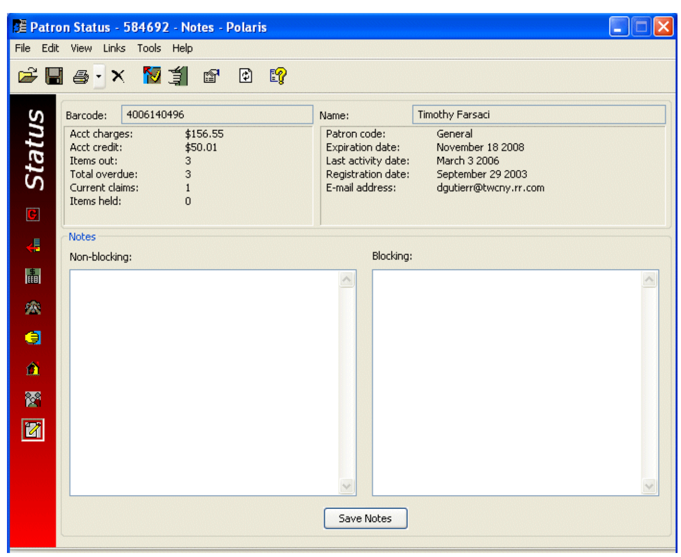
- **Offline upload** - The offline upload process no longer adds Zip codes to the postal codes table. If a patron address in an offline file has an unknown Zip code, or if the city does not match an existing Zip code, an error appears in the offline upload report and the address is not accepted. If the Zip code and city match an existing combination, but the county does not match, the county in the patron address is changed to match the existing Zip code-city-county combination.

Default Patron Passwords

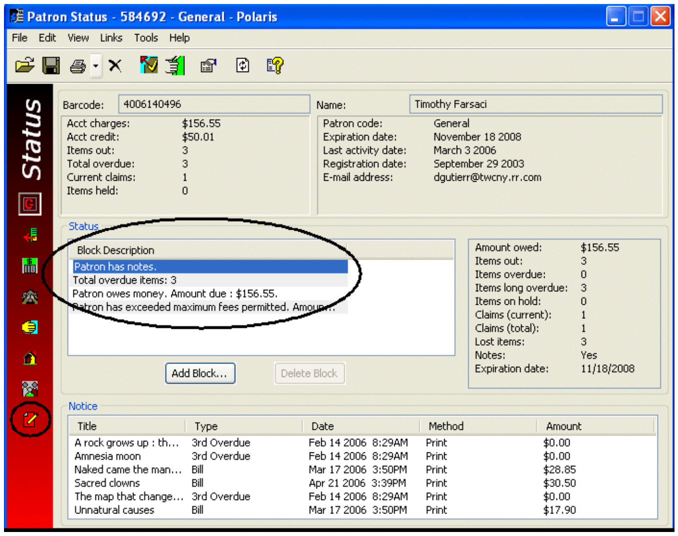
A new step has been added to the nightly **Patron Processing** SQL job. The step assigns the last four digits of the patron's primary telephone number (**Voice Phone 1**) to the password field of the patron record if a password does not exist. The default password step is disabled by default; if you are interested in activating this feature, contact your Polaris Site Manager.

Blocking Notes in Patron Records

You can add a note to a patron record that blocks the patron at check-out or renewal (online staff client), and blocks the patron from being added to a serials route list. Use the Patron Status workform - Notes view to add the blocking note. (It is still possible to add non-blocking notes as well.) You can also add or modify blocking notes in patron records in a record set through patron bulk change. A new Circulation permission, **Patron Status - Modify notes** is required to add a note to a patron record. Without this permission, the Patron Status workform - Notes view opens as a read-only view.



If the patron record has a blocking note, **Patron has notes** is displayed in the **Block Description** list on the Patron Status workform - General view, and the Notes view icon changes to red.



At normal check-out, if the patron record has a blocking note, a block message (**Patron has notes**) is displayed. You can select the message to open the Notes view of the Patron Status workform.

When you upgrade to Polaris 3.3, any existing notes in patron records become non-blocking notes.

Note:
Blocking notes do not affect offline circulation, Polaris ExpressCheck circulation, SIP/NCIP circulation, or renewal from PAC. They do not prevent a patron record from being deleted unless the Administration option **Block if patron has notes** (Patron Services parameter - **Patron delete options**) is checked.

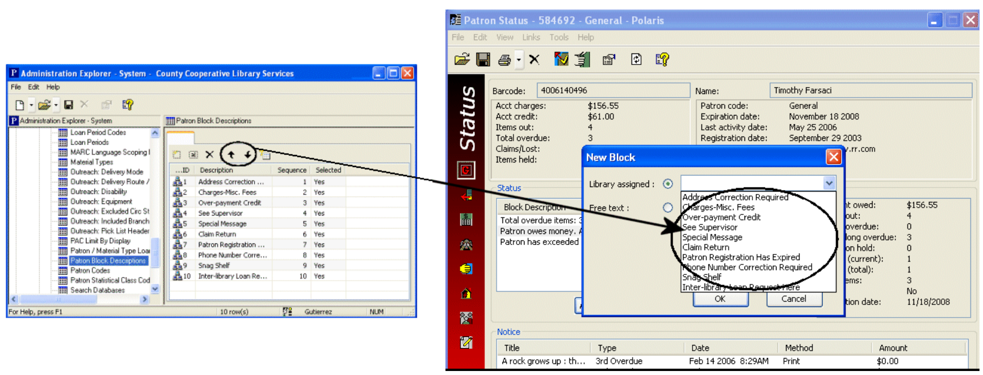
Overriding a Patron Block for Held Items

In previous versions of Polaris, if a patron was blocked at check-out for held items and the staff member did not have the permission to override circulation blocks, the staff member could not continue the check-out. In Polaris 3.3, if the only block in the Patron Blocks dialog box is for held items, the permission is not checked and the staff member can continue the check-out.

Library-Assigned Patron Blocks Improved

The policy table Patron Blocks has been improved and renamed Patron Block Descriptions. The table is now available at the system, library, and branch levels, with the same set of blocks available at each level. Blocks can be added, modified, or deleted at any level, although you can delete a block from the table only if it is not currently assigned to a patron record. Any changes made to this table immediately update the Polaris database.

By default, blocks added at the system level are selected for use for all the branches in the system; blocks added at the library level are selected for use by the library's associated branches. Blocks added at the branch level are selected for use for that branch only. At the branch level, you can select or de-select any block in the table for use in the patron records for patrons registered at that branch. Then, also at the branch level, you can re-order the selected blocks in the list. The order of blocks in the table determines the order in which the blocks are listed when a block is added to a patron record, when blocks are displayed at check-out, and when multiple blocks are listed in the Delinquent Patrons report.



Note:
When you are bulk-changing library-assigned blocks in a patron record set, you must first select a registered branch because library-assigned block choices depend on the patron's registered branch. When you are searching for patron records by library-assigned blocks with the Polaris Find Tool, the blocks are determined by the settings for your current log-on branch.

Re-Ordering Item Blocks

You can now re-order entries in the database table Item Block Descriptions. The order of entries in the table determines their display order when a block is added to an item record and when blocks are displayed at check-out. As in previous versions of Polaris, this table is available at the system, library, and branch levels. The system uses the settings for the item's assigned branch.

Patron Mailing Labels

You can right-click a patron line item in Polaris Find Tool search results or in a patron record set, and select **Add to Mailing Labels** from the context menu. This places the patron's address in an address set in the Mailing Label Manager. On the Mailing Label Manager workform, you can multi-select patrons from the Find Tool results list. For more information about the Mailing Label Manager, see "Creating Patron Mailing Labels" (Patron Services topics) in staff client online Help.

Patron's Birth Date

You can enter a birth year in the patron record that is earlier than 1900. For example, if you do not ask patrons their birth year at registration, you can enter 1776. You can save dates as early as 1753.

Patron's Last Activity Date

In previous versions of Polaris, the last activity date in a patron's record was updated with item check-out, renewal, quick-circ item check-out, and when a claim was made on an item. In Polaris 3.3, the last activity date is *also* updated for the following events:

- **PAC** - Log-in to patron account; placing and modifying hold and ILL requests; online renewal; patron information updates; payments; access to remote databases that require log-in
- **Polaris ExpressCheck, SIP self-check units** - Check-out and renewal; patron account access; payments
- **Time and print management applications** - Log-in
- **Inbound telephony** - Access account information and renew items

As in previous versions of Polaris, the patron's last activity date affects the following functions:

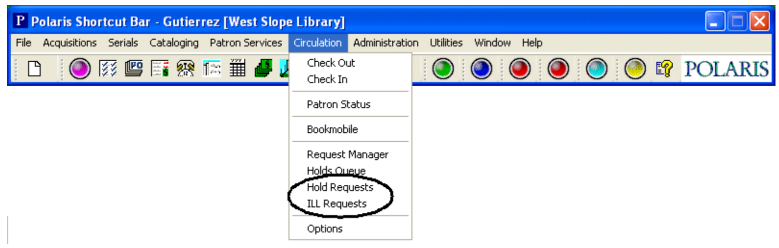
- Patron record automatic deletion (blocked according to last activity date)
- Patron record manual deletion (blocked according to last activity date)
- Inactive patron notice (triggered by last activity date)
- Reports, including Inactive Patrons, Collection Agency Summary, Verify Patron Data

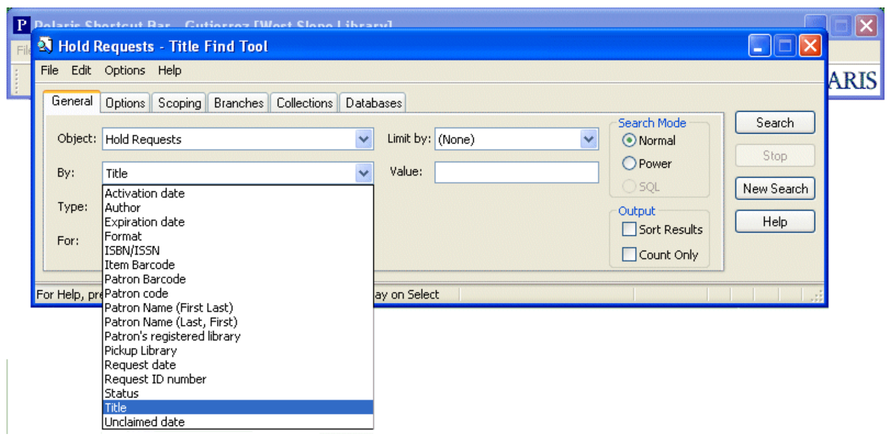
Hold and Interlibrary Loan Requests

Polaris 3.3 offers several improvements in hold request workflows and request processing.

Searching for Hold and ILL Requests

The Circulation menu on the Polaris Shortcut Bar offers two new search options, **Hold Requests** and **ILL Requests**. When you select these options, you can use the Polaris Find Tool to search for requests.





The table shows the Search by and Limit by access points for these searches.

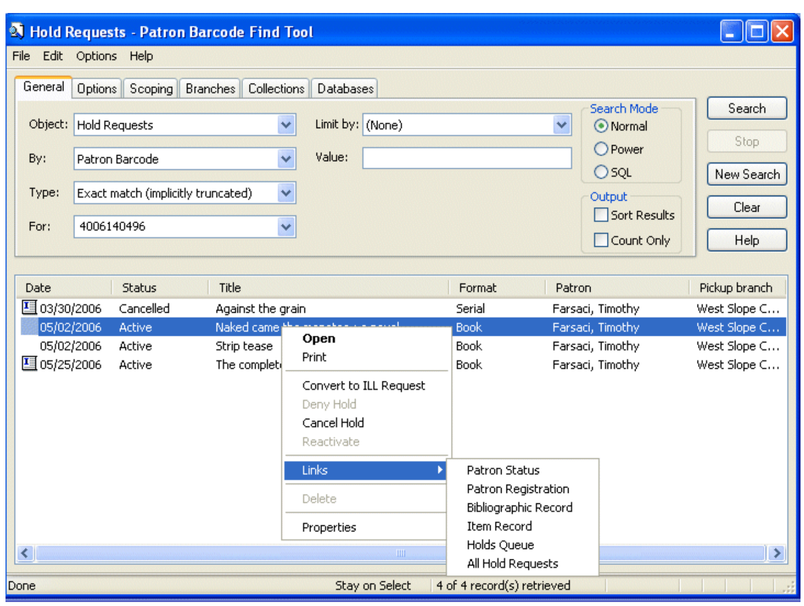
Object	*Search by*	*Limit by*
Hold Requests	• Activation Date (ACTD) • Author (AU) • Expiration Date (EXD) • Format (FMT - String or ID) • ISBN/ISSN (BNSN) • Item Barcode (BC) • Patron Barcode (PATB) • Patron Code (PATC) • Patron Name (Last, First) (PATNL) • Patron Name (First Last) (PATNF) • Patron's registered library (PATL) • Pickup Library (LIBN - String or ID) • Request Date (CRD) • Request ID number (CN) • Status (STAT - String or ID) • Title (TI) • Unclaimed Date (UNCD)	• Pickup Library (LIBN) • Patron Name (Last, First) (PATNL) • Patron Name (First Last) (PATNF) • Format (FMT) • Status (STAT) • Patron code (PATC) • Patron's registered library (PATL)

Object	*Search by*	*Limit by*
ILL Requests	• Author (AU) • Format (FMT - String or ID) • ISBN/ISSN (BNSN) • Need by Date (NBD) • Patron Barcode (PATB) • Patron Name (Last, First) (PATNL) • Patron Name (First Last) (PATNF) • Pickup Library (LIBN - String or ID) • Request Date (CRD) • Request ID number (CN) • Status (STAT - String or ID) • Title (TI)	• Format (FMT) • Patron Name (Last, First) (PATNL) • Patron Name (First Last) (PATNF) • Pickup Library (LIBN) • Status (STAT)

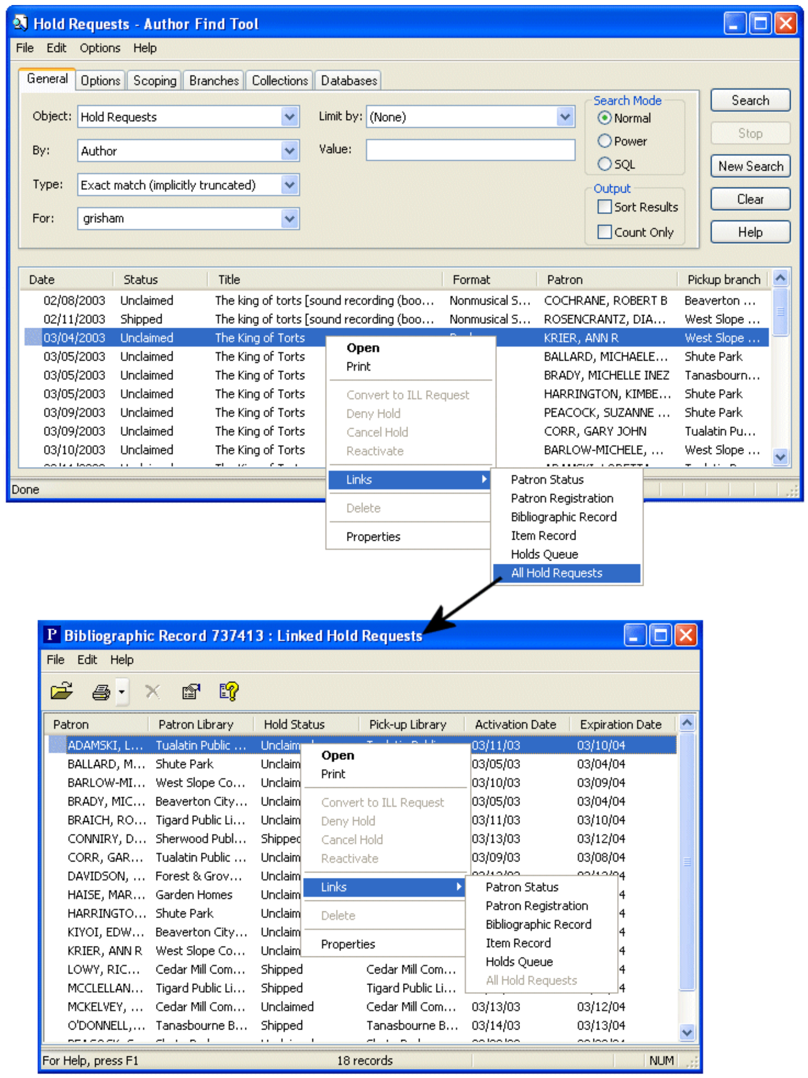
The results list for requests is sorted by title (primary) and status (secondary) when the **Sort Results** option is checked on the Find Tool.

Note:
If you search for hold requests in **Normal** mode by **Activation date**, **Expiration date**, or **Unclaimed date**, the appropriate date appears in the Date column of the search results list. All other hold request searches display the request date in the Date column. If you search for ILL requests in **Normal** mode by **Need-by date**, this date appears in the Date column of the search results list. All other ILL request searches display the request date in the Date column.

You can right-click an item in the results list to work with the request without opening it. The context menu displays the available options. For example, among other options for hold requests, you can link to associated patron, bibliographic, or item records, to the holds queue for the associated title or item, and to all hold requests for the title or item (regardless of their status).



When you link to all hold requests, the Linked Hold Request dialog box appears. You can print the list, double-click any line item to open the hold request, or select one or more line items and right-click to choose options from the context menu.



In the results list for hold requests, item-level requests are indicated by the new icon , as in other holds requests lists. See "Item-Level Hold Indicators" on page 77.

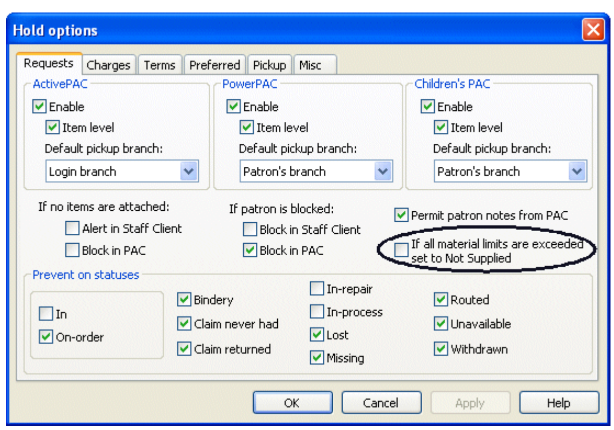
For more information about Find Tool developments in Polaris 3.3, see "Find Tool Enhancements" on page 14.

Total Hold Request Limits and Request by Material Types Limits

As in previous versions of Polaris, you set up total hold request limits and limits on specific material types with the Patron/Material Type Loan Limit Blocks policy table. These request blocks occur in the PAC when a patron has too many requests (status of Active, Inactive, or Pending) or too many requests for a specific material type at the same time. They occur in the staff client when you have selected the holds option **Block in staff client** (see "Define hold request processing options," Patron Services Administration topics, online Help). If you have selected this option, a block message is displayed in the staff client, and staff members have the option of overriding the block.

For *total hold request limits*, when a staff member overrides the block the request is placed with a status of Active. If the **Block in staff client** option is not selected, no block message is displayed and the request is placed as Active (or whatever status is appropriate), regardless of any request limits you set. Patrons are automatically blocked in the PAC when they try to place a request that is one over the specified limit.

In the case of *material type limits*, for item-level requests, the limit for the item's material type is checked directly. In Polaris 3.2, for bibliographic-level requests, if items of more than one material type were attached to the bibliographic record, the limits were not checked. For bibliographic-level requests in Polaris 3.3, a new Polaris Administration setting controls what happens when a patron reaches the hold limit by material type for a bib-level request. The Hold Options dialog box (Request parameters, **Hold options**) displays the new option, **If all material limits are exceeded set to Not Supplied.**



If this option is checked, and all the items attached to the bibliographic record have the same material type, a block message is displayed in the staff client, and staff members have the option of overriding the block. If the block is overridden, the request is placed with a status of Not Supplied.

The Not Supplied reason is **All items denied by system**. If some items have the limited material type and some do not, a message is displayed and those of the limited material type are automatically denied by the system.

If the new option is not selected (checked), and all the items attached to the bibliographic record have the same material type, a block message is displayed in the staff client, and staff members have the option of overriding the block. If the block is overridden, the request is placed with a status of Active. If some items have the limited material type and some do not, a message is displayed and those of the limited material type are automatically denied by the system.

For bibliographic-level requests where no items are attached to the bibliographic record, the limit is not checked. (Separate settings control how these requests are handled. See "Bib-Level Hold Requests with No Items Attached" on page 73.) In the PAC, the patron is blocked for a bib-level request if the request is one over the patron's limit and any or all of the attached items are of the limited type.

> **Note:**
> A patron's inactive requests are included when calculating whether the patron will exceed the total request limit or request by material type limit. This prevents patrons who are near the limit from suspending a number of requests in order to place more. The limit is also checked when a cancelled hold is reactivated.

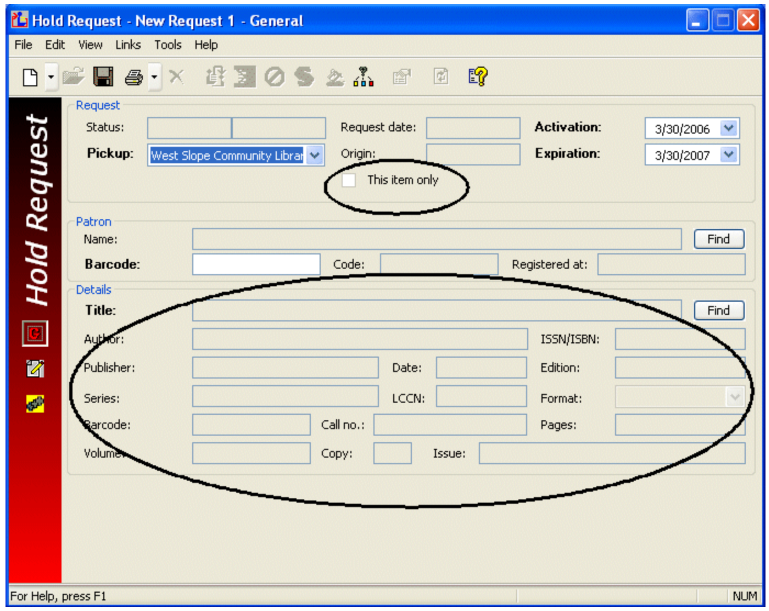
The Hold request workform - Notes view displays a blue icon for the item if the system denied the request on that item, or a red icon if a staff member denied the request.

In addition, the **Fill now** option is now available for the requests with a status of Not Supplied. Previously the option was not available.

For more information about setting up request limits, see "Defining Loan and Request Limit Blocks" (Patron Services Administration topics) in staff client online Help.

Hold Request Workform Changes

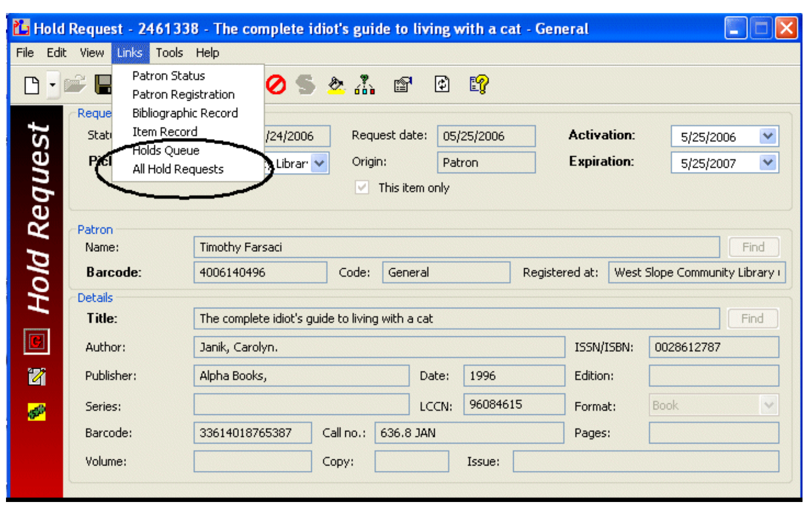
The Hold Request workform - General View has been simplified. The Details frame displays appropriate information from the bibliographic or item record. For item-level requests, the label for the read-only check box in the header of the workform has been changed to **This item only**.



For serial issues with linked item records, you can now make item-level requests as you would for a monographic item, and the new **Copy** and **Issue** fields are automatically filled in.

> **Note:**
> For serial issues without linked item records, you must still select **Tools, Unlock Request** to make the **Copy** and **Issue** fields available for data entry. The information you enter here is informational only and is not used to match an item to the hold request. However, if you convert the hold request to an ILL request, information in these fields is placed in the appropriate fields of the ILL request.

From the **Links** menu, you can now link to *all* hold requests for the same title or item, regardless of their status. When you select **All Hold Requests**, the Linked Hold Request dialog box opens. You can print the list, double-click any line item to open the hold request, or select one or more line items and right-click to choose options from the context menu.



Serial Data Displays in Request Manager Workform

If a hold request is linked to a serial item record, the title information includes serial data.

Columns in Request Manager Workform Reformatted

Columns in the Request Manager workform have been reformatted to fit the workform without displaying the horizontal scroll bar by default.

Reactivating Hold Requests in the Staff Client

The workflow for reactivating requests has been improved. When you reactivate a request in the staff client, and the request is not linked to a bibliographic record, the system searches for a bibliographic record to which the request can be linked. (The original request may not have been linked to a bibliographic record because the request was unlocked when it was created, and the bibliographic information was manually entered.) If no linked bibliographic record is found, you receive a message and the request is not reactivated. This indicates that you should create a bibliographic record or try to determine why none exists.

Changing the Activation Date for Pending Holds

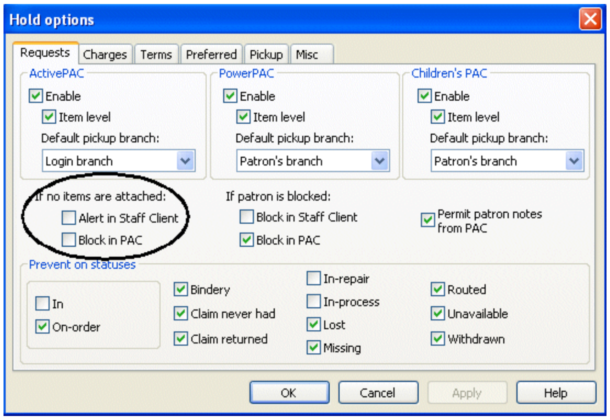
In the staff client, the **Activation** date field is now available for hold requests with a Pending status. This allows you to re-set the activation date when the request status is Pending. Setting the activation date to a date in the future will change the request status to Inactive.

Hold Request Blocks on Items with In Status

When you specify that items with the status of In should not fill hold requests, the staff client user receives a warning message if any item is In *at the pickup branch*. (Items that are In at other branches do not block the request.) The staff user can override the warning and continue to place the hold request, but requests from PAC are blocked. In previous releases, if an item was In at *any* branch, the request produced a warning and was blocked in PAC. For more information about setting hold request parameters, see "Defining Hold Processing Options" (Polaris Patron Services Administration topics) in staff client online Help.

Bib-Level Hold Requests with No Items Attached

In Polaris 3.3, separate settings for the staff client and PAC control what happens when a bib-level request is placed and no items are attached to the bibliographic record. These settings replace the single setting **Permit if no items attached** (**Requests** parameters, Hold Options dialog box - Requests tabbed page) in previous versions of Polaris.



- **Alert in Staff Client** - When this option is checked, staff members receive an alert message if they place bib-level hold requests when no items are attached. From the alert message, the staff member can choose to place or cancel the hold request. If this option is not checked, no message appears and the hold request is automatically placed. The setting for the staff member's log-on branch controls whether the message is displayed. You may want to leave this option unchecked to prevent repeated messages to staff if your acquisitions staff regularly place bib-level hold requests when no items are attached—for example, from the Purchase Order or Purchase Line Item workforms.
- **Block in PAC** - When this option is checked, patrons are blocked from placing bib-level hold requests when no items are attached. A message advises patrons to contact the library for assistance. If this option is not checked, a message informs the patron that no items are linked to the request. The patron can choose to continue or cancel the request. The settings for the requesting patron's registered branch determine how the system treats bibliographic-level hold requests when no items are attached.

Checkout Blocks on Items with Unclaimed Requests

Previously, a user received a hold block at checkout when both the item status and the status of the request itself were held. If a request status changed to unclaimed, even though the item was still held, the checkout block would not appear. The block now appears for unclaimed requests as well.

Duplicate Hold Requests from PAC

Duplicate detection has improved for hold requests from the PAC. The ISBN is included when the system checks for duplicate hold requests.

PAC Hold Requests on Specific Items

When a patron clicks **Submit Request** to place an item-level hold in PAC, a message asks the patron to confirm that she wants the specific item. To confirm the item-level request, the patron clicks **This item only**. If the patron decides that any copy is acceptable, she clicks **First available copy**. The message does not appear for course reserve items.

In the availability view, the hold request icon is not displayed for a specific item if the item is not holdable.

Detailed Request Information in PAC Patron Account

Patrons can now view detailed information about their hold and ILL requests from the PAC patron account. The Requests page displays an information icon beside each request.

The patron can click the information icon to see detailed information about the request.

The patron can cancel, suspend, or reactivate the request when the detailed information is displayed; these features are also available on the Requests page, as in previous versions of Polaris.

Hold Requests on DartClix® "Titles"

DartClix records from Brodart are MARC records that describe Web sites. Hold requests from the staff client or from PAC cannot be placed on search results whose bibliographic records derive from DartClix.

PAC Hold Requests Prevented on Cataloged Web Sites

The **Place Request** button is not displayed for a title in Polaris PowerPAC if the bibliographic record has an 856 tag (URL), the total system count for the title is 0, and the Type of Material is E-resource.

Hold Transactions

All holds-related database transactions now log the following fields: patronID, itemID, bibID, requestID, patronBranchID, and pickupBranchID. These changes improve the power and accuracy of reports. (See, for example, "Statistical Summary Report" on page 20.)

Transaction type 6005, which used to record when a hold becomes active, has been renamed to **Hold request created**. This transaction now logs when a request is created from the staff client or the PAC. It no longer records the repeated changes to active status that may happen to the same hold request due to requests-to-fill processing, holds binding, or reactivating the hold. This change provides a more accurate count of how many holds have been placed for use in reports such as the Circulation Summary Statistics report. In related development, transaction type 6031, which used to record hold requests from PAC, has been deleted. In its place, transaction type 6005 has two subtypes: 1 indicates a hold request created from the staff client, and 2 indicates a hold request created from the PAC.

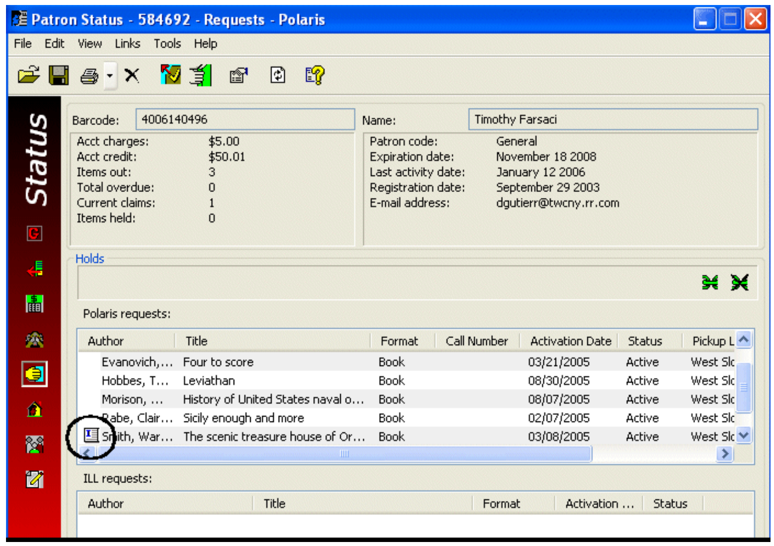
Cancelled hold request transactions now have separate subtypes the identify whether a request was cancelled from the staff client, PAC, or Polaris ExpressCheck.

Holds for Multiple Patrons

When you are placing a hold request for multiple patrons, and the first patron in the list does not qualify for the request, that request is not saved but the process continues for the other patrons. During this process, the messages now include the patron name, so you know to which patron the message applies.

Item-Level Hold Indicators

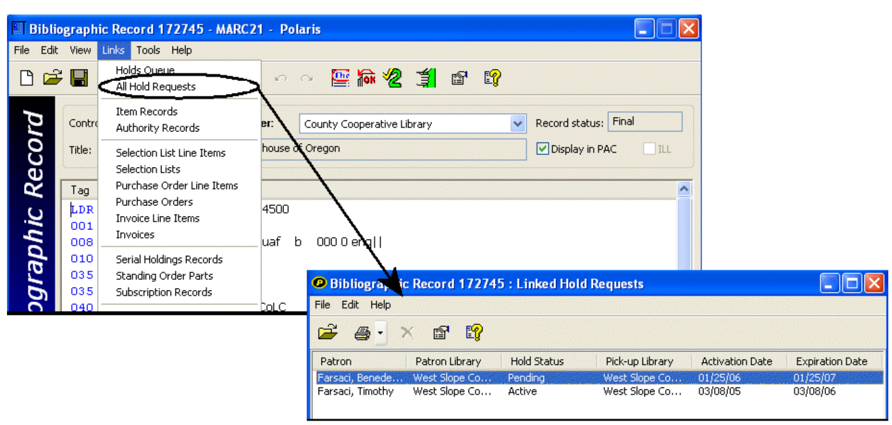
A new icon indicates an item-level hold in lists of hold requests such as the Request Manager, the Holds Queue, the Patron Status workform, and the Find Tool results list for hold requests. The illustration shows the Patron Status workform with an item-level request indicated by the new icon.



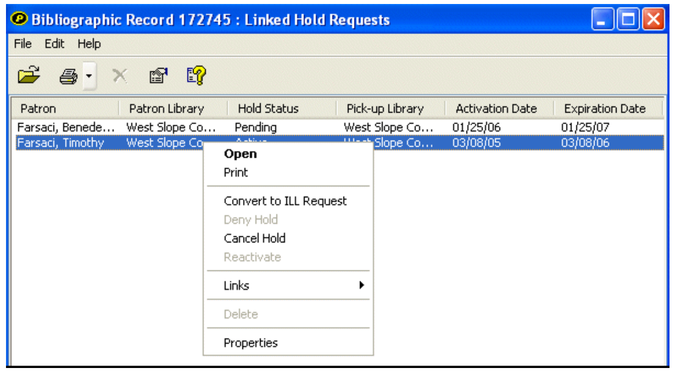
On the printed RTF report, an item-level hold request is indicated by the message **This item only**, printed at the end of the first line of the request.

List of Holds from Bib and Item Records

You can view a list of holds, regardless of their status, from a bibliographic or item record. To open the list, select **Links, All Hold Requests**. The Linked Hold Requests dialog box opens.



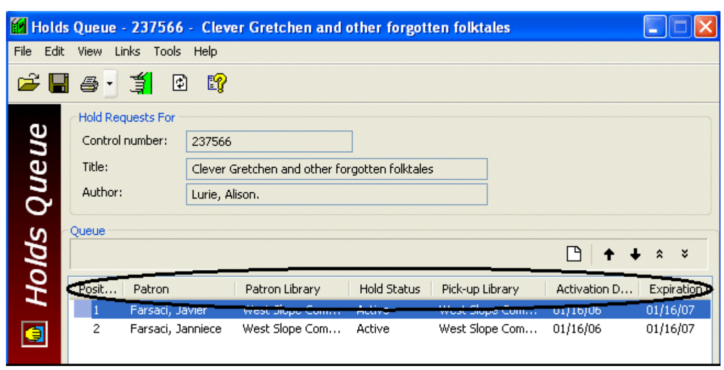
On the Linked Hold Requests dialog box, any item-level holds are indicated by the item-level hold icon . You can print the list, double-click any line item to open the hold request, or select one or more line items and right-click to choose options from the context menu.



Holds Queue Workform Improvements

You can select multiple requests in the list for cancellation. Use **CTRL** or **SHIFT** to select the requests, right-click in the list, and select **Cancel Hold** from the context menu.

The **Library** column head has been renamed to **Patron Library**, and the columns have been rearranged. The columns are consistent with the Request Manager workform and the Linked Hold Requests dialog box.



You can view a list of holds on the title or item, regardless of their status, from the holds queue. To open the list, select **Links, All Hold Requests**. The Linked Hold Requests dialog box opens. You can print the list, double-click any line item to open the hold request, or select one or more line items and right-click to choose options from the context menu.

Holds Links on the Item Record Workform

On the Item Record workform - Circulation view, if the item is being held for a patron, you can double-click the patron barcode in the **Held for patron** field. This opens the patron's record in the Patron Status workform - Requests view. (You can also select **Links, Held For.)** The new **Held at** field shows the pickup branch when the request status is Held, Unclaimed, or Shipped.

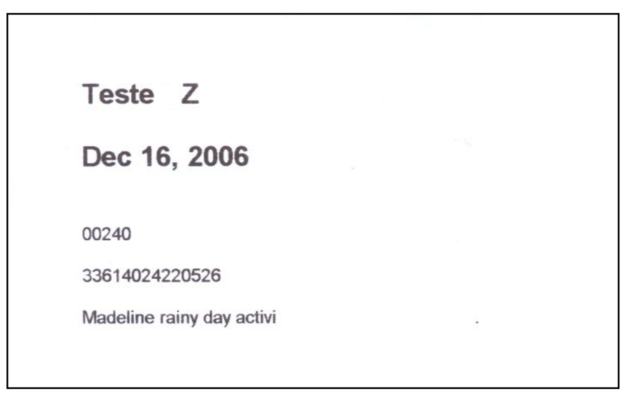
Hold Slip and Hold Call Slip Improved

You can choose to print the notification method, the patron's e-mail address, or both, in addition to other optional information on the hold slip. In Polaris Administration, set these options with the Patron Services parameter **Hold slip options**. The patron's middle name is now included in the patron name information on these slips.

Hold Pickup Slip Available

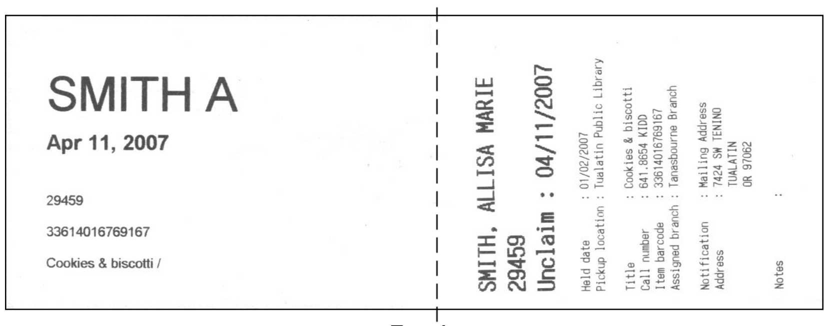
A new hold pickup slip is designed for libraries that allow patrons to pick up their own held items. The hold pick-up slip is inserted in the book so that the first few letters of the patron's last name and the pick-up date are visible on the shelf. This slip is printed horizontally on the receipt paper, and requires a line mode receipt printer such as a Star® TSP600, Star TSP700, or Dell™ T200.

Hold pickup slips always include the first five letters of the patron's last name, the patron's first and middle initials, and the pick-up (unclaimed) date, all printed in bold, large characters, as well as the title in normal weight, smaller characters. You can add the last five digits of the patron's barcode and the full item barcode, printed in normal weight, smaller characters. The illustration shows an example.



Use the new Patron Services parameter **Hold pickup slip options** to set up and enable hold pickup slips. You can specify the optional information to include, and the number of blank lines to insert on the right side of the slip. This setting determines the length of the blank "tail" that is inserted into the book.

In addition, you can choose to append the pickup slip to the default hold slip, the hold call slip, or both. With this option, both slips are printed together so the information needed for processing is available on the standard hold slip or hold call slip, and the pick-up slip portion can be torn off and placed with the item. On supported line mode receipt printers, when auto-cut is enabled, the two portions are connected only by a small area in the center and are very easily separated. The illustration shows an example.



Tear here

Once enabled, you can set hold pickup slips to print from the Check In workform, Check Out workform, Item Record workform, Patron Status workform - Items Out view, or Hold Request workform when an item's status becomes Held. Select **Tools, Options**, and select the hold pickup slip option from the dialog box. If you set up appended pickup slips, the combined slips are printed when the **Print hold slip** or **Print hold call slip** option is selected from the **Tools, Options** menu in the circulation workform. (If you select **Print hold pickup slip**, the pick-up slip is printed alone.) From the Request Manager, you can select **Print ILL Pickup Slip** if hold pickup slips are enabled; the slip prints when an interlibrary loan item is received. As with other receipts and slips in Polaris, you need to select the option for the workform only once at each staff client workstation.

In-Transit Slip from Hold Request Workform

You can set in-transit slip printing from the Hold Request workform. This is useful when you use the **Fill Now** option from the workform, and the item becomes transferred to another pick-up branch. In the Hold Request workform, select **Tools, Options**, and select the in-transit slip option from the dialog box. As with other receipts and slips in Polaris, you need to select the option for the workform only once at each staff client workstation.

Check In Workform Improvements

The Check In workform and related workflows have been improved in the following ways:

Access Permissions

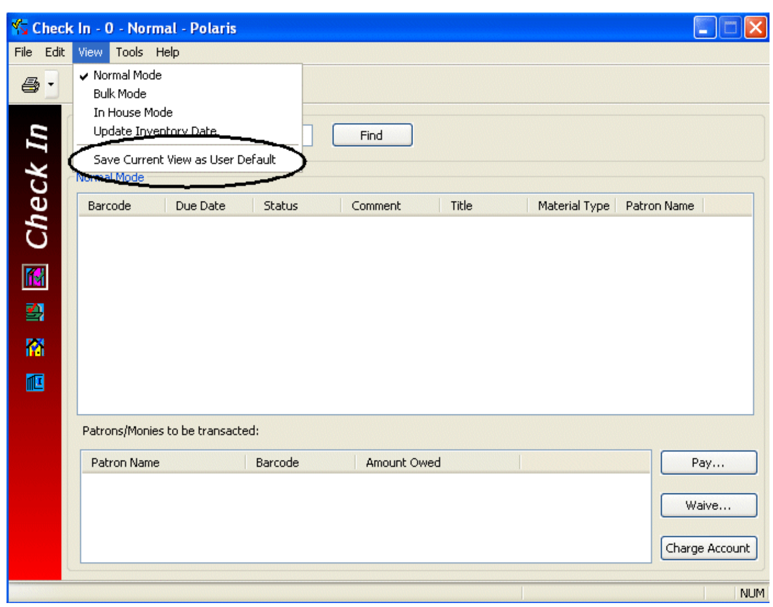
New system-level Circulation permissions control access to the various views of the Check In workform:

- **Circulation check-in workform - Access Bulk mode**
- **Circulation check-in workform - Access In-House mode**
- **Circulation check-in workform - Access Inventory mode**
- **Circulation check-in workform - Access Normal mode**

If the staff member does not have permission to access a view, the appropriate View menu option is grayed out and the view icon is not displayed on the left side of the workform. If the staff member does not have permissions to access *any* Check In workform views, and tries to open the Check In workform, a permission override message appears. The override grants access to the Check In workform - Normal view.

User-Specified Default View

A staff member can set any view of the Check In workform as the default view. The setting is saved in association with the staff member log-on, and remains in effect regardless of the log-on workstation or branch. To set the default, open the appropriate view and select **View, Save Current View as User Default**.



Check In Workform - Inventory View

The Check In Workform - Inventory view displays the title of a scanned item, in addition to the barcode, status, and comments. If an item is scanned that has a status other than In, the Comment column displays the problem. You can check in the item from the Check In workform - Normal or Bulk view, or right-click the item in the list to open the item record.

In addition to scanning barcodes, you can load a barcode file generated by another device. Select **Tools, Load barcode file**, or press **CTRL+ALT+I**. An explorer window opens, where you can browse to and select the file of barcodes.

Free Days

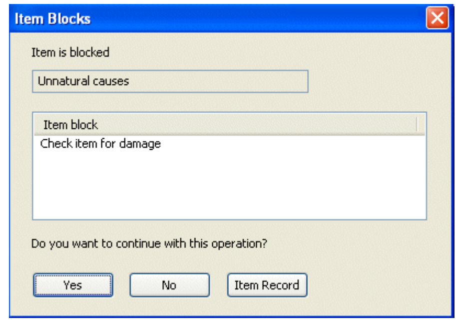
Free days are days omitted from the overdue fine calculation, and prevent unfair charges for overdues when the library is closed. In effect, the free days setting also allows you to “back-date” the check-in. In Polaris 3.3, you can set separate default numbers of free days for normal and bulk check-in. The new Patron Services parameter **Free days (normal)** controls the default setting on the Check In workform for normal check-in. The Patron Services parameter **Free days (bulk)** controls the default setting for bulk check-in and when uploading offline transaction files (Bookmobile workform). In previous versions of Polaris, when an item was billed or declared lost, the system used the **Free days (bulk)** setting. In Polaris 3.3, no free days are applied in these situations.

The parameters can be set on the system, library, or branch level. At check-in, the system always uses the settings for the receiving branch; the Patron Services parameter **Free days use receiving branch/assigned branch** has been removed in Polaris 3.3.

Staff members with the new permission **Modify free days: Allow** can modify the default settings for free days on the normal, bulk, and offline upload workforms.

Blocked Items at Check-In

The item blocks dialog box appears at check-in when there are library-assigned, free text, or system blocks on the item record. The dialog box now appears at the beginning of the check-in process, before any messages about fines or hold requests, as it does at check-out. You can now cancel check-in of an item when the item blocks dialog box appears, continue with the check-in, or open the item record.



Shelving Status Option for Checked-In Items

When an item is returned to its assigned branch and checked in, the item's circulation status becomes In even though the item may not be immediately returned to the shelf. This can be confusing for a patron who finds the item in PAC, notes that it is In, but cannot find it on the shelf because it is still on the book truck. For each material type, you can set a period of time during which the checked-in item's In status is displayed as Shelving (or another appropriate description). For the time period you set, the shelving status description is displayed for the item in the PAC, the staff client Find Tool search results, the PAC preview in the bibliographic record, and the linked list of item records available from the bibliographic record or any linked item record. You can limit Find Tool item searches by shelving status. For items checked in offline, when the offline transactions are uploaded, the shelving status display is calculated according to the date/time of the check-in recorded in the upload file.

When you enable the shelving status option, the shelving description is displayed only when an item is checked in during a circulation process and its circulation status changes to In. The option is not used when an item is created with a status of In or when the status of multiple items is changed to In through bulk change.

Note:
If you use Polaris Serials, part of your serials processing workflow may be to create items with a status of In when a serial issue is checked in. If you want to use the shelving status description with these items, set the status to In Process or another status other than In, then check in the item as a circulation process—using **Circulation, Check In** or selecting **Tools, Check In** from the item record workform.

In Polaris Administration, the Patron Services parameter **Shelving status options** enables the shelving status option, controls how long the shelving status description is displayed for each material type, and specifies what happens when an item is re-scanned. You can set the time periods at the system, library, or branch level, but the text used for the shelving status description can be set only at the system level to provide consistency in PAC search results. When an item is checked in, the shelving status settings for the transacting branch are used.

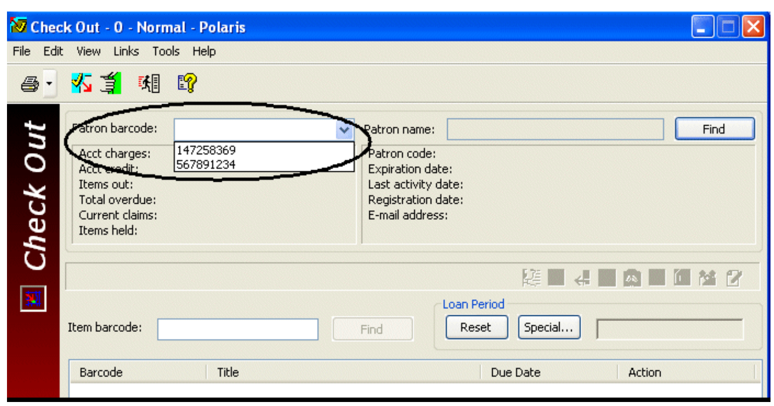
For details about setting this parameter, see "Setting Shelving Status" (Patron Services Administration topics) in staff client online Help.

Check Out Workform Improvements

The Check Out workform and related workflows have been improved in the following ways:

Recall Last Patron Checked Out

For both online and offline check-out, you can readily recall the last patron barcode by selecting the arrow by the **Patron barcode** box. The box displays up to two barcodes—the last patron scanned, and the patron before that one. Selecting the barcode from the box has the same effect as scanning or typing the barcode. However, any items checked out when the barcode was entered the first time do not appear again in the items list. The barcodes are cleared when you close the Check Out workform.



Deleting Patron Records

When you delete a patron record with the Check Out workform open as well as the Patron Registration or Patron Status workform, the Patron Registration or Patron Status workform closes but the Check Out workform stays open and ready for the next patron barcode.

Finding Bibliographic Records

If a patron wants more information about a title, you can search for bibliographic records without leaving the Check Out workform. Click in the toolbar or press **CTRL+B**. From the Find Tool results list, you can open the bibliographic record. This feature is also convenient for finding an item's missing barcode. Right-click the bibliographic record in the results list and select **Links, Item Records**.

Lost Items

If a lost item is checked out, **Item was lost** is displayed for the item in the list of items checked out.

Check-Out Receipts - Due Time

The due time is printed on check-out receipts for hourly and overnight loans.

Circulation Transactions and Circulation Statistics Reports

Checkout/Renew transactions now log the item's assigned branch at the time of the transaction. Thus, even if the item is deleted, the transaction is available for circulation statistics reporting. (The item's assigned branch also continues to be logged as part of a check-in transaction.) In general, circulation statistical reports now use transactional data before current item record data. The Circulation by Item's Assigned Branch and Circulation by Item's Loaning Branch reports first use the item's assigned branch at the time of the transaction, and only use the current branch in the item record itself if the value cannot be found. Similarly, the material type is taken first from the transaction, and only from the actual item record when this value is not available. The Item Circulation by Collection report also uses transactional data for material type and collection. In order to insure uniform reporting of annual circulation statistics, upgrades to Polaris 3.3 include an update that adds the item's assigned branch ID (ItemAssignedBranchID) to all check-out and renew transactions back to January 1 of the year Polaris 3.3 is installed.

Note:
The new Statistical Summary report (under **System** in the Report Manager) includes information formerly available in the Circulation Summary Statistics report, which has been removed. See "Statistical Summary Report" on page 20.

Patron Log-On Transactions

Patron log-ons from PAC (TR_PAC_LOGON, transaction type 2200) are now reported in the PAC Statistics section of the Statistical Summary report, a system report available from the Reports and Notices menu (see "Statistical Summary Report" on page 20). The transaction is logged whenever a patron logs on in the PAC, including log-ons to place hold requests. Additional information associated with the transaction includes the Patron's ID, patron code, statistical class, and registered branch.

Check-Out and Renewal Permissions

Two new system-level Circulation permissions control the ability to do certain renewals in the staff client:

- **Renew overdue items - Allow**
- **Override renewal blocks - Allow**

These permissions apply during check-out, when an item is already checked out to a patron and the systems prompts to renew the item, and when items are renewed from the Patron Status workform - Items Out view.

An additional system-level Circulation permission, **Override non-circulating blocks - Allow**, applies when the staff member wants to override a check-out block in the following cases:

- The non-circulating option is specified in the item record.
- The material type limit for that patron code is set to 0 in the Patron Material Type Loan Limits policy table.
- The loan period for the material type is set to 0 units in the Loan Periods policy table.

At installation, all three permissions are granted by default.

Replacement and Processing Fees by Material Type

Using the Patron Services parameter **Replacement fee options**, you can now set separate default replacement costs and processing fees for each material type. You can set the parameter at the system, library, or branch level. When an item is manually declared lost, or is automatically declared lost when it is billed, the **Replacement fee options** settings for the item's assigned branch are used. The settings for the governing branch for fine calculations are used to calculate the overdue fine, if any. As in previous versions of Polaris, when a patron must be charged to replace a lost, damaged, or long overdue item, Polaris can use the original price of the item or a default cost set by library policy. If the item's original price is unknown (the **Price** box on the Item Record workform is blank), the default replacement cost is used. However, you may choose to use the default replacement cost for every item, whether the original price is known or not. If you are upgrading from a older version of Polaris, the values for each material type are the same and are taken from the former system-level parameter. For new installations, the default replacement cost and processing fee are $20 and $5 respectively for each material type.

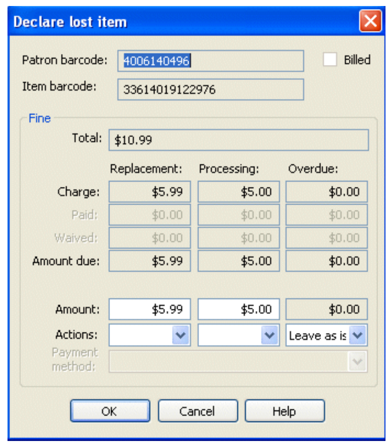
Related to this development, a new Circulation permission, **Modify lost item amount**, is necessary to change the replacement and processing fee amounts in the Declare Lost Item dialog box. The permission is granted by default.

Separate Processing Fee in Bills and Transactions

Processing fees for lost items are now listed separately in bill notices and in the Patron Status workform - Account view. This means that in the Account view, there may be three separate line items related to a lost item: the replacement cost, the processing fee, and an overdue fine.

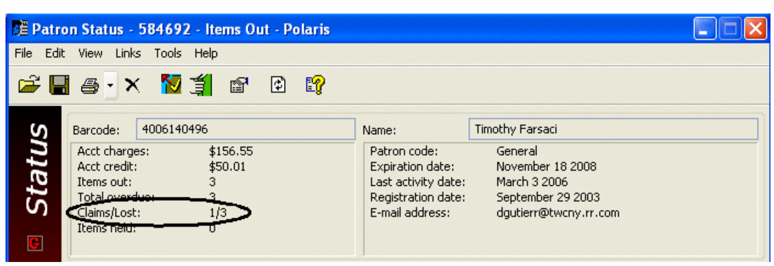
Separate Processing Fee in Lost Item Dialog Boxes

Processing fees are now listed separately in the Declare Lost Item and Resolve Lost Item dialog boxes, and can be managed separately from replacement and overdue charges. The illustration shows the Declare Lost Item dialog box.



Lost Item Count in Workform Headers

The **Current claims** line in the headers of the check-out workform and patron status workform has been changed to **Claims/Lost**, and records both a patron's current claims and currently lost items as two counts, separated by a slash. The illustration shows the Patron Status workform.



Lost Item Recovery Default Actions

When a lost item is recovered at check-out or check-in, the charges associated with the item must be resolved (charged, waived, credited, or left as is, as appropriate). In Polaris 3.3, you can set defaults so that the charges are resolved automatically when lost items are recovered at circulation, and staff members do not have to resolve each item manually.

Use the new Patron Services parameter **Lost item recovery** to set the default actions. The settings for the transacting (check-in or check-out) branch determine the default actions. The **Replacement fee options** settings for the item's assigned branch are used to calculate replacement cost and processing fee; the settings for the governing branch for fine calculations are used to calculate the overdue fine, if any. You can set separate default actions for normal check-in, bulk check-in, and check-out. Your settings determine how lost items are resolved in the online staff client and in the following situations:

- **Offline circulation** - Uses check-out and normal check-in settings.
- **Polaris ExpressCheck** - If you have set Polaris ExpressCheck to permit check-out of lost items, your settings for normal check-out are used. For information about Polaris ExpressCheck settings, see the *Polaris ExpressCheck Administration Guide*.
- **SIP/NCIP circulation** - Does not support default settings; returns error messages for lost items.

On the **Lost Item Recovery** tabbed page of the dialog box, you set the processing defaults that should apply when lost items are recovered at circulation, but the charges related to the items *have not been paid or waived*. You specify the maximum time period for which automatic changes to the patron account should apply. For any specific item, the period you specify is measured from the point when the item was declared lost. Then you specify each circulation situation (normal check-in, bulk check-in, and check-out) where you want to charge or waive lost item fees automatically. If a lost item is recovered in a specified situation before the time you set, fees are charged or waived automatically according to your settings. If the item is recovered after the specified time, the circulation transaction continues but no changes are made to the patron account. If you leave a circulation situation unchecked, automatic processing is not applied, and staff members must resolve the charges when a lost item is recovered in that situation. For each circulation situation that you specify, you select the automatic action to take for each fee (**Overdue fine**, **Processing fee**, and **Replacement cost**):

- **Charge** - Leaves the charge related to the lost item unchanged in the patron account.
- **Waive** - Waives the charge in the patron account.

The patron's Account Transaction Summary will be updated according to the action you specify.

Note:
You can also control whether overdue fines are charged in the first place when an item is declared lost or is billed-to-lost. See “Overdue Fines on Items Billed-to-Lost or Declared Lost” on page 89.

On the **Lost-and-paid recovery** tabbed page, you set separate processing defaults that should apply when lost items are recovered at circulation, and the charges related to the items *have already been paid.* Like the Lost Item Recovery tabbed page, you set a time limit and specify each circulation situation where you want the default actions to apply. For each circulation situation that you specify, you select the automatic action to take for each fee:

- **Credit** - Credits the patron’s account for the payment amount related to the lost item. If an amount was partially paid, the paid amount is credited and the unpaid balance is waived.
- **Leave as is** - Leaves the transactions related to the lost item unchanged in the patron account.

If you are upgrading from Polaris 3.2 to Polaris 3.3, you choose to set lost item recovery options, and an item was lost-and-paid before the upgrade, no automatic lost item recovery action can be taken. The system behaves as though the recovery period has passed, and the patron account is left as is. If you are upgrading from Polaris 3.2 to Polaris 3.3 and choose not to set lost item recovery options, you will see no change in system behavior regarding lost items.

Overdue Fines on Items Billed-to-Lost or Declared Lost

Two new Patron Services parameters determine whether an overdue fine is charged at the time an item is billed and automatically set to lost, or declared lost. For billed items, the new parameter **Lost item: Charge overdue if billed** works with the system-level parameter **Overdues: billed item set to lost** as follows:

Overdues: billed item set to lost	Lost item: Charge overdue if billed	*Effect*
Yes	Yes (default)	The billed item’s status automatically changes to Lost. Overdue charge is placed on the patron account, along with other appropriate charges related to lost items.
Yes	No	The billed item’s status automatically changes to Lost. No overdue charge is written to the patron account, but the other appropriate charges related to lost items are placed on the patron account.
No	N/A	The billed item’s status remains Out. The overdue charge and other appropriate charges related to billed items are placed on the patron account.

The new parameter **Lost item: Charge overdue if declared lost** controls whether overdue fines are placed on the patron account when an item is declared lost. This parameter is set to **Yes** by default.

The new parameters are available at the system, library, and branch levels. The governing library setting for fines determines whose settings for these parameters are in effect. For more information about governing library settings, see "Setting the Governing Library for Circ Transactions" in staff client online Help (Patron Services Administration topics).

You can also choose to charge or waive overdue fines at lost item *recovery*. See "Lost Item Recovery Default Actions" on page 88. Libraries who use a collection agency may find the **Lost item: Charge overdue if billed** and **Lost item: Charge overdue if declared lost** parameters useful, since the overdue fines for items that were billed-to-lost or declared lost do not inflate the patron's total amount due in cases where the overdue fines would have been waived if the lost items were recovered.

Modifying Item Status Descriptions

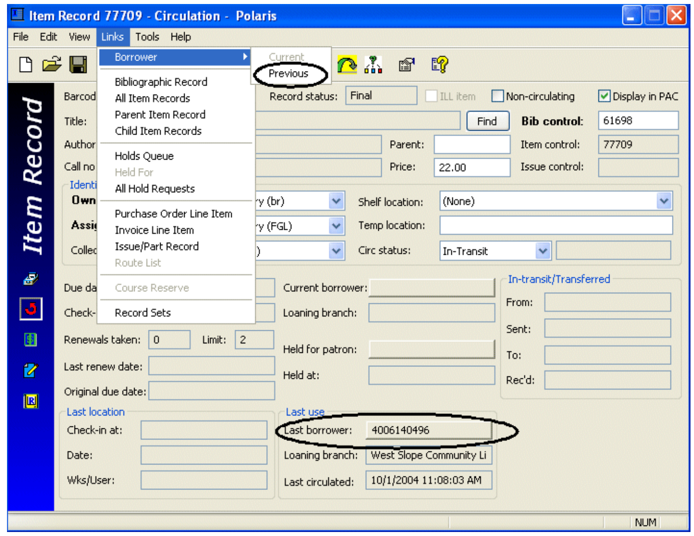
You can now modify the description of an item circulation status at any organizational level, in the Circulation Statuses database table. Changes are immediately applied to all Polaris records that use the circulation status, regardless of which organization owns the records. The modification affects only the description that is displayed; it remains associated with the underlying circulation status that appears in the **Name** box. To modify a circulation status description, select the circulation status entry in the table and click .

Related to this development, you can modify the description for the non-circulating item status (those items where **Non-circulating** is checked in the item record). When you modify the description for this status, your description is displayed in the PAC for these items, but the description itself is not available as a Find Tool search filter or an option for bulk change. The actual status is **Non-circulating**.

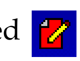
The Circulation Statuses database table also displays the new "virtual" Shelving status. For information about this feature, see "Shelving Status Option for Checked-In Items" on page 83.

Borrower Links from the Item Record Workform

On the Item Record workform - Circulation view, you can open the current or last borrower's record in the Patron Status workform - Items Out view. Select **Links, Borrower**, or double-click the patron barcode in the **Current borrower** or **Last borrower** field. You can display or suppress the last borrower link and barcode with the Patron Services parameter **Last use patron display**, available at the system, library, or branch level. For more information about item record workform changes, see "Redesign of the Item Record Workform" on page 42.

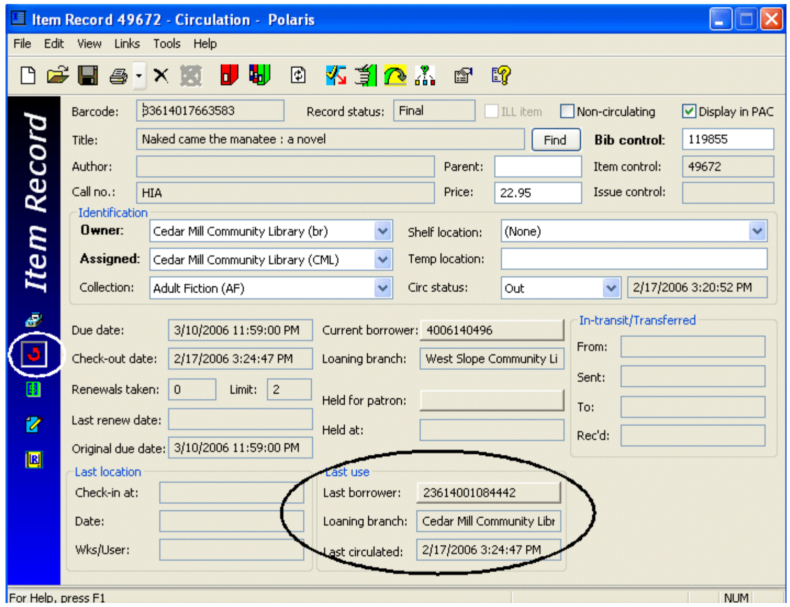


Blocked Item Icon in the Item Record Workform

When an item has a circulation block, the blue icon for the Notes and Notices view on the left side of the workform changes to red .

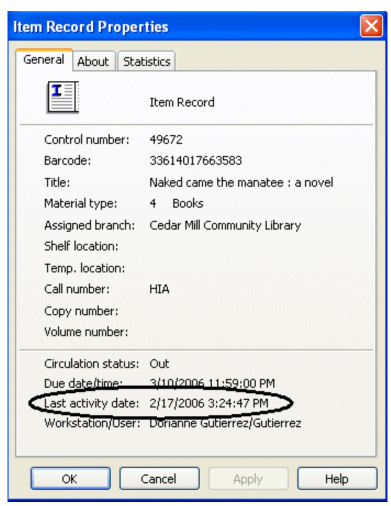
Circulation Fields in the Item Record Workform

A new **Last Circulated** field in the Item Record workform - Circulation view shows the last time an item was checked out or renewed. The information remains the same until the next check-out or renewal. You can also choose to display the last borrower's barcode. See "Borrower Links from the Item Record Workform" on page 90.

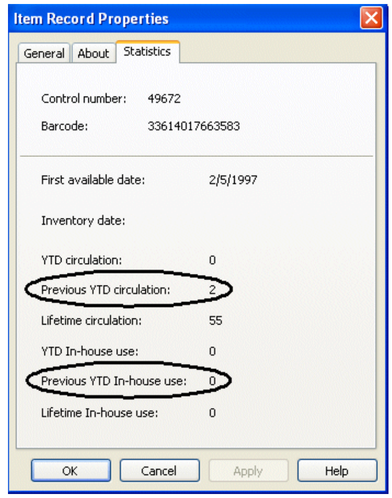


The **Rec'd** (received) field in the Intransit/Transferred fields is updated only when an item is checked in at its assigned branch. If it is checked in elsewhere and sent in transit again, the received field is left blank.

On the item property sheet - General tabbed page, the Last Activity Date field displays the last time *any* kind of circulation activity happened to the item.



The Statistics tabbed page now includes Previous YTD circulation and Previous YTD In-house use.

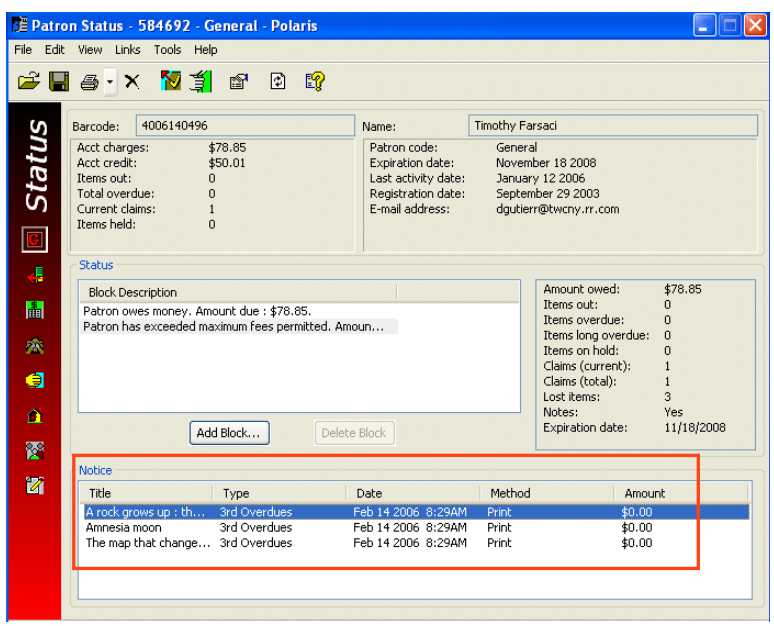


Notification

Polaris 3.3 includes the following improvements to notification and related workflows:

Notice History from the Patron Status Workform

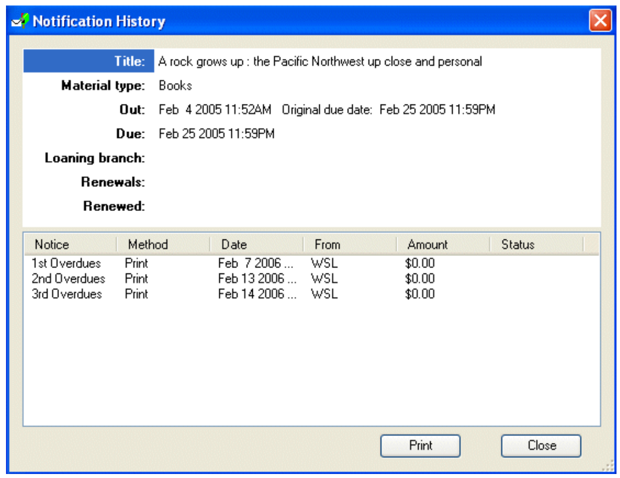
A new **Notices** section on the Patron Status Workform - General view shows the items for which the patron has received notices. You can right-click an item in the list to open the item record, or you can see the complete notice history for each item in the list.



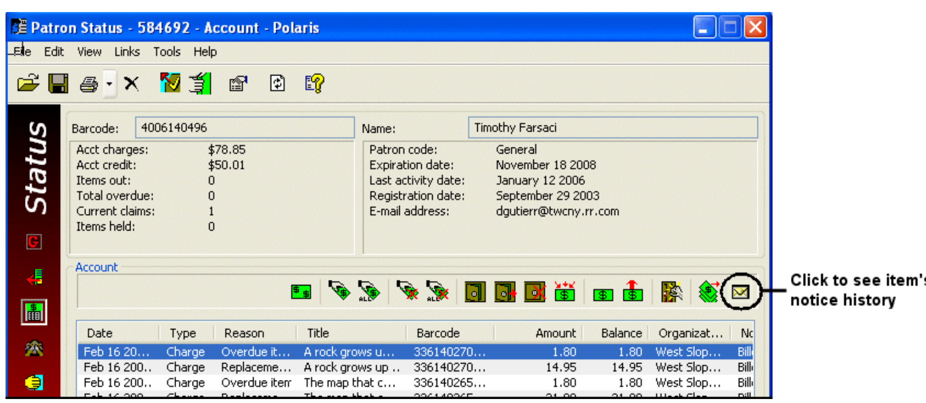
To see the notice history, double-click an item in the **Notices** list, or press **ALT+N.** The Notification History dialog box opens, displaying detailed notification history for the item. When the item has been checked in *and* all charges have been resolved, the notice history for that item is cleared.

Note:
If the item has not been checked in, the notice history is available even if the charges have been resolved. The history also remains available if there are multiple charges related to the item and not all have been resolved.

From the dialog box, you can print the notice history for an item.



In addition, you can view the notice history of any item in an items list on the Patron Status Workform, Items out, Account, and Claims views. Select the item and click (or press **ALT+N**) to open the Notice History dialog box.



A new branch-level Circulation permission, **Patron Status - Access Notice History**, controls access to the Notice History dialog box.

Cancelled Request Notices

As part of normal request pick-up notice processing, you can also send cancelled request notices for cancelled hold and ILL requests. These are sent when a request status changes from Active, Pending, or Inactive to Cancelled. A request status changes to Cancelled in these circumstances:

- The last item linked to a bibliographic record is deleted
- A purchase order is cancelled
- A request is manually cancelled from the staff client
- A request is cancelled from PAC

However, cancelled request notices are *not* sent in these circumstances:

- A request status changes from Held to Unclaimed, then changes to Cancelled.
- A Held item is checked out to another patron, and the original request is not reactivated.
- A staff member is prompted to hold an item to fill a request but declines to fill the request with that item, and chooses not to reactivate the request.
- An item is checked out to patron who has a request for it, and the request status is still Pending. The request is automatically cancelled because the patron has the item.

Also, if a request is accidentally cancelled, then reactivated for the same patron before notice processing, no cancellation notice is produced.

You can send cancelled request notices by any of the methods you selected when you set up notification. They are included in combined notices. Like request pick-up notices, cancelled request notices are sent according to the settings of the request's pick-up library. If you exclude a specific patron from receiving request pick-up notices, the patron is also excluded from receiving cancelled request notices. For setup details, see "Managing Notification" (Patron Services Administration topics) in staff client online Help.

Printing Notices for Multiple Branches

You can select multiple branches when printing overdue, bill, fine, hold request, and combined notices.

Sorting Notices

Reporting Branch is now a sorting option for overdue, bill, fine, hold request, and combined notices. Previously, these notices were *always* sorted first by reporting branch, then by any options the user set.

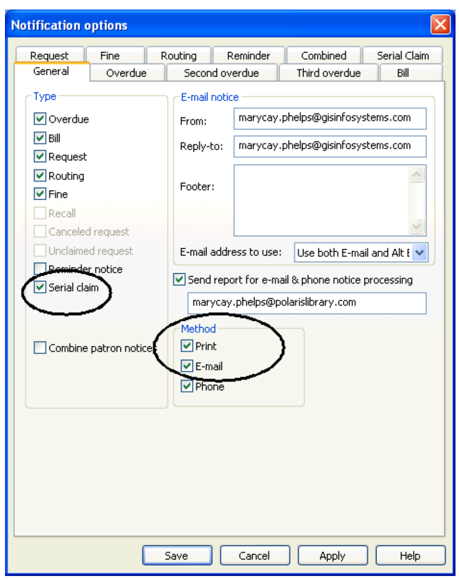
E-Mail Notices

- ❑ **Reminder notices** - "Almost overdue" e-mail reminder notices are sent from the patron's branch, not the item's transacting branch. The renewals column now lists how many renewals are left for each item, not how many times the item has already been renewed.
- ❑ **Summary report** - The e-mail summary report, which is sent automatically to the e-mail addresses you specified when you set up notification, now is also available from the Report Manager. Select **Utilities, Reports and Notices** on the Polaris Shortcut Bar to open the Report Manager. In the Report Manager, select **Notices, Email, Email_SummaryReport**. For more information about setting up notification, see "Managing Notification" (Patron Services Administration topics) in staff client online Help. For more information about running reports, see "Using Reports" (Polaris Basics topics) in staff client online Help.
- ❑ **Special announcements** - In the Polaris E-mail Manager for special announcements, the e-mail body is no longer limited to 1,000 characters. The maximum body length is 64 KB. Subject text has been expanded from 100 to 1,000 characters.

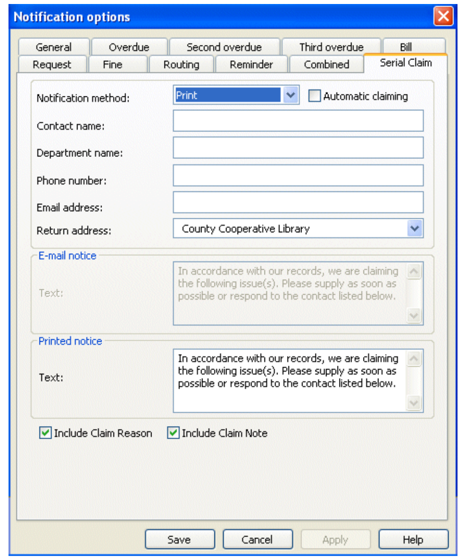
Serial Claim Notices

Polaris 3.3 includes serials claiming (see "Serials Claiming" on page 55). As part of this development, you can set up automated serial claim notification to suppliers.

Use the Notification parameter **Notification options** to set up serial claim notices. On the General tabbed page, select (check) **Serial claim** and select the possible methods you use to send the notices—print, e-mail, or both—if they are not already selected.



Then select the Serial Claim tab and set the options for your notices.



For details, see "Set up claiming notification" (Technical Services Administration topics) in staff client online Help. For general information about Polaris notification, see "Managing Notification" (Patron Services Administration topics) in staff client online Help.

Default Notice Delivery Method

The system-level Notification parameter **Active default notification delivery option** specifies the delivery method for notices when Patron Preference has been set as the delivery method for a particular type of notice but the patron record contains no preferred delivery method. The parameter affects only the notice queue, not the patron record itself. In Polaris 3.3, this parameter affects all types of notices. In previous versions, the parameter affected only hold notices.

Telephone Notification and Intercept Tones

Notification calls may fail when intercept tones are encountered. Sometimes intercept tones are legitimate causes for failure; they typically precede an operator message. However, intercept tones may also occur when a cellular phone is out of its service area or when telephone company switches are busy. The Dialogic® telephony board may also incorrectly identify certain human voices as intercept tones. In Polaris 3.2.570 and earlier versions, these calls were deleted from the call status log and converted to printed notices. In Polaris 3.2.571 and later, and in Polaris 3.3, an option has been added to retry a call that failed due to intercept tones. When this option is set, the phone notification service continues to try a call that has failed due to intercept tones until the maximum number of retries (set in Polaris Administration) has been reached. At that point, the call is converted to a printed notice. If you would like to have this feature enabled for your system, contact your Polaris Site Manager.

In addition, the "Max retries" message in the event log, for calls that have reached the maximum number of retries for any reason, has been changed from an Error event to an Informational event.

Exporting Notices to a Notification Service

If your library has a contract with an outside service to send notices, you can export overdue, bill, fine, and request pick-up notices directly to the vendor's FTP server, saving a copy of the export file to a local location you specify. This option is available at the system level only, so all branches must use the outside service to send their notices. The actual delivery method to the patron depends on the vendor's service, but is typically print. The following information from the patron record is included in the exported notices file:

- Last name, first name, middle name, title, suffix
- Patron barcode
- Patron code description
- Registered branch name
- Address for notices and bills (if none has been defined, the home address is used; if there is no home address, the first available address is used)
- Phone numbers
- E-mail addresses, primary and alternate

The following additional information is included for each notice type:

- **Overdue notices and bills** - Item title, author, material type, barcode, call number, due date, check-out location, check-out date, and overdue notice number. Bills also include any replacement cost, processing fee, overdue fine, and the patron account balance.
- **Fine notices** - Patron account balance and last activity date
- **Request notices** - Item title, author, material type, barcode, date held, held until date (unclaimed date)

The vendor specifies the notice text that is not drawn from the Polaris database.

Use the Notification parameter **Notification options** (General tabbed page) to specify which kinds of notices to export and to supply the Internet address, log-on name, and password for the vendor's FTP server.

Important:
The notification method must be sent to **Print** at the system, library, and branch levels for each type of notice you choose to export, if you want to export the notices from all organizations. If a branch-level method is set to e-mail or phone, the system produces notices according to that method. If the method is set to **Patron Preference**, and the patron's preference is set to **Print**, the notice is exported, but if the patron's preference is e-mail or phone, that method is used.

For details, see "Setting Up Notices" (Patron Services Administration topics) in staff client online Help.

Notice Processing SQL Job

A new database job, **NoticesProcessing.sql**, handles all daily processes related to notices. The following jobs have been deleted:

- **EmailManager.sql**
- **FineNoticesProcessing.sql**
- **OverdueNoticesNightly.sql**

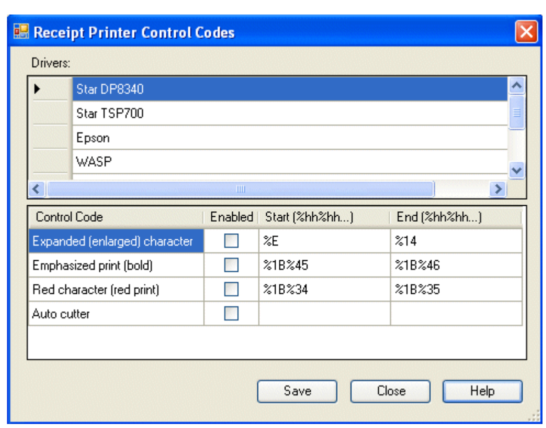
Issue Information for Serials Titles

When serials titles appear in lists of items on circulation workforms, dialog boxes, notices, and receipts, the issue information is included with the title.

Setting Receipt Printer Control Codes

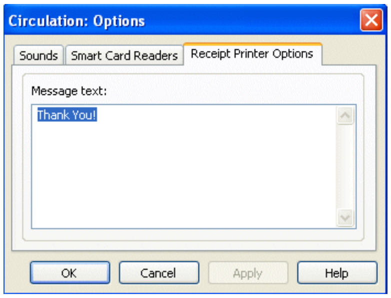
In previous versions of Polaris, receipt printer drivers were hard-coded in the Polaris application. In Polaris 3.3, using the new system-level Staff Client profile **Receipt printer control codes**, you can set large print, bold print, red print, and auto-cutting for receipt printers that support these features. Control codes for the features are supplied for a number of printers, and you can enable them as you wish. You can also add printer drivers to the list, specifying the appropriate control codes for the new printers. Consult your printer documentation for the appropriate codes.

Note:
Expanded affects in-transit and hold slips. On the in-transit slip, the destination branch's name is printed in a font that is twice as large as the font on the rest of the slip. On the hold slip, the patron's name and the unclaimed date are printed in the large font. Although you set this option for specific receipt printers, if you choose to print these slips on a page printer the font is also enlarged.

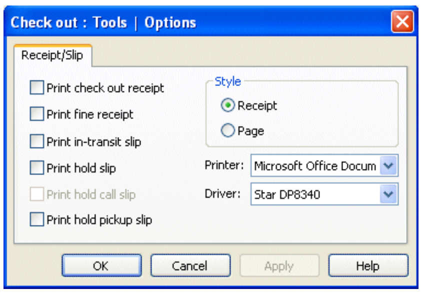


As part of this development, the following changes have been made in the staff client:

- You no longer set bold, red, or auto-cut features from the staff client Circulation Options dialog box (Polaris Shortcut Bar). Use the Receipt Printer Options tabbed page to customize the standard message text that appears on all receipts.



- You continue to set receipt printing from the **Tools, Options** menu (**CTRL+T**) for every workform where you print receipts and slips. The dialog box includes a new control, where you select the appropriate driver for your receipt printer.



Important:
Because printer drivers and control codes are now stored as part of the database, when you upgrade to Polaris 3.3 you must select the appropriate printer driver in the Tools Options dialog box for each workform where you print receipts and slips.

- If the printer is set to **Receipt** for the Patron Status workform, and you select **File, Print** or press **CTRL+ALT+P**, the items out list is formatted for the receipt printer. This is convenient for giving the patron summary information at the circulation desk where another printer may not be available. The **Workform** tab has been removed from the Patron Status Tools Options dialog box.

Fine Receipts Improved

The Paid/Waived line on fine receipts has been split into two separate lines, one for the amount paid and one for the amount waived. If a line amount is zero, the line is not printed.

In-Transit Slips Reformatted

In-transit slips, which print automatically when an item's status changes to In Transit or Transferred during a circulation transaction, have been reformatted. The destination library is centered at the top of the slip in bold upper case letters, if the printer supports bold print, and the slip is longer so that when the slip is placed in a book, the destination library shows over the top of the book.

Offline Processing Changes

Client Folder for Offline Files

The client folder for offline files has changed. Copy **PolPatron.mdb** and **PolSystem.mdb** from the server to the following folder in the offline client, instead of the **Polaris\3.3\bin** folder.

***Local drive*:\Program Files\Polaris\3.3\offline\polaris**

If you are using multiple offline clients, you must copy the files to each offline client. The folder ***Local drive*:\Program Files\Polaris\n.n\offline\polaris** is created by default when the staff client is installed. The offline transaction (.trn) files are also written to the new folder.

If a client is running multiple instances, you will need to create corresponding folders named **\Program Files\Polaris\n.n\offline*instance name*.** This allows multiple instances to run the Polaris client in offline mode, use the correct .mdb files for each instance, and write the .trn files to the correct directory, for easy upload processing when the client is back online, and the transactions need to be uploaded.

If you are upgrading from Polaris 3.2 to Polaris 3.3, copy the transaction files from the 3.2 **bin** folder to **\Program Files\Polaris\ n.n\offline\polaris.**

In a clustered terminal server environment, you can upload transaction files to any directory, anywhere on the network share. But you must first create the appropriate **Polaris\n.n\offline\polaris** folder in that directory, before you upload the files.

These changes make obsolete the requirement that Polaris offline files be in the same folder as polaris.exe, allowing you to restrict the permissions on that directory without interfering with offline processes.

Offline Upload Files Reformatted

Offline upload files are reformatted so that patron-specific information is printed only once if the same patron has more than one item checked in or out. The naming convention of the .trn files has been changed to add ***_wksname*** to the end of the file, instead of the workstation identification number, where ***wksname*** is the user's workstation name.

Pay-All and Waive-All Transactions

The transactions database logs each individual patron account action for pay-all and waive-all transactions, instead of logging the pay-all or waive-all action as one transaction. This change provides more detail in patron accounting reports.

Circulation Reports

The following new reports are available. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Circulation** in the Polaris Reports dialog box.

- **Item Circulation by Item Statistical Code** - For a specified date range, reports the number of items by statistical code that have been circulated, the number of check-out transactions, and the number of renewal transactions. Check-out transactions include those made in the staff client, offline/bookmobile, Polaris ExpressCheck, and SIP self-check. Renewals include these sources as well as renewals from PAC. The report is sorted by organization and statistical code. You can filter this report by organization.

Note:
See "Circulation Transactions and Circulation Statistics Reports" on page 85 for other improvements related to circulation reports.

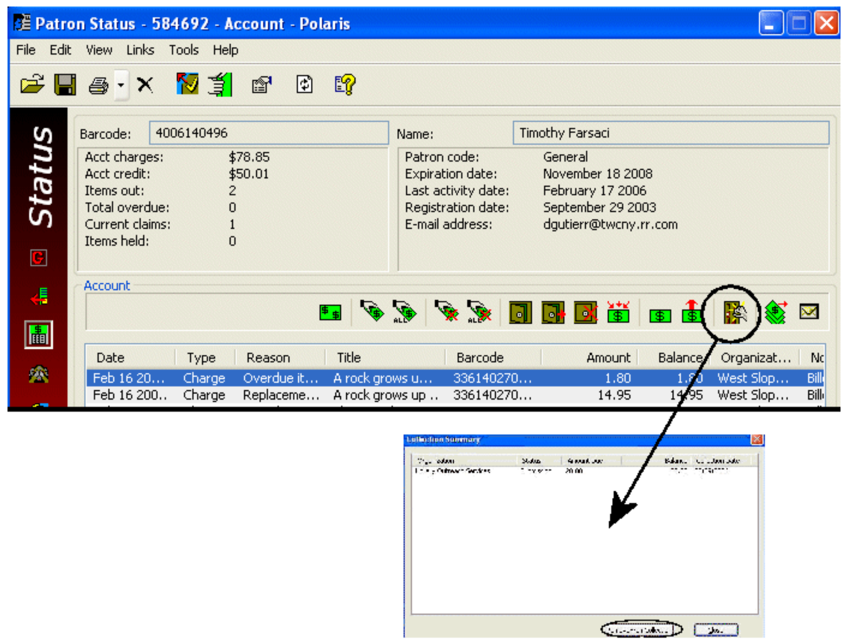
Collection Agency

Warning Message When Collection Agency is Turned Off

As in previous releases of Polaris, if **Enable collection agency** is cleared after being enabled in the Collection Agency Setup dialog box (Polaris Administration), the collection agency block is removed from all previously reported patron records. Then, if you check **Enable collection agency** again, the patrons are put back in collection and duplicate collection fees are placed on their accounts. Anyone that has paid amounts so the balance is under the threshold, but not down to 0.00, is not included. In Polaris 3.3, a warning message has been added when you clear the check box, and you can continue or cancel the action. As in previous releases, if you simply want to stop collection agency reporting for a period, click **Stop** in the Collection Agency Setup dialog box.

Permission to Remove Collection Agency Block

A new system-level Circulation permission, **Remove collection agency block**, is checked when you select **Remove From Collection** on the Collection Summary dialog box. The permission is set to Allow by default. The Collection Summary dialog box summarizes the charges on a specific patron's account that have been placed in collection; you open it from the Patron Status workform - Account view. The permission controls the ability to remove specific charges from collection agency reporting.



Outreach Services

The following improvements have been made to Polaris Outreach Services.

Duplicate Check-Outs Detected

If an item has been checked out to an active Outreach Services patron in the past, a message appears at check-out. You can continue to check out the item, or cancel the check-out. The check for duplicates is based on the patron's reading history. A title is considered a match if the control number in the bibliographic record of the item being checked out is the same as the control number in the bibliographic record of an item in the reading history.

Patron Preference Criteria Expanded

The buffer for patron preference criteria has been expanded, so you can set more patron preferences to include or exclude authors, subjects, and genres in selection lists. This development decreases the frequency of errors when you generate selection lists.

Selection List Size Limit Increased

The maximum length of an Outreach Services selection list is 100,000 records.

Note Field Increased

The height of the **Note** field on the Patron Status Workform - Reader Services view has been increased to display two lines of text at a time. You can enter a maximum of 255 characters.

Course Reserves

Entering Course Information

When you are creating a new course reserve record, you can use a new method for entering course information. On the course reserve record, select **Tools, Display All Available Courses**. The Available Courses dialog box appears, which lists the courses defined in Polaris Administration for the assigned branch. Select a course, and click **OK**. Course information from the course you selected fills the workform.

Searching for Course Reserve Records

You can limit searches for course reserve records by whether the record has a note, in addition to other options.

Searching for Reserve Item Records

You can limit searches for reserve item records by assigned branch, in addition to other options. The assigned branch is the assigned branch for the reserve item, which may differ from the assigned branch for the item when it is not on reserve.

Credit Card Payments - Staff Client, PAC, and Polaris ExpressCheck

You can accept credit card payments from the staff client, PAC, and Polaris ExpressCheck for charges on the patron account and donations to the library (PAC only). Polaris supports two credit card processing services: VeriSign® Payflow Pro, and Active Payment Manager (Class Point of Sale). Class Point of Sale credit card processing works only with the PAC. You can set up credit card processing at the system, library, or branch level; if your processor is VeriSign, you can make separate settings for the staff client, PAC, and Polaris ExpressCheck. To set up credit card processing in Polaris Administration, click the new parameter tab **Credit Card Payment** in the Administration Explorer; then double-click **Online Payments Configure**. For details, see "Setting Up Credit Card Processing" (Patron Services Administration topics) in staff client online Help. This parameter replaces the PowerPAC profile **Online Payments Configure** that was used to set up credit card processing for the PAC; if you implemented PAC credit card processing in Polaris 3.2, you do not need to re-enter your PAC settings.

VeriSign Service

To accept credit card payments through VeriSign, your library establishes an account with VeriSign directly, or with an e-commerce provider such as a bank that offers VeriSign Payflow Pro payment processing. For more information about setting up VeriSign processing in Polaris Administration, see "Set up VeriSign credit card payments" (Patron Services Administration topics) in staff client online Help. VeriSign processing works with Polaris in these ways:

Staff client - VeriSign credit card processing is available in the staff client by specific license. If your contract with Polaris Library Systems includes this feature, and you have activated it for the staff client, the staff member selects **Credit Card** as the payment method in those workflows that involve accepting payments from patrons. The staff member enters the credit card information manually or if the workstation is equipped with a credit card reader, the staff member swipes the card. A credit card transaction summary is printed on the fine receipt. If a staff workstation will use a credit card reader, you must select the credit card reader option when you install the Polaris staff client application on the workstation. For more information, see the *Polaris 3.3 Installation Guide*. You can view credit card transactions and issue refunds on credit card payments in the staff client. See "Managing Credit Card Transactions in the Staff Client" on page 107. Staff members need the new Circulation permissions **Fines: Allow credit card payments** and **Fines: Allow refunds** to accept VeriSign credit card payments and issue refunds on credit card accounts. A supervisor override dialog appears if the staff member does not have the refunds permission.

PAC - A logged-in patron can pay fines from the Fines and Fees page of the patron account. The patron selects some or all of the charges to pay and clicks **Pay fines now** to display the payment form. When the transaction is complete, the patron can receive an e-mail receipt that lists the charges paid. In the staff client (Patron Status workform - Account view), a transaction note indicates that payment was made through the PAC. You can also allow anyone to make a donation (minimum $1.00) by credit card. Users do not have to log in make a donation. The donations page is available from the Polaris PowerPAC dashboard. You can specify separate flat processing fees for fine and donation payments. (VeriSign credit card processing in the PAC was also available in Polaris 3.2, build 540 or later.)

Note:
If you plan to accept credit card payments from PAC, Secure Socket Layer (SSL) must be installed and active for your system. See "Secure Socket Layer (SSL)" (Polaris Administration topics) in staff client online Help.

Polaris ExpressCheck - The Polaris ExpressCheck workstation must be equipped with a credit card reader, and you must select the credit card reader option when you install the Polaris ExpressCheck application on the workstation. A logged-in patron can pay fines from the Fines and Fees page of the patron account. The patron selects some or all of the charges to pay and selects **Pay fines now** to display the payment form, then swipes the credit card. Also, if a patron owes more than the organization's Money Owed block amount, a Money Owed dialog box is displayed after the patron's barcode has been initially read and the patron has selected a language. In this case, the patron can select **Pay Now** to pay all the charges on the account. In either case, when the transaction is complete, the patron can receive an e-mail receipt that lists the charges paid if there is an e-mail address in the patron record. In the staff client (Patron Status workform - Account view), a transaction note indicates that payment was made through Polaris ExpressCheck.

Two new reports help you track VeriSign credit card payments. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Patron Financial** in the Polaris Reports dialog box:

- **Donations - Credit Card Payments** - Lists donation payments, including details such as the amount, the purpose, whether the donor wants a printed acknowledgement and if so, the donor's address; includes credits and voided transactions. You can filter this report by a date range and by organization. The report includes subtotals by organization. The organization is the branch the donor has designated to receive the gift. Use this report to distribute donations to the appropriate organizations. Run the report at the system level to view voided transactions.
- **Fines and Fees - Credit Card Payments** - Lists payments for charges, including details such as each patron's total payment credit transaction ID, as well as individual charges and processing fees, the items associated with charges, and the patron barcode. Declined transactions, credits, and voided transactions are also

listed. You can filter this report by a date range and by organization. The report includes subtotals by organization. The organization is the organization associated with individual charges on the patron's account.

Class Point of Sale

Active Payment Manager (Class Point of Sale) software manages cash, check, and credit card payments for the library and other agencies in the network. If your library participates in a Class Point of Sale network, you can set up PAC credit card payments through Class Point of Sale. For information about general Class POS requirements, regardless of whether you use Class POS for credit card payments, see "Active Payment Manager (Class Point of Sale) and Polaris" on page 108. With Class POS processing, a logged-in patron can pay fines from the Fines and Fees page of the patron account. The patron simply clicks **Pay fines now**. The Class POS payment form opens, where the patron supplies the appropriate credit card information and completes the payment. The patron cannot select specific charges to pay, and Class POS does not support donations. For more information about setting up Class POS processing in Polaris Administration, see "Set up Class Point of Sale credit card payments" (Patron Services Administration topics) in staff client online Help. (Class Point of Sale credit card processing in the PAC was also available in Polaris 3.2, build 554 or later.)

Managing Credit Card Transactions in the Staff Client

Your library may accept credit card payments from the PAC, the staff client, or Polaris ExpressCheck through the VeriSign Payflow Pro service (see "Credit Card Payments - Staff Client, PAC, and Polaris ExpressCheck" on page 105). You can view these transaction details and refund payments made with a credit card, using the Credit Card Payments Manager in the staff client. You can also refund credit card payments from registered patrons through the Patron Status workform - Account view. However, you cannot refund credit card payments as cash. The refund transaction always becomes a refund in the patron's credit card account. Staff members need the new Circulation permission **Fines: Allow refunds** to refund credit card payments to the credit card account.

To use the Credit Card Payments Manager, select **Utilities, Credit Card Payments Manager** from the Polaris Shortcut bar. You can search for specific orders or transactions within a date range, or by specific reference ID. For details, see "Managing Credit Card Orders" (Patron Services topics) in staff client online Help.

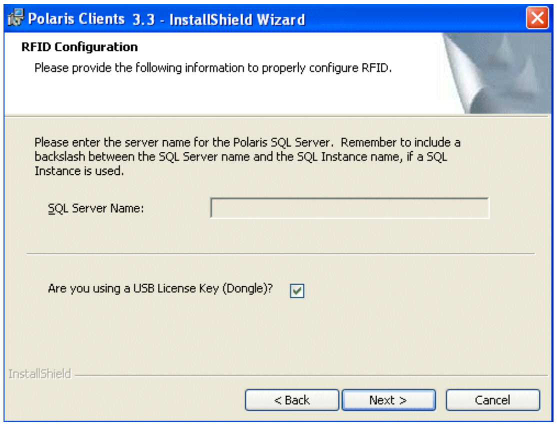
Active Payment Manager (Class Point of Sale) and Polaris

Active Payment Manager (Class Point of Sale) software manages cash, check, and credit card payments for the library and other agencies in the network. In versions of Polaris 3.2 earlier than build 554, library staff could enter a patron payment in Class Point of Sale (POS), and the transaction would be recorded in the patron's account in Polaris. In Polaris 3.3 and Polaris 3.2 build 554 or later, the two applications are more closely integrated for a smoother workflow in the Polaris staff client. Also, patrons can now pay their fines by credit card in Class POS through Polaris PowerPAC. See "Credit Card Payments - Staff Client, PAC, and Polaris ExpressCheck" on page 105. When a payment is made through Class POS, either from the Polaris staff client or the PAC, the transaction is recorded in the patron's account in Polaris.

For information about setting up the Polaris staff client to work with Class Point of Sale, see "Using Class Point of Sale with Polaris" (Patron Services Administration topics) in staff client online Help. For information about taking credit card payments in Class POS from the PAC, see "Set up Class Point of Sale credit card payments" (Patron Services Administration topics) in staff client online Help.

RFID Circulation - Support for Bibliochip™ USB Dongle

A USB dongle is a hardware key that plugs into a USB port on a computer. A software application accesses the dongle for license verification before continuing to run. Polaris 3.3 supports the use of a USB dongle to authorize the use of Bibliochip RFID software. (This feature is also available in Polaris 3.2, build 549 or later.) When you install Polaris on a staff client computer, and select to install RFID, you indicate whether you use the USB dongle on the RFID Configuration screen.



If you use Bibliochip RFID software, but do not use the USB dongle for authorization, clear (uncheck) the **USB License Key** check box. In this case, you will have to obtain authorization from Bibliotheca for each staff client computer that uses RFID. For more information, see “Obtain the Bibliotheca activation code” (Patron Services Administration topics) in staff client online Help.

Polaris ExpressCheck

The following improvements have been made to Polaris ExpressCheck.

Credit Card Payments from Polaris ExpressCheck

If the Polaris ExpressCheck workstation is equipped with a swipe credit card reader, and you select the credit card reader option at installation, you can accept credit card payments for fines and fees. To accept credit card payments, your library must establish an account with VeriSign® directly, or with an e-commerce provider such as a bank that offers VeriSign Payflow Pro payment processing. Then, you set up Polaris for VeriSign credit card payment processing. See "Credit Card Payments - Staff Client, PAC, and Polaris ExpressCheck" on page 105. You can set up error reporting for cases where a credit card refund was not successful when the system attempted to resolve a lost or billed item charge at check-out. See "Error Reporting" on page 11.

Check-Out Receipt Improved

The branch shown on the check-out receipt is the check-out branch, not the patron's registered branch. The specific information included on the check-out receipt is determined by the branch's Polaris Administration settings for check-out receipts. You set these fields with the Patron Services parameter **Check-out: Receipt options**. For details, see "Setting Up Circulation Receipts" (Patron Services Administration topics) in staff client online Help.

Support for Non-Standard Barcodes

Your barcode scanner and Polaris ExpressCheck may not handle certain non-standard proprietary barcodes properly. In Polaris 3.2.571 or later and Polaris 3.3, a conversion script, **follett_barcode.vbs**, is available to convert Follett barcodes; by default, the script is placed in **C:\Program Files\Polaris\x.x\Bin** when you install the Polaris ExpressCheck client software on the ExpressCheck workstation. You can create custom scripts to convert other non-standard barcodes; contact your Polaris Site Manager for assistance. The custom script should be placed in the **\Polaris\x.x\Bin** folder. If you are using the Follett conversion script or a custom script, you provide the path and filename of the conversion script on the Polaris ExpressCheck Setup screen. This function does not apply to RFID barcodes.

French Language Support

A Polaris license for French is available for Polaris 3.3 and Polaris 3.2.540 or later. Contact your Site Manager for information about obtaining a license. In the Polaris ExpressCheck messages file EC_messages.xml, default French message strings are identified by the language ID 3084. For information about customizing Polaris ExpressCheck messages, see the *Polaris ExpressCheck Administration Guide*.

Quick-Circ (Ephemeral) Item Check-Out

In Polaris 3.3 and Polaris 3.2.578 or later, you can scan multiple quick-circ items with duplicate barcodes. This allows a patron to scan a barcode from an index card, for example, when checking out ephemeral items such as paperback books. For each item scanned, the screen displays the message **Uncataloged material:*material type***. This text is stored in the EC_messages.xml file. The receipt prints one line for each quick-circ item barcode scanned, identifying the item as **Uncataloged item**.

Polaris PAC Applications

Polaris 3.3 includes major changes to Polaris PowerPAC; Polaris PowerPAC Children's Edition and Polaris ActivePAC have been updated as well. In this section, a marginal note indicates which PAC applications are affected by each change.

Note:
See "Hold and Interlibrary Loan Requests" on page 66 for information about developments that affect requests from PAC.

AJAX Programming

Polaris PowerPAC

Polaris PowerPAC version 3.3 has been re-designed based on AJAX (Asynchronous JavaScript and XML) programming. AJAX allows Web pages to be updated dynamically, without the need to refresh the entire page in the browser, and background processing can occur while the user still has use of the page. For example, when a Polaris PowerPAC user clicks the **Add to My List** link for a title, the server is notified that the user has added a title. In the actual Web page, the Title List in the dashboard is updated and a check mark graphic appears by the link in the results list to indicate the title is on the list. Without AJAX, the entire page was re-rendered on the server and sent back to the client. The change to AJAX improves processing time, display latency, bandwidth usage, server CPU cycles, and client workflow. This change especially benefits patrons with dial-up Internet service. AJAX-compatible browsers include Microsoft Internet Explorer®, Netscape® 6 and above, Safari™, Firefox®, and Mozilla.

MARC Record Format in PAC

Polaris PowerPAC
Polaris PowerPAC Children's Edition
Polaris ActivePAC

The Polaris Z39.50 search provider now returns MARC records in XML format, as defined and maintained by the Library of Congress, instead of HTML format. This change allows custom formatting in the Polaris PAC applications.

Deep Links in Polaris PowerPAC

Polaris PowerPAC

Deep links allow searches for specific bibliographic records in your PAC from external sites. Such searches are launched, for example, when you use the PAC look-up feature on the sites of book and material vendors. In Polaris 3.2, the Polaris PowerPAC syntax was improved. In Polaris 3.3, the access points **UPC** and **OCLC** have been added. These facilitate searches from vendors of non-print items such as audio-visual materials. For detailed information about deep link syntax and access points, see "Deep Links to Polaris PowerPAC" (Public Access Administration topics) in online Help.

Pop-Up Windows Eliminated

Polaris PowerPAC

Polaris PowerPAC no longer relies on pop-up windows to display certain kinds of content:

Note:
E-sources are still displayed in a separate browser window to avoid issues with e-source targets that use a POST request format.

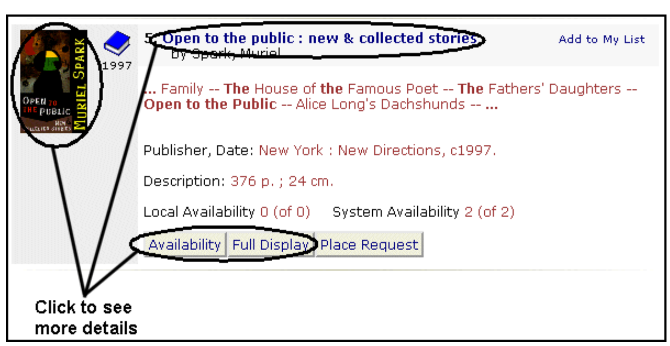
Web Sites

When you click the globe icon for a title in the search results, the Web site opens in a frame within Polaris PowerPAC. You can navigate in the Web site using the browser forward and back controls and any links offered within the Web site itself. To return to the PAC search results list, you click a link above the frame.

Note:
Occasionally a link in an external Web site may open a new browser window that takes over the top window in the browser. This situation is outside the control of Polaris. In this case, you must click the browser back button to return to Polaris PowerPAC.

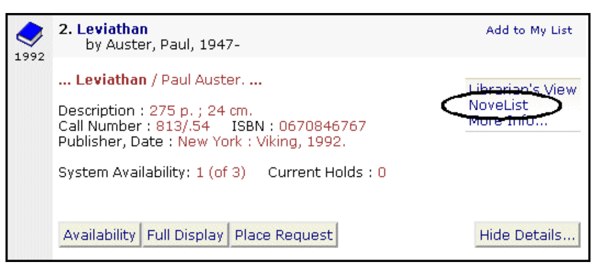
Enriched Data

The **More Info** link has been eliminated. Instead, click the title itself, the **Availability** or **Full Display** button, or a book jacket image to see more information about the title, then click an enriched data link such as **Reviews**. The enriched data opens below the title information instead of in a pop-up window.



NoveList Site

To access NoveList, you click the title itself, the **Availability** or **Full Display** button, or a book jacket image, to see more details. Then click **NoveList**.



The NoveList Web site opens in a frame within Polaris PowerPAC. You can navigate in the site using the browser forward and back controls and any links offered in the NoveList site. To return to the PAC search results list, you click the link above the frame.

Polaris PowerPAC
Polaris ActivePAC

If you have a contract with NoveList but no other enriched data provider, set the PAC profile **Enrich data: enable** to **No.** The NoveList link will display correctly without the "missing" book cover images that were an issue in previous versions.

Note:
Polaris 3.3 also supports NoveList's Similar Titles feature. See "Find More Like This (NoveList Similar Titles)" on page 149.

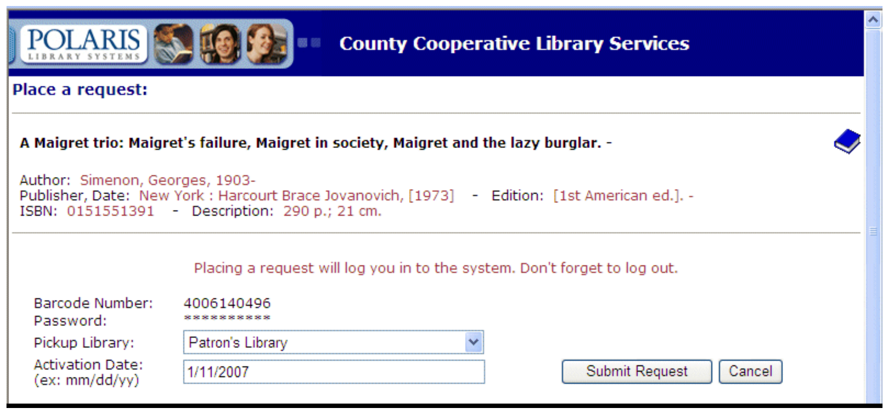
MARC Record View (Librarian's View)

Polaris PowerPAC

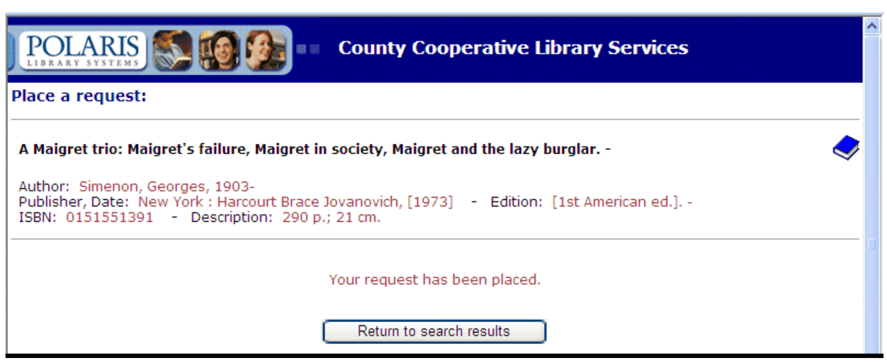
In previous versions of Polaris PowerPAC, you clicked the format icon to display the MARC view of a title in a pop-up window. In Polaris PowerPAC 3.3, click the title itself, the **Availability** or **Full Display** button, or a book jacket image, to see more details. Then click **Librarian's View**. The MARC view is displayed directly below the title information. A new PowerPAC administration profile, **Librarian's (MARC) View: Enable**, available at the system, library, or branch level, displays or suppresses the **Librarian's View** link. The link is displayed by default.

Request Forms

Hold and ILL request forms open as a page within Polaris PowerPAC.



You can click **Return to search results** when the request has been placed.



Page Banner and Controls Redesigned

Polaris PowerPAC

The default banner logo has been replaced, and you can use the new PowerPAC profile **Alternate Logo (URL)**, available at the system, library, or branch level, to replace the default logo with your own image. Simply supply the URL for your image, instead of overwriting the default file on the Web server. Your image is automatically sized appropriately.

Primary menu options appear as selectable tabs. Certain themes have gradient background colors. Overall, the pages have a cleaner and more open appearance. The illustration shows the portal page (Classic theme).

If your library allows a single log-in for the session, and the patron is logged in, the patron's name is now displayed by the **Log Out** link at the top of the page.

Custom Content on the Portal Page

Polaris PowerPAC

You can offer custom content on the Polaris PowerPAC portal page instead of news links and the weather magnet in that area of the page. If you decide to offer both news/weather and custom content, the news and weather section appears below your custom content. If neither is enabled, the portal page is blank (white) in that area. Use the new PowerPAC profile **Portal custom content (URL)**, available at the system, library, or branch level, to specify the complete URL, beginning with **http://**, to your content. The HTML content from the page you specify will be displayed in the custom content area on the portal page. You can include elements such as links and graphics, but be sure the source HTML specifies an absolute path for these elements.

If you use Polaris Bookstore, you can use the custom content option to promote the bookstore. For more information about Polaris Bookstore, see "Polaris Bookstore" on page 151.

Switching Connection Branches

Polaris PowerPAC

Branch header control - The header control that allows patrons to select a branch has changed. The words **Currently logged into** have been eliminated. The current branch is displayed, and the selection list is headed by **Switch to another branch**. As in previous versions, use the PowerPAC profile **Branch switching enable** to set whether this feature is available .

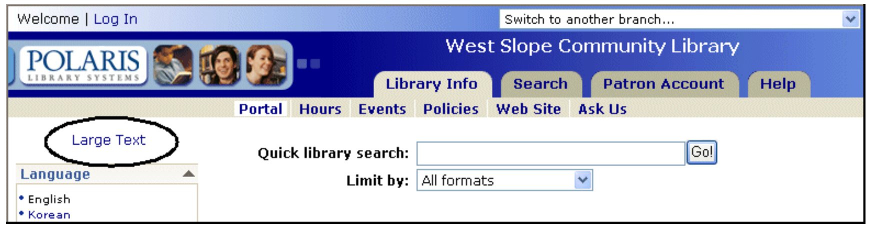
Page display - To better accommodate page customization at the branch level, when a patron selects a different branch the main Polaris PowerPAC page is displayed.

Branch display order - When you allow branch switching, you can set the display order of the list of branches with a new PowerPAC administration profile, **Currently Logged Into List Alphabetical Order**, available at the system, library, or branch level. Set this profile to **Yes** to display the branch names in ascending alphabetical order by name. Set the profile to **No** (the default) to display the branch names in ascending numerical order by internal organization ID, as in previous versions of Polaris PowerPAC. With either setting, the system organization is always first. The new profile also controls the display order of branches on the search options page, the self-registration page, and the donations page. The setting for the current connection branch is used. The profile also controls the display order of the list of pick-up libraries for requests, but in this case the setting for the patron's registered branch is used.

Large Text Link

Polaris PowerPAC

You can click **Large Text** at the top of the dashboard area to expand the font on the screen.



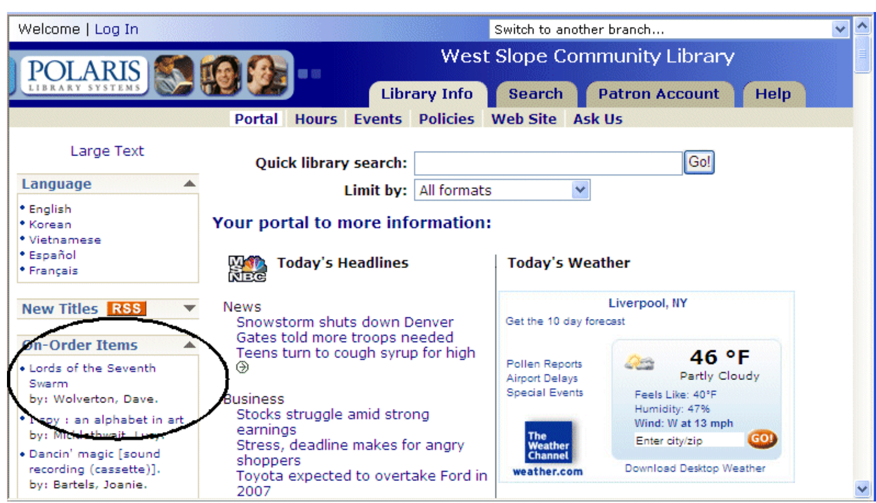
Click **Regular Text** to reduce the font to its normal size.

An additional style sheet, **styles_lp.css**, has been added to each theme folder to accommodate this development.

On-Order Items Web Part (Dashboard)

Polaris PowerPAC

A new On-Order Item Web part is available for the dashboard. The On-Order Items Web part elements are links that launch searches for titles in the Polaris database that have linked items with a status of On Order.



By default, 20 titles are listed; the title that has the linked item with the most recent status change to On Order is listed first. If more than one On-Order item is associated with a bibliographic record, the most recent On-Order item is used to order the list. Only titles that are marked for display in PAC are listed. This Web part is updated as part of the nightly Dashboard_NewTitles job. Because processing depends on a new circulation status date field, only those titles whose status change to On Order has occurred *after your Polaris 3.3 upgrade* are included.

For more information about Web parts, see "Defining Web Parts for Dashboards" (Public Access Administration topics) in staff client online Help. You can set the number of items that are automatically listed in the Most Circulated, New Titles, and On-Order Items Web parts. See "Limit items in Polaris and third-party lists" (Public Access Administration topics) in online Help.

Number of Titles in the New Titles Web Part

Polaris PowerPAC

The New Titles Web part in the Polaris PowerPAC dashboard area lists links that launch searches for titles recently added to your catalog. The links are organized in categories such as New Books and New Videos. In previous versions, the New Titles Web part listed all titles in each category added to the catalog in the past 31 days. Now you can limit the number of titles that are listed in each category. Use the system-level PowerPAC profile **Dashboards: Web part construction.** On the Polaris and 3rd Party tabbed page, select **New Titles** in the Web Parts list. Type zero (0) in the **Total Listing Rows** box to display *all* titles in each category added to the catalog in the past 31 days, or type the maximum number of titles that should display in the list for each category. For example, a setting of 25 displays only the most recent 25 titles in any category of those added in the last 31 days. For more information about setting up Web parts, see "Defining Web Parts for Dashboards" (Public Access Administration topics) in staff client online Help.

RSS Feeds Improved

Polaris PowerPAC

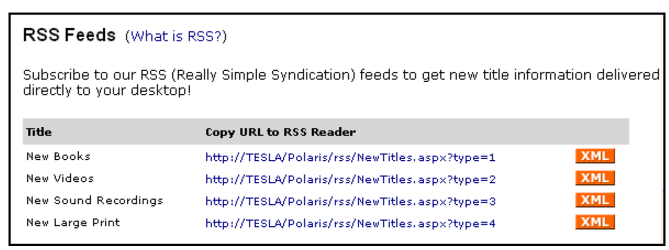
Polaris 3.2 introduced the ability to set up RSS feeds for new titles from Polaris PowerPAC. For Polaris 3.3, feeds have been verified with the following aggregators and readers:

- FeedReader 2.9
- rssReader 1.0.88
- SharpReader 0.9.5.1
- myYahoo.com
- Bloglines.com

In Polaris 3.3, if the patron subscribes to the feed while connected to the system organization, the RSS feed supplies all new titles in the system. If the patron subscribes to the feed while connected to a branch organization, the RSS feed supplies all new titles for the branch.

The New Titles dashboard with RSS feeds has been improved. An orange RSS icon indicates that the feeds are available. Patrons can click the icon to set up feeds, or click **What's RSS** for more information about how to set up RSS feeds and where to find readers.

When you click the RSS icon, the RSS feeds are listed in the center area of the page. If you have a Windows-based reader such as SharpReader, you can drag the orange XML icon for each feed you want to your reader. If you have a Web-based RSS news reader such as My Yahoo!, you copy the URL for the feed and paste it into the appropriate field on the RSS set-up page for the Web location.



In addition, when RSS is enabled, the header of the Polaris PowerPAC default.aspx page includes link tags that contain the RSS URLs. This allows RSS-aware browsers such as Firefox® to automatically recognize the RSS feeds when the user navigates to the portal page. Also, certain RSS programs such as SharpReader allow the user to enter the main URL of the Web site. For these programs, the patron can enter the main Polaris PowerPAC URL. The RSS program recognizes the links in the header and subscribes to the feeds automatically.

Type of Material Icons Altered

Polaris PowerPAC
Polaris PowerPAC Children's Edition
Polaris ActivePAC

The type of material icons in PAC search results are slightly smaller to improve the appearance of the search results page. The videotape icon has changed in response to customer request. The new icon is .

Polaris PowerPAC Name in the User Interface

Polaris PowerPAC

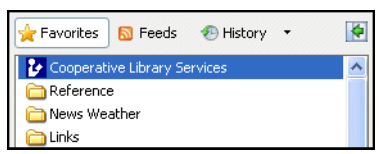
The term **Polaris PowerPAC** has been removed from the Polaris PowerPAC page <title> tags, so when a patron bookmarks the site, the library to which the patron is connected shows in the bookmark instead of the product name. Also, use of the product name has been minimized in the user interface and in online Help.

Library Icon in Browser Address Bar

Polaris PowerPAC
Polaris PowerPAC Children's Edition

The blue library icon 

appears in the browser address bar for the main PAC pages. The icon is also stored with the favorites link in several common Web browsers, such as Internet Explorer, Firefox, and Safari.



Diacritic Characters Available

Polaris PowerPAC
Polaris PowerPAC Children's Edition
Polaris ActivePAC

You can insert diacritic characters in messages and news headings, and in the labels for categories and search targets in Polaris PowerPAC Children's Edition. On the Language Strings dialog box, click **Diacritics**. The Character Picker dialog box appears, where you select a graphic character set, then choose the character. For more information, see "Editing Messages and News Headings" and "Managing Search Categories" (Public Access Administration topics) in staff client online Help.

French Language Support

Polaris PowerPAC
Polaris PowerPAC Children's Edition

A Polaris license for French is available for Polaris 3.3 and Polaris 3.2.540 or later. Contact your Site Manager for information about obtaining a license. For Polaris PowerPAC, the default French language file is **Polaris/PowerPAC/languages/French.xml.** For Polaris PowerPAC Children's Edition, the default French language file is **Polaris/PowerPAC/children/languages/French.xml.** French message strings are identified by the language ID 3084. For information about customizing Polaris PowerPAC and Polaris PowerPAC Children's Edition messages, see "Editing Messages, Labels, and News Headings" (Public Access Administration topics) in staff client online Help.

Custom Language Files

Polaris PowerPAC
Polaris Powerpac Children's Edition

As in previous versions, you can customize text strings in Polaris PowerPAC and Polaris PowerPAC Children's Edition, and save your changes in custom language files that preserve your changes from being overwritten. These custom files, with the default versions, were located in **Polaris/PowerPAC/languages** and **Polaris/PowerPAC/children/languages** on the PowerPAC server. In Polaris 3.3, new folders separate your customized language files from the default files so you can work with your files more conveniently:

- Polaris PowerPAC - **Polaris/PowerPAC/custom/languages**
- Polaris PowerPAC Children's Edition - **Polaris/PowerPAC/custom/children/languages**

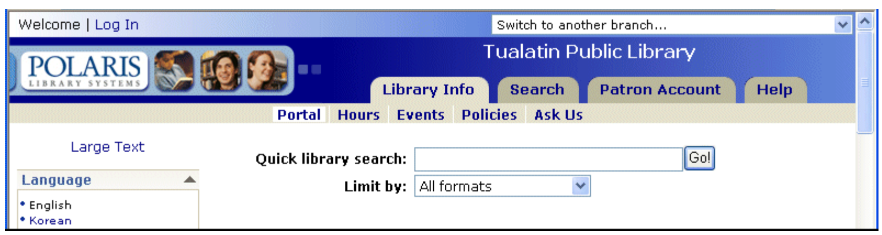
Important:
Before you upgrade to Polaris 3.3, move any existing custom language files to a backup location. After the upgrade, place them in the new custom folders.

For more information about editing language files and preserving your changes, see "Customizing Language Files" (Public Access Administration topics) in staff client online Help.

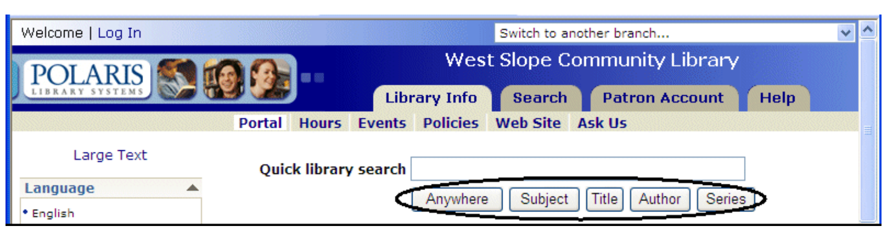
Quick Search Improvements

Polaris PowerPAC

As in previous versions of Polaris, the default quick search on the portal page launches a keyword search in any field. In Polaris 3.3, you can set the search field, the default search filter (**Limit by**), the database to search, and the sort order for results in Polaris Administration, although patrons cannot specify these options for the quick search. See "Availability Search Filter" on page 126.



In Polaris 3.3, you can choose to offer an alternative quick search that includes optional buttons instead of a search filter. The patron types the search text and clicks a button to launch a particular type of search. You can offer **Anywhere**, **Subject**, **Title**, **Author**, and **Series** buttons, and for the latter four, specify whether a keyword or browse search should be launched.

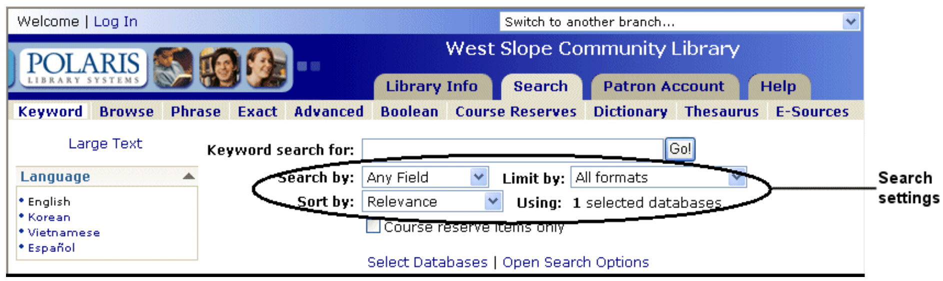


Use the new PowerPAC profile **Quick search button configuration** to set up the quick search with option buttons at the system, library, or branch level. The settings for the organization to which the patron is connected determine the availability of this feature. For details, see "Customizing Portal Page Features" and "Set up quick search with option buttons" (Public Access Administration topics) in staff client online Help.

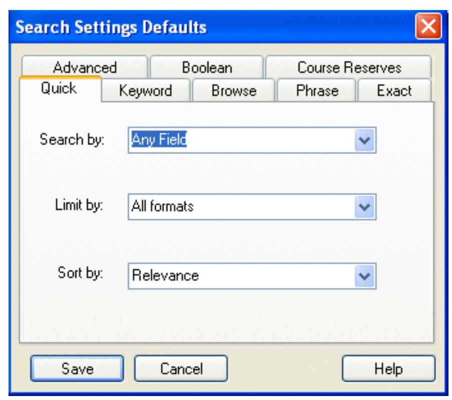
Controlling Default Settings by Search Type

Polaris PowerPAC

As in Polaris 3.2, patrons can set various options for each type of search in Polaris PowerPAC. For example, for keyword searches, patrons can set a search field, search filter, search database, and sort order for the results. In Polaris 3.3, you can specify the default settings for the search field, search filter, and sort order.



The PowerPAC profile **Search settings defaults** in Polaris Administration controls the default selections. Set the defaults for each search type you offer in Polaris PowerPAC.



- ❑ **Quick search** - You can set the default search field (**Search by**), the default search filter (**Limit by**), and the default sort order (**Sort by**). Patrons cannot select a search field for quick searches or a sort order when they do quick searches, so your settings apply to every quick search when this organization is the current branch.

  Note:
  The available **Limit by** selections depend on the organization's settings in the PAC Limit By Display policy table. See "Setting Up Search Filters" (Public Access Administration topics) in staff client online Help.

- ❑ **Keyword, phrase, exact, and advanced searches** - The same options are available for each of these search types. You can set separate defaults for each type.
- ❑ **Boolean search** - You can set the default sort order.

- ❑ **Browse search** - You can set the default search index.
- ❑ **Course reserve search** - You can set the default search field. This option is available only if your system includes course reserve functions.

See ”Specifying Default Search Settings” (Public Access Administration topics) in staff client online Help for details.

Availability Search Filter

Polaris PowerPAC

A new **AVAILABILITY** access point has been added to PAC searching. You can use this access point to set up a search filter that allows patrons to limit search results to titles that have at least one linked item that is available. The patron selects the filter in the **Limit by** list before launching the search. If the connection is at the system level, the search results include all titles that have at least one linked item that is available. If the connection is at the branch level, the results include all titles that have at least one linked available item assigned to that branch or the other branches defined as **Local** in the Item Availability Display Order table for the branch. (At either level, items with a suppressed circulation status are not included, and items where **Display in PAC** is not checked in the linked bibliographic record are not included.)

To set up an availability search filter for the Limit by list, open the **PAC Limit by Display** policy table for the organization. Click  in the PAC Limit By Display table. The Insert PAC Limit By Display dialog box appears. Type a name for your availability filter in the **Description** box. This name will appear in the **Limit by** list in Polaris PowerPAC. In the **CCL Filter** box, type the following command:

AVAILABILITY > 0

Then click **OK**. The Insert PAC Limit by Display dialog box closes, and the table displays your changes. For more information about setting up the **Limit by** list, see ”Setting Up Search Filters” (Public Access Administration topics) in staff client online Help.

The **AVAILABILITY** access point is also available as a Boolean search access point in the PAC. For example, the following search for Harry Potter titles filters out all records that do not have at least one available item:

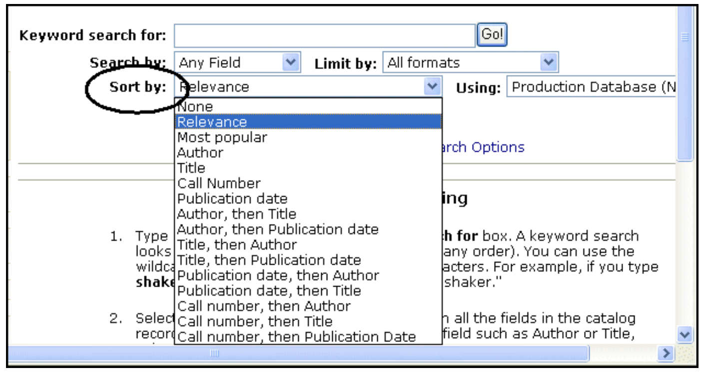
TI = Harry Potter AND AVAILABILITY > 0

The **AVAILABILITY** access point works only for values greater than 0. (**AVAILABILITY = 0** is not valid.)

Sorting Options

Polaris PowerPAC

The primary and secondary sort order options for search results have been removed from the Search Options page. The secondary sort options have been incorporated in the list of sorting options available when you set up a search. The illustration shows the list on the keyword search page.



Relevance and **Most Popular** are sorted by most relevant and most popular first. Publication dates are sorted by most recent first. Other options are sorted in ascending order.

Sorting by call number depends on the situation:

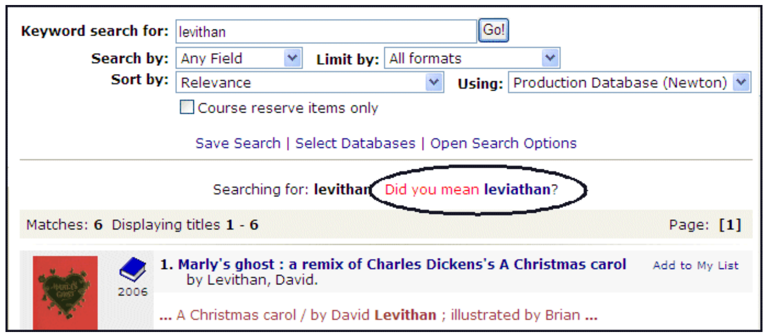
- When the connection organization is the system, call numbers are sorted by the best bibliographic-level call number, which is programmatically determined.
- When the connection organization is a branch, call numbers are sorted by the best item-level call number, also programmatically determined. This makes the results consistent with the call numbers displayed in the brief title view.
- Records without call numbers appear last in the sorting order.
- When the connection organization is a branch, and there are no item records associated with a bibliographic record, there may be a serial-level (issue) call number. However, this call number is ignored for sorting purposes.

All sort options, including those with primary and secondary sorts, are available as default settings for various types of Polaris PowerPAC searches. See "Availability Search Filter" on page 126.

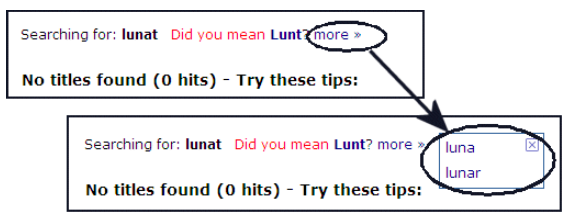
Did You Mean Search Term Checking

Polaris PowerPAC
Polaris PowerPAC Children's Edition
Polaris ActivePAC

The spell-checker has been replaced by "did you mean" search term checking. The search results page includes a best-suggestion alternate search term or terms if any can be identified. You can click the alternate term to launch a search on that term. (The illustration is an example from Polaris PowerPAC).



If more than one alternate suggestion is returned, you can click a **more** link to see other suggestions (up to five).



For single words, the "best suggestion" is the similar keyword that most frequently occurs in the Polaris database. For phrases, the system checks a new search suggestions table that is based on title and subject headings in the database. A new SQL job, **Did You Mean Processing**, runs once a month to populate the keyword counts and search suggestions tables.

The "Did you mean" function applies to quick, keyword, phrase, and exact phrase searches in ActivePAC and Polaris PowerPAC, and to searches typed in the **Look for** bar in Polaris PowerPAC Children's Edition.

In Polaris Administration, two new PAC profiles control Did You Mean suggestions. **Did You Mean: Enabled** specifies whether Did You Mean search suggestions are displayed in Polaris PowerPAC, Polaris PowerPAC Children's Edition, and ActivePAC. **Did You Mean: Suggestions are to display even when hits are returned** specifies whether Did You Mean search suggestions are displayed with search results (Y), or only when a search returns no hits (N). This profile does not apply to Polaris PowerPAC Children's Edition.

You can also set override suggestions for specific terms using the new database table, **Did You Mean Overrides**. You type the search term as your patrons may enter it, and specify an override phrase that you want to be displayed instead of any system-generated suggestion.

Example:
A unique local place name is commonly misspelled. You can enter the common misspelling in the **Phrase** box, and the correct spelling in the **Override Phrase** box. Your override phrase will always be suggested for the misspelled term.

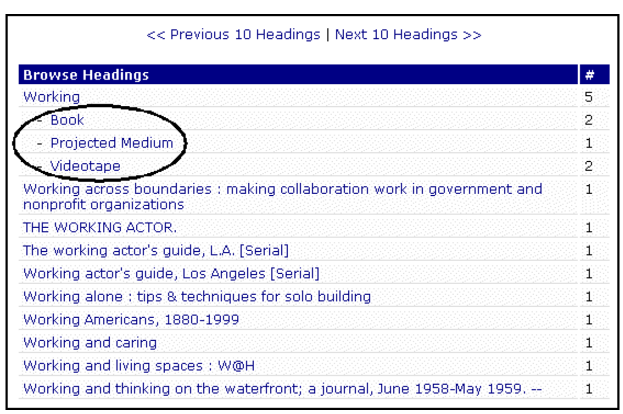
Also, if you find that the system suggests inappropriate terms for terms that the patron intended, you can enter a correctly spelled term in the **Phrase** box and the identical term in the **Override Phrase** box. In this case, when the patron enters the term correctly, no Did You Mean suggestion will be displayed. The new System Administration permission, **Modify did you mean overrides table: Allow** controls the ability to modify this table.

Improvements to Browse Searching

Polaris PowerPAC

Title and call number browse searches are now standard browse searches. When you browse the catalog by title or call number (item-level **Call Number** or bib-level **LC** and **Dewey** options), the returned list of headings is similar to the index headings returned when you browse by author, subject, or series. You select a title or call number heading term to see the titles associated with the heading, similar to the other types of browse searches. For any browse search, you can select the number of headings to list on a page. Click **Search Options** to access this option.

For browse title searches, the title heading count includes titles where the indexed title occurs anywhere in the record (not just the 245 and 130 tags), and displays the type of material if the type is not Book. If a title heading is associated with more than one bibliographic record, and the bibliographic records are not the same type of material, each type of material is listed separately under the title heading.



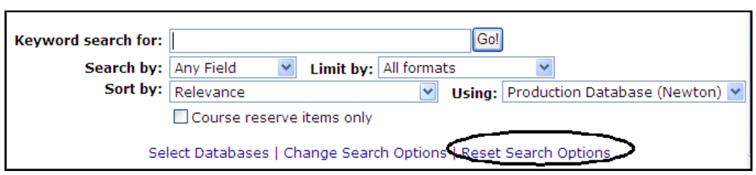
If your library offers **Call Number** as a browse search option, the item call numbers that are returned depend on the branch to which you are connected. To change the branch, you switch your connection to a different branch. The list of branches no longer appears on the Search Options page.

Note:
As in previous versions of Polaris, call number options for browse searches are controlled by the PAC profile **Local call number indexed field: Limit choice**. If the profile is set to **Yes** at the system level, and a Polaris PowerPAC user is connected to the system organization, all call number options for browse searching are suppressed. If the profile is set to **No** at the system level, and a Polaris PowerPAC user is connected to the system organization, the user can choose to browse the Dewey or LC bibliographic-level call number indexes. (The item-level call number index is not available for the system organization.) If the profile is set to **Yes** at the branch level, and a Polaris PowerPAC user is connected to the that branch, the user can browse the local item-level call number index only. If the profile is set to **No** at the branch level, and a Polaris PowerPAC user is connected to that branch, the user can choose to browse the Dewey or LC bibliographic-level call number indexes as well as the local item-level index.

Resetting Search Options

Polaris PowerPAC

The **Reset Search Options** link has been moved from the Search Options page to the search bar, so that it is no longer necessary to open the Search Options page to return these settings to their defaults. When you do a search with search options set, then click **Reset Search Options**, the search is done again using the default settings.



Wildcard Characters in PAC Search Terms

Polaris PowerPAC
Polaris PowerPAC Children's Edition
Polaris ActivePAC

The pound sign (#) no longer matches any single character in PAC search text. Instead, use a question mark (?). For example, **wom?n** finds *woman* and *women*. As in previous versions of Polaris, the asterisk (*) matches zero or more characters.

If you want to include the question mark or asterisk as a literal character in your search text, precede the character with a backslash \. This works with Polaris database searches only; it is not supported in remote database (Z39.50 target) searches.

Example:
quo vadis\?

OCLC and UPC Search Access Points in PAC

Polaris PowerPAC
Polaris ActivePAC

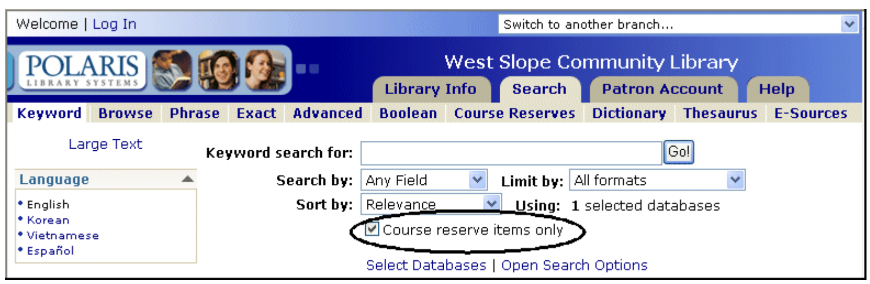
You can do a Boolean search for OCLC and UPC numbers in PAC.

Examples:
OCLC=100007346
UPC=000000056043

Searching for Course Reserve Items

Polaris PowerPAC

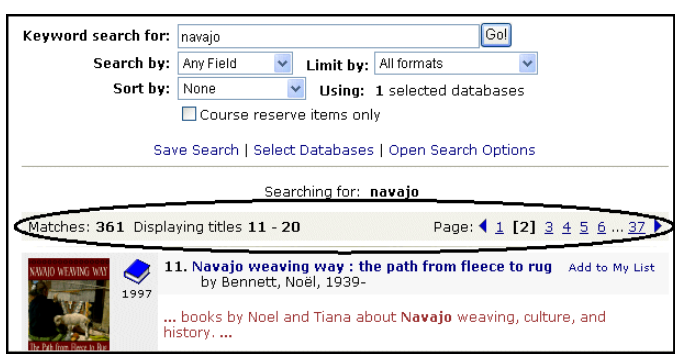
To simplify searching for course reserve items, the option to limit a search to course reserve items has been removed from the Search Options page. The **Course reserve items only** check box remains on the Keyword, Phrase/ Exact, and Boolean search bars, and has been added to the Advanced search bar. When this box is checked, titles in the search results have at least one attached item that is on reserve for a course. To remove the limit from the search, you simply clear the check box.



Search Results Navigation Improved

Polaris PowerPAC

You can jump to any page directly by clicking a page number, as well as by clicking the back and forward arrows. The total number of results and the current position in the results list are displayed near the page navigation links. Each title is numbered in the results list.

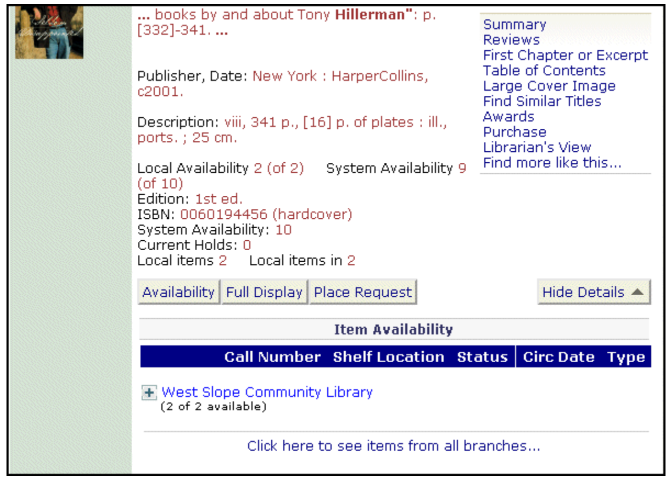


Search Results Display Redesigned

Polaris PowerPAC

The brief title information in search results has been compressed to give a quicker overview of the results. You can choose the data elements to display in this area. See "Customizing Search Results Data" on page 133. The format icon has been resized and moved next to the book jacket image, if any, and both are displayed on a contrasting color background. The publication date, if known, is displayed under the format icon. (The date is not displayed for serials, periodicals, or newspapers, where the publication date may not be a single year.) Options appear as buttons rather than plain text links.

You can click the title, the format icon, or the **Availability** or **Full Display** button to expand the brief title information for a specific title, without jumping back and forth between pages or losing your place in the search results. You can also choose the data elements to display in this expanded area. See "Customizing Search Results Data" on page 133. You can click **Hide Details** to compress the title information again. When you click **Availability**, summary holdings counts are displayed at the branch level. The Local and System availability tabs have been eliminated. Instead, if you have set the PAC profile **Item availability: Display local and system levels** to **Yes**, the local holdings are displayed along with a link to the system holdings.



The separate full title page has been eliminated. You click **Full Display** to see bibliographic information for the title. Like the brief view, you can choose the data elements that appear here. See "Customizing Search Results Data" on page 133.

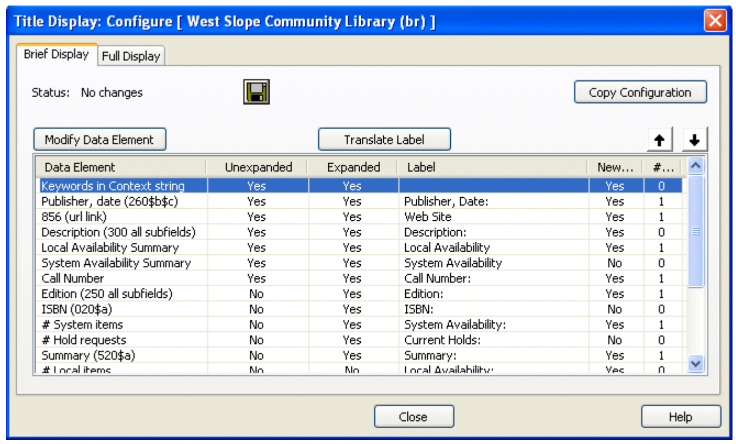
Note:
The **Availability** button, holdings counts, and availability view are not displayed for a title in search results from a remote database. When the title information is first expanded, the full title display appears.

Customizing Search Results Data

Polaris PowerPAC

Using the new PowerPAC profile in Polaris Administration, **Title Display: Configure**, you determine the specific information that should be included in the unexpanded and expanded brief title view, and in the full display for a title. You can specify the labels that identify the information elements, the order in which they appear, and line spacing. If you have Polaris PowerPAC Multi-Lingual Version, you can translate the labels and insert diacritic characters, using the same profile. The profile is available at the system, library, and branch levels. At installation, all organizations inherit their search results display settings from the system-level settings. When you change the brief or full settings at the system level, the corresponding library and branch settings also change. However, when you change the brief or full settings at the library or branch level, that organization no longer inherits changes made at the system level. In addition, you can copy the brief or full settings of any organization to any other organization; the settings that display in Polaris PowerPAC depend on the organization to which the user is currently connected. For details, see "Customizing Search Results Data" (Public Access Administration topics) in staff client online Help. Two new permissions, **Modify PAC brief title display** and **Modify PAC full title display**, control the ability to make these settings.

Tip:
Among many other options, you can choose to display the target audience (521$a) in the brief title view. If you enable this option, patrons can immediately see the Motion Picture Association of America (MPAA) rating for a DVD.



Two PowerPAC profiles, **Display number of items available** and **Display keyword in context under title**, have been removed because these options are included in the **Title Display: Configure** settings. The PAC profile **Display call number field in brief/full view** has been removed for the same reason.

Note:
These settings also affect the information included in the Brief and Full Title Display tabbed pages in Polaris ActivePAC search results and the Bibliographic Record workform - PAC preview.

Compressed Serials Holdings Display in Search Results

Polaris PowerPAC

The serials holdings display has been improved in Polaris PowerPAC search results. At the title level, a holdings statement summarizes all branch-level holdings marked **Display in PAC**. The statement begins with the earliest issue retained and ends with the latest, but it does not reflect gaps in the holdings. You can choose whether to display the holdings statement. See "Customizing Search Results Data" on page 133.

In the item availability view, you see a summary holdings statement at the branch level. At this level, you may see the retention designator from the serial holdings record, the summary holdings statement, and a public note from the serial holdings record for the branch. The illustration shows the item availability view for the title. In this example, each branch has a retention designator and a holdings statement. Only those issues that fall within the retention period are displayed, regardless of the number of issues checked in to the staff client.

When you expand a branch, you see the actual issues or items.

Using a new PowerPAC profile, **Item availability: Expand serial titles**, you can set the default item availability display to expanded or closed for serial items (those with a holdings statement for the branch) separately from the default setting for non-serial items. If you have extensive serial holdings, consider setting this profile to **No** (the default setting) to reduce scrolling in the PAC. Patrons can expand the lists they want to see at any time.

Holdings statements are generated by a nightly SQL job, **Build Up Compressed Holdings**, and you can also run the job manually. If you change the relevant records in the staff client, your changes will not be evident in the PAC until after the job is run. For information about settings in serial holdings records that control the display of serials in PAC search results, see "Serials Holdings Display in the PAC" on page 58.

Accurate Holdings Counts

Summary holdings counts give users immediate information about how many items are available out of the total number of items for a title in their search results. The method for calculating summary holdings counts (availability) has been improved so that these counts match the summary holdings counts at the branch level in the Availability view. This development takes into account serials issues that people may want to consult in the library, even if the issues do not circulate and there are no item records linked to the issues.

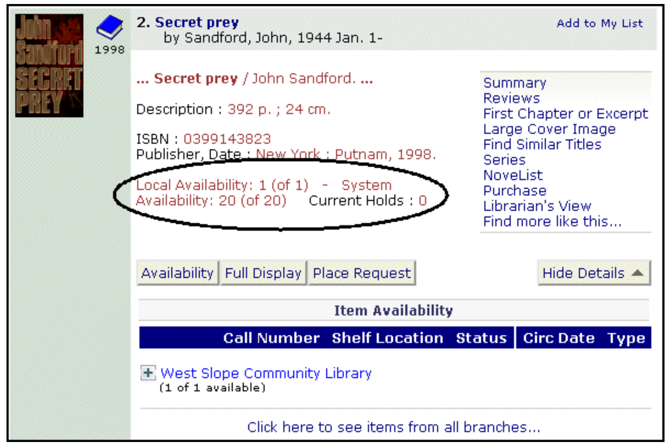
An item record is *not* included in the counts if **Display in PAC** is not checked in the item record or if the item record status is not final—that is, the status is provisional or deleted.

For holdings count purposes, an item is considered a serial if all the following conditions are true:

- There is an issue record (which may or may not have item records linked to it)
- The issue is programmatically linked to a publication pattern, which is linked to a holdings record
- The order type is Subscription
- Issues are retained

These serials are included in the counts if **Display in PAC** is checked in the serial holdings record. Items that do not meet this definition of a serial are considered monographs for holdings count purposes.

Two sets of holdings counts—system and local—are available, where local refers to branches defined as local by the connection branch. You can set either or both summary holdings counts to appear in the brief title information or only in the expanded title information. See "Customizing Search Results Data" on page 133. The illustration shows both counts in the expanded information for a title.



Suppressing Items by Circulation Status

Polaris PowerPAC

Using the new PowerPAC profile **Suppress item display**, you can specify item circulation statuses that should prevent an item from being displayed in Polaris PowerPAC search results. When a circulation status is selected, items with this status are not displayed in PAC. You can set this profile at the system, library, or branch level. For any particular item, the system uses the setting for the item's assigned branch to determine whether the item should be included in the search results display. Your changes will not be evident in the PAC until the SQL job **PAC Availability** adjusts the counts. This job ordinarily runs automatically during overnight processing.

Search Results Ranked by Relevance

Polaris PowerPAC

Relevancy ranking is the programmatic ordering of search results so that those that seem most likely to meet the users' needs appear first in the list. For Polaris PowerPAC, program calculations take into account the frequency of search terms in a given field and the relative importance of the field. If you specify **Relevance** as a sort order for Polaris PowerPAC search results, the additional criterion of proximity in the field is applied. Relevance is the default sort order for Polaris PowerPAC search results, but in Polaris 3.3, you can set a default sort order by search type. See "Availability Search Filter" on page 126.

Results Set Size

Polaris PowerPAC
Polaris PowerPAC Children's Edition
Polaris ActivePAC

The maximum number of records returned for a search has been increased from 1,000 to 100,000. This change accommodates more useful relevancy ranking (see "Search Results Ranked by Relevance" on page 137). However, you may experience decreased performance for searches with large results sets if your server capacity is limited. To improve performance, you can adjust the maximum number of records to return. The new profile **Result set: Maximum number of records to return** controls this limit. The profile is available at the system, library, and branch levels, on the PowerPAC, Children's PAC, and PAC Active client tabbed pages. You set it separately for each PAC.

Note:
If you lower the maximum number of records to return, relevancy ranking may be less effective.

Related Searches Web Parts in Dashboard

Polaris PowerPAC

When a patron's search results are returned, the Polaris PowerPAC dashboard can display two Web parts to launch searches related to the results. The **Narrow Search** Web part offers links to filter the current search results; the **Related** Web part offers links to launch other, related searches.

Note:
These Web parts are not displayed for course reserve searches.

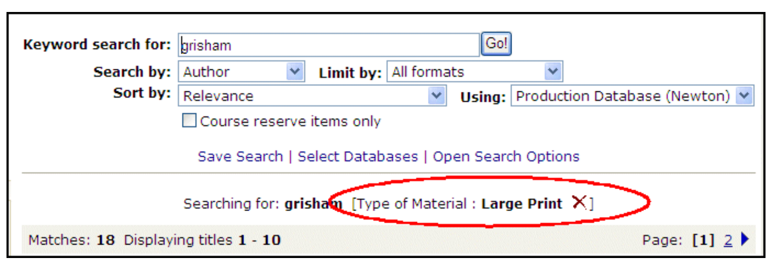
Using the PowerPAC profile **Dashboards: Narrow your search & Related searches**, you can offer the **Narrow Search** Web part, the **Related** Web part, or both; specify the elements available for each Web part and set the display order; set the initial display to expanded or collapsed; set the minimum and maximum number of links for each element; specify your own labels for the Web parts and elements and translate the labels. By default, both Web parts and all their available elements are enabled.

Narrow Search - This feature offers faceted searching. When the patron selects an element in this Web part, a search is launched within the current results set. (Within each element, the specific searches are based on the top 500 relevant titles of the original search. For example, if 1000 hits are returned only the first 500, based on relevancy, are used to determine the narrower filters. But once one of those narrower filters is selected, all 1000 hits are checked for matches.) For each element, the available links depend on the specific data in the search results. For example, if the search results set includes titles with the Large Print type of material, the Large Print filter link is available under the Type of Material element.

The following elements are available for narrowing search results:

- **Type of Material**
- **Subjects**
- **Authors**
- **Series**
- **Publication Date**
- **Most Popular**
- **Target Audience**
- **Language**

From the new results, the patron can select another element to limit the new result set. Each filter selection is displayed in a string above the search results. The patron can click the delete icon to remove a filter and display the new results.



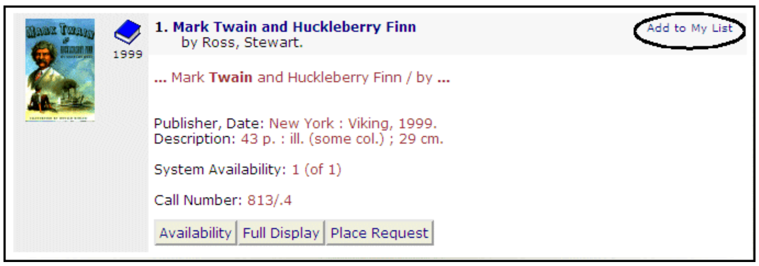
Related - When the patron selects an element in this Web part, a new search is launched using the same search term. Depending on the element, the new search may be a browse search for a heading in a specified index (**Subject**, **Author**, or **Series**), a keyword search in a specified field (**Other searches**), or a keyword search in a different (Z39.50) database (**Other databases**). The **Other databases** element lists the databases you specified for the **Using** box in the top area of the search page. This Web part includes the **Related Subjects**, **Other Searches**, and **Other Databases** Web parts that appeared separately on the dashboard with the search results page in earlier versions of Polaris PowerPAC. For setup details, see "Setting Related Search Options" (Public Access Administration topics) in staff client online Help.

Title Lists Improved

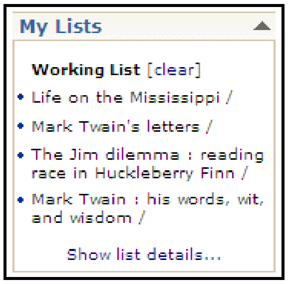
Polaris PowerPAC

The user interface, workflow, and available features for saving and working with title lists have been re-designed and improved. As in previous versions of Polaris, you can select titles from your current search results to form a working title list. You can print the working title list, send it by e-mail, or save it to a disk in several formats. The working title list is available for the current working session only. In Polaris 3.3, if you are a registered library patron, you can also create and save multiple title lists in association with your patron account. Whenever you log in, you can see and work with your saved lists. You can move or copy titles from a working list to a saved list or from one saved list to another, and print, send, or save to disk any list you have saved in your patron account.

The method for adding titles to a working title list has changed. In the search results display, you click **Add to My List** for the title you want to add.

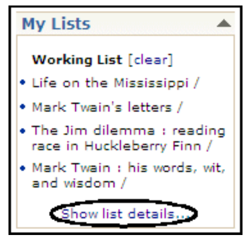


The title is added to **My Lists** in the dashboard area at the side of the page.

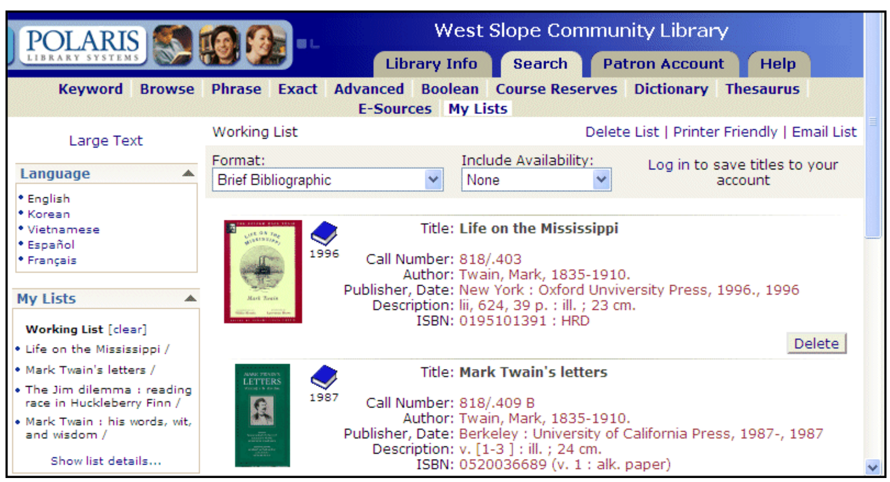


In the search results display, the **Add to My List** link changes to **Remove.** (You can click **Remove** to take the title off the working title list.)

To view information about the titles and work with the title list, click **Show list details** below the Working List in the dashboard.



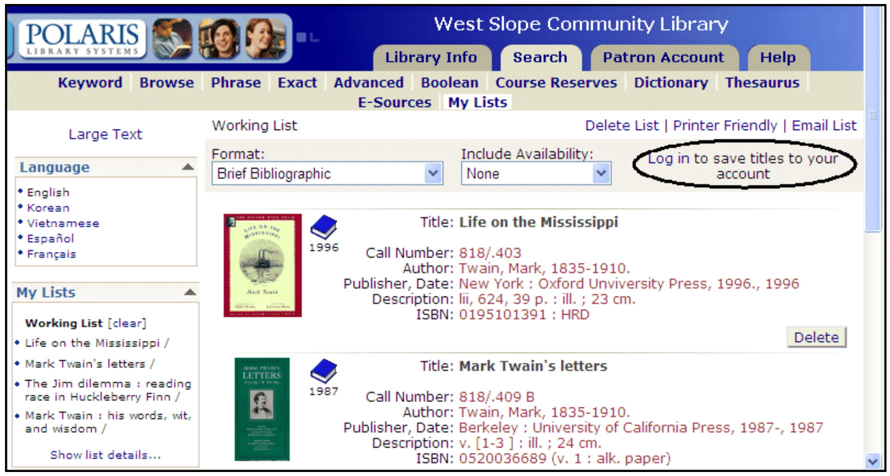
The new My Lists view is displayed in the center of the page. You see more information about titles in the working title list, in your choice of formats.



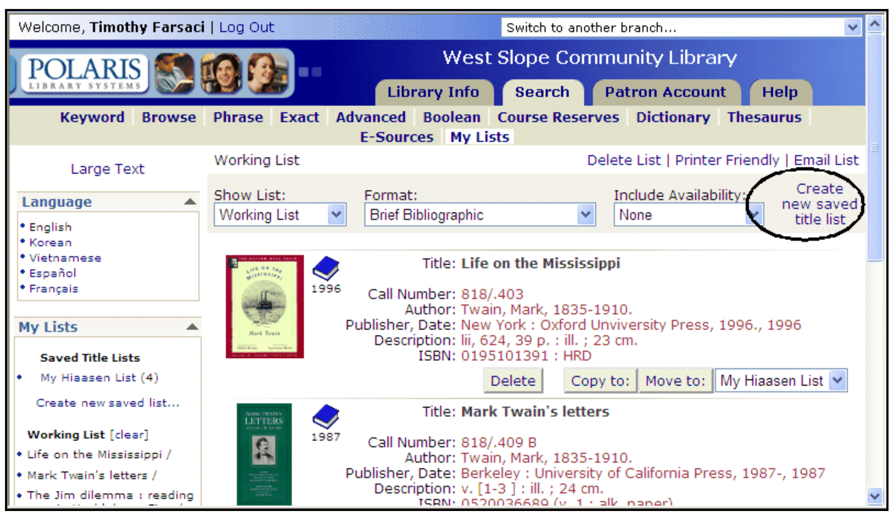
To change the display format, select a format in the **Format** list. If you select **Brief Bibliographic** or **Full Bibliographic**, you can choose to include availability information for each title. Select **Local Availability** or **System Availability** from the **Include Availability** list.

To delete all the titles, click **Delete List** at the top of the My Lists view, or click **clear** by the Working List in the dashboard. The working title list is cleared, and no longer displays in the My Lists view or the dashboard. To delete one or multiple titles from the working title list, click **Delete** by the titles in the My Lists view. The titles are removed from the title list.

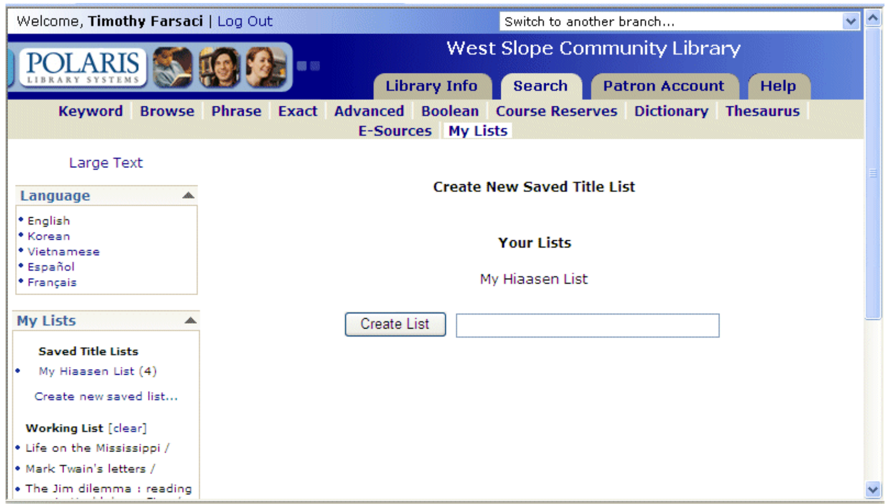
To create a saved title list from the working title list, you click **Log in to save titles to your account** at the top of the My Lists view.



After logging in, your name and the **Log Out** link are displayed at the top of the page when you are logged in. The working list is again displayed in the My Lists view, and you can click **Create new saved list** at the top of the My Lists view.



The new list form appears, where you name the list.

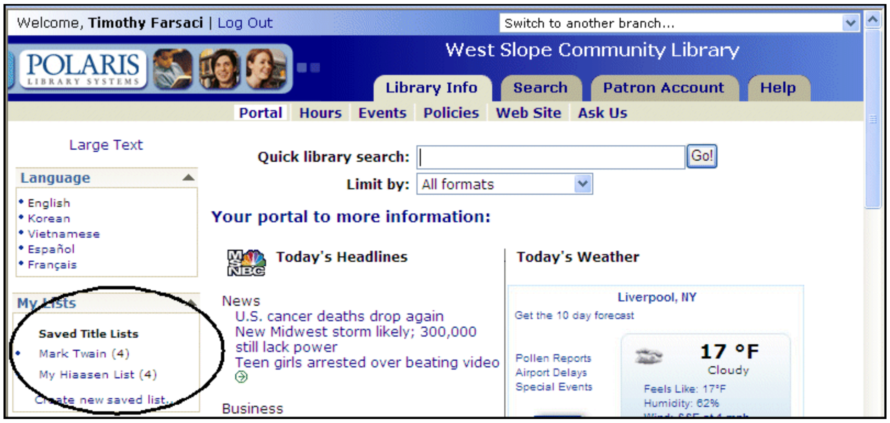


Note:
If you have already saved title lists to your patron account, these are displayed on the form and in My Lists dashboard at the side of the page, under **Saved Title Lists**. You can also click **Create new saved list** in the dashboard to create a new list.

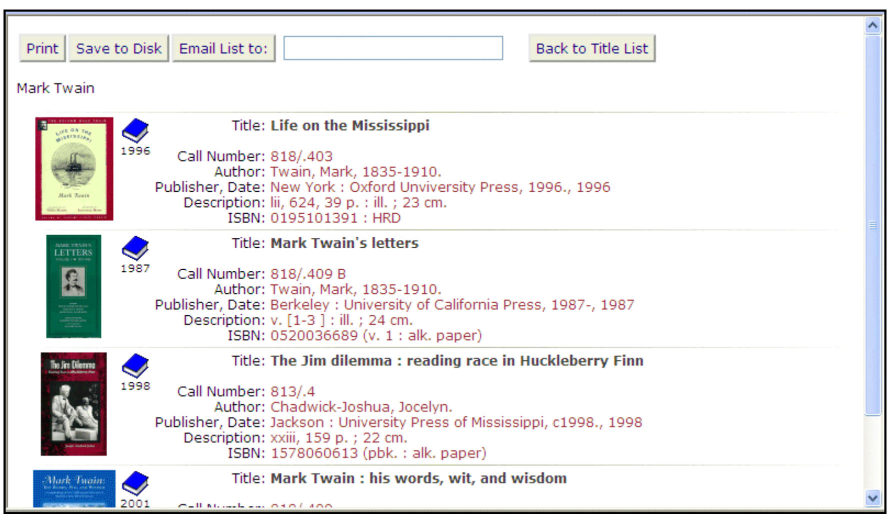
You can add titles to the new saved list using one of the following methods:

- To copy a title from the working list to the saved list, select the saved list in the box with the title information, then click **Copy To**. The title remains on the working list, but it is also added to the saved list.
- To move a title from the working list to the saved list, select the saved list in the box with the title information, then click **Move To**. The title is removed from the working list and added to the saved list.

You can delete saved lists and copy and move titles from one list to another using the same methods. To display and work with saved lists, log in to your patron account. The saved lists are displayed in the dashboard, and you can click a saved list to display it in the My Lists view.



From the My Lists view, you can save a title list to disk, print it, or send it by e-mail. Select a format, then click **Printer Friendly** at the top of the My Lists view. The title list is again displayed in the format you selected, but in the printer-friendly view. Extra page information has been removed. You can click **Save** and select a location, click **Print** and select a printer, or specify an e-mail address and click **Email List to**.



Call Numbers in Search Results

Polaris PowerPAC

Among other data elements, you can choose to display a call number in the brief view of Polaris PowerPAC search results (see "Customizing Search Results Data" on page 133). If the user is connected to a branch, the item call number from the first item with a status of In at that location is displayed; if none are in, the call number of the last item that was In is displayed. If there are no local items, no call number is displayed. If the user is connected to the system and this data element is set to be displayed, the bibliographic call number is used. In the full display for a title, you can choose to display the bibliographic call number regardless of the connection organization.

Uniform Title in Search Results

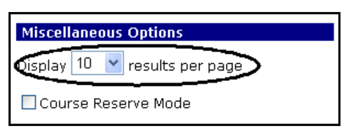
Polaris PowerPAC
Polaris PowerPAC Children’s Edition
Polaris ActivePAC

In PAC search results, a record’s primary title is ordinarily taken from the MARC 245 tag. In previous versions of Polaris, the primary title was *only* taken from the 245 tag. In Polaris 3.3, if a record has only a uniform title (130 tag), and no 245 tag entry, the uniform title is used as the primary title. If a record has entries in both the 245 and 130 tags, the entry in the 245 tag is used for the primary title, and you can choose to include the uniform title in the full display for the record. See “Customizing Search Results Data” on page 133. However, for browse title searches, the title heading count includes titles where the indexed title occurs anywhere in the record (not just the 245 and 130 tags).

Number of Titles Per Search Results Page

Polaris PowerPAC

Patrons can set the maximum number of titles that appear on each search results page by selecting the number on the Search Options page. The maximum number is 100.



Genre Search Link

If you choose to display the genre field (655 tags) in the Polaris PowerPAC full display for a title, patrons can click the link to launch a browse subject search. In previous versions of Polaris, all 6xx tags *except* 655 were subject search links; these remain subject search links in Polaris 3.3.

Items Out in Patron Account Page Header

Polaris PowerPAC
Polaris ActivePAC

The Patron Account page header displays a summary count of the patron's current number of checked-out items. The count does not include lost or claimed items.

Saved Searches (Search Agent) and Book Jackets

Polaris PowerPAC
Polaris ActivePAC

When you set the PAC profile **Search agent enable** to **Yes**, patrons can save searches to run automatically at designated intervals. In previous versions of Polaris, when a saved search was run, book jackets would be displayed in the results based on the **Enriched Data** settings for the system. In Polaris 3.3, book jackets are displayed in the results based on the **Enriched Data** settings for the patron's registered branch.

Credit Card Payments for Fines and Donations (PAC)

Polaris PowerPAC
Polaris ActivePAC

You can accept credit card payments from the PAC for fines and donations to the library. Polaris 3.3 and Polaris 3.2 (build 540 or later) support the VeriSign® Payflow Pro service for payment processing. To accept credit card payments, your library establishes an account with VeriSign directly, or with an e-commerce provider such as a bank that offers VeriSign Payflow Pro payment processing. See "Credit Card Payments - Staff Client, PAC, and Polaris ExpressCheck" on page 105. If you plan to accept credit card payments from PAC, Secure Socket Layer (SSL) must be installed and active for your system. See "Secure Socket Layer (SSL)" (Polaris Administration topics) in staff client online Help.

Polaris also supports PAC credit card payments through Class Point of Sale. See "Active Payment Manager (Class Point of Sale) and Polaris" on page 108.

Setting Default Expiration and Address Check Dates

Polaris PowerPAC
Polaris ActivePAC

As in previous versions of Polaris, you use the PAC profile **Patron access options** (Defaults tabbed page) to set default expiration and address check dates for patron self-registration. These controls now work like the staff client patron registration defaults: you can set an exact date, as well as setting a period of months or years.

Spaces in Patron Passwords

Polaris PowerPAC
Polaris ActivePAC

Spaces are not allowed in new patron passwords. However, an existing password that includes a space will continue to work.

E-Source Transactions

For custom reports, you can choose to log the transaction when a patron accesses an e-source target:

❑ **Transaction** - E-Source Access

❑ **Transaction code** - 2201

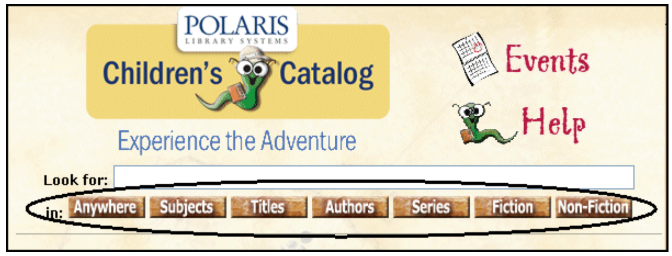
❑ **Transaction subtypes**
- 239 - Remote User flag
- 240 - Selected Language ID
- 241 - Name of e-source selected to view
- 7 - Patron Code (if patron logged on)
- 123 - Patron Assigned Branch (if patron logged on)
- 33 - Patron Statistical Code (if patron logged on)

For information about logging transactions, see “Collecting Transaction Statistics” in staff client online Help (Polaris Administration topics).

Displaying Search Choices (Children's PAC)

Polaris PowerPAC Children's Edition

You can control the display of each search choice in Polaris PowerPAC Children's Edition.



The following new Polaris Administration Children's PAC profiles, available at the system, library, or branch level, control the display of each button. By default, each is set to **Yes** (button is displayed):

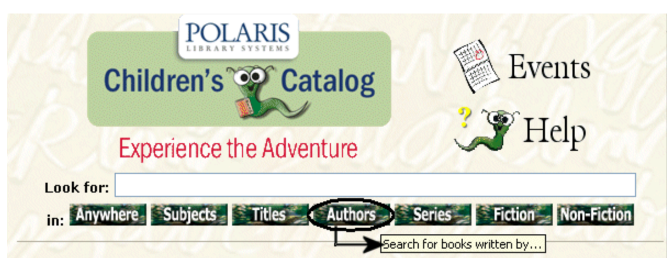
- **Search button visibility: Anywhere button**
- **Search button visibility: Authors button**
- **Search button visibility: Fiction button**
- **Search button visibility: Non-Fiction button**
- **Search button visibility: Series button**
- **Search button visibility: Subject button**
- **Search button visibility: Title button**

If all seven profiles are set to **No**, the **Look for** text field remains displayed although no buttons appear. However, you can type text in the field and press **ENTER**. A keyword search in all fields ("anywhere") is launched. This function is the same regardless of what buttons are displayed.

Tooltip Text Improved (Children's PAC)

Polaris PowerPAC Children's Edition

The tooltip text that appears when you position the cursor over search choices in Polaris PowerPAC Children's Edition has been rewritten to better describe the selection.



Shelf Location in Polaris PowerPAC Children's Edition

Polaris PowerPAC Children's Edition

You can display an item's shelf location in the item availability view for a title in Polaris PowerPAC Children's Edition. A new Children's PAC profile, **Item availability: Display shelf location**, controls this display; it is set to

Yes by default. In connection with this change, the existing Children's PAC profile **Item availability: Display location** was renamed to **Item availability: Display branch location** to clarify its purpose.

PAC Link in Polaris PowerPAC Children's Edition

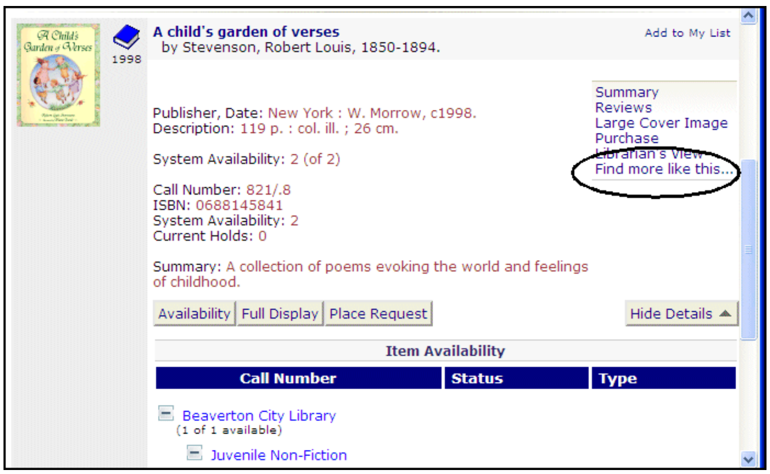
Polaris PowerPAC Children's Edition

On the Polaris PowerPAC Children's Edition home page, when you click the **Go to Polaris Catalog** link at the bottom of the page, you go to the Polaris PowerPAC home page. If you click the same link on a Polaris PowerPAC Children's Edition search results page, the search is launched in Polaris PowerPAC without the Children's Edition filters.

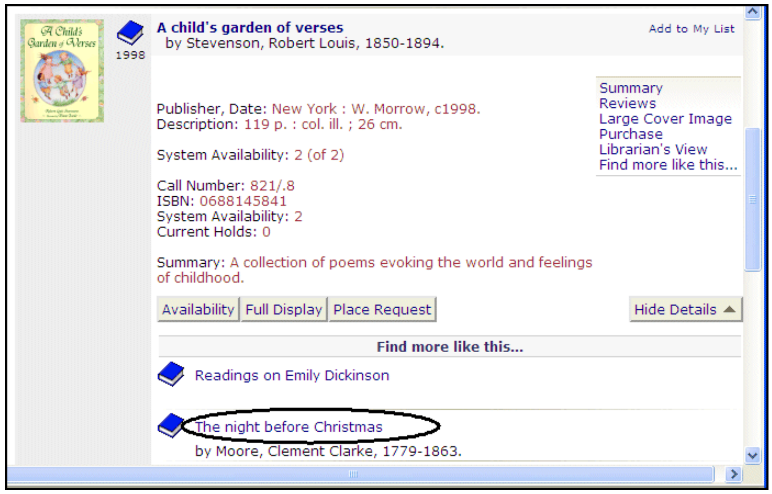
Find More Like This (NoveList Similar Titles)

Polaris PowerPAC

If your contract with NoveList includes the Similar Titles feature, and you have enabled NoveList in Polaris Administration, patrons see a **Find more like this** link for titles in their search results.



When the patron clicks the **Find more like this** link, a search is launched for similar titles at the NoveList site. The system determines which of these exist in your PAC catalog, and these are displayed as links in the PAC. The patron can click a link to find the suggested title.



QuestionPoint[SM] Virtual Reference Service

Polaris PowerPAC

The 24/7 Reference service from OCLC Online Computer Library Center, Inc. has changed to QuestionPoint virtual reference services. If you formerly used 24/7 Reference, you must change your settings in Polaris Administration to enable QuestionPoint virtual reference services. The change affects Polaris 3.3 and Polaris 3.2 build 565 or later.

To set up QuestionPoint reference services, set the following PowerPAC profiles for the system, library, or branch:

- ❑ **Virtual reference: Enable** - Select **Yes**. This setting displays the virtual reference link on Polaris PowerPAC pages, and allows access to the virtual reference session history from the patron account.
- ❑ **Virtual reference: Supplier** - Select **QuestionPoint**.
- ❑ **Virtual reference: Configure** - Click the **QuestionPoint** tab, then set the following profiles:

Note:
You need specific setting information from OCLC to do the next steps.

- **Library ID, Partner ID, Category** - Obtain these site-specific values from OCLC.
- **Main URL** - URL that connects to the QuestionPoint virtual reference librarian
- **Transcript URL** - URL that retrieves virtual reference history for a patron
- **View Port** - Your Polaris PowerPAC home page URL
- **Log in required** - If you want to restrict access to registered patrons, select (check) this option. If this option is not checked, a **Guest** button is displayed on the virtual reference log-in page. The user can click **Guest** to go straight to the QuestionPoint Web site and submit a question.
- **No Login URL** - If you do not require log-in, type the QuestionPoint URL to which the **Guest** link should connect.

Virtual reference features have not changed. For details, see "Setting Up Live Virtual Reference Services" (Public Access Administration topics) in staff client online Help. OCLC QuestionPoint documentation for librarians and administrators is available at
http://www.questionpoint.org/support/documentation/gettingstarted/index.html

Polaris Bookstore

Through Polaris Bookstore and Baker & Taylor Inc., your library can establish an online bookstore where patrons can purchase materials at a discount comparable to other major online retailers, and your library receives a portion of the sales as a donation. The Bookstore is customized for your library, with your own graphics, URL prefix, and custom packing slip text. Polaris Bookstore is available in Polaris 3.3 and Polaris 3.2 build 567 or later by specific contract with Polaris Library Systems.

When a title in a patron's search results is available in the Bookstore, the patron can click a **Buy It Now** link to purchase the title. (If the title is not available at the Bookstore, no **Buy It Now** link is displayed.) You can also place a "shop now" button on your library's Web site, or promote the bookstore with a link in the custom content area of the portal page. Patrons can search or browse the store and order any available title, placing their purchases in an online shopping cart and paying by credit card.

Baker & Taylor maintains the bookstore site and handles any returns. You receive your portion of the proceeds at regular intervals from Polaris Library Systems, as determined by your Polaris Bookstore contract.

You work with your Polaris Site Manager to set up your bookstore profile. When the bookstore is implemented, ongoing support is provided by Polaris Library Systems.

For more information about Polaris Bookstore, contact your Polaris Site Manager. For information about setting up Polaris Bookstore in Polaris Administration, see "Setting Up Polaris Bookstore" (Public Access Administration topics) in staff client online Help.

As in previous versions of Polaris, you can also set up **Purchase** links for titles in ActivePAC and Polaris PowerPAC search results. When a patron clicks the link, a search for the title is launched at a specified online bookstore site. In Polaris Administration, use the new PAC profile **Purchase options** to set up the generic **Purchase** link, Polaris Bookstore, or both. (This profile replaces the previous PAC profiles **Purchase: Enable**, **Purchase: URL prefix**, and **Purchase: URL suffix**.) If you have a Polaris Bookstore contract and you enable both options, the **Buy It Now** link is displayed when the title is available at the Bookstore, and the **Purchase** link is displayed when the title is unavailable at the Bookstore and the title has an ISBN.

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