What's New in Polaris 5.0 SP1 and Leap 1.0 SP1

innovative

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Contents

New and Modified Polaris Administration Settings

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

Location / Name	Purpose	Default	Level	More Info
Modified Request Parameters				
Hold options | Pickup tab (modified)	Select check boxes to specify the hold statuses for which patrons can change the pickup location.	None selected.	System	Added status check boxes to the Pickup tab of the Hold options dialog box. See "Enable Patrons to Change Their Hold Pickup Location" on page 5.
Hold options | Terms tab (modified)	Specify the number of days held for pickup and the default expiration period.		System, Library, Branch	Added fields to specify the number of days for pickup and the default expiration date on the Terms tab.
Hold options | Queue tab (modified)	Specify holds trapping by preference group.		System, Library, Branch	Added check boxes to specify holds trapping preference within a preference group: by location or patron. See "Three Levels of Holds Fulfillment " on page 42.
New Circulation Permissions				
Patron record: Secure	Users with this permission can secure patron records, preventing library activity.			See"Secure a Patron Record from the Pat-ron Status Work-form" on page 30.
Patron record: Release	Users with this permission can release secured patron records so that library activity can resume.			See "Release a Secured Patron Record" on page 36.

Location / Name	Purpose	Default	Level	More Info
Picklist application: Modify circulation status	Users with this permission can modify the circulation status from the Leap Picklist.	Not granted.		See "Picklist Changes" on page 95.
New Leap Permissions				
Access Leap: Allow	Users with this permission can access Polaris Leap.	Not granted.		See "Leap Access Permissions and Permissions Checking" on page 61.
Access Leap remotely: Allow	Users with this permission can access Polaris Leap remotely.	Not granted.		
New and Modified PAC Profiles				
Patron access options (modified)	Specify the settings that patrons can see in their PAC accounts if they have associated patrons.		System, Library, Branch	Added options for displaying the settings for associated patrons in the patron account in PAC. See "Display Associated Patron Accounts in PAC" on page 37.
Item availability: Suppress for integrated econtent titles (new)	Prevent **Availability** displays in the PowerPAC and Mobile PAC for integrated eContent titles.		System, Library, Branch	New PAC profile to suppress Availability displays in PowerPAC and Mobile PAC. See "Suppress EContent Availability Display in PAC" on page 44.
New PowerPAC Profile				
Navigation: Claimed and Lost	If the profile is set to Yes for the patron's registered branch, any claimed or lost items the patron has are displayed in the Claimed and Lost view in the patron's account in Power-		System, Library, Branch	New PowerPAC profile to display or suppress claimed and lost items. See "Claimed and Lost Items Displayed in PowerPAC" on page 53.

Location / Name	Purpose	Default	Level	More Info
	PAC.			
New Mobile PAC Profile				
Navigation: Claimed and Lost	If the profile is set to Yes for the patron's registered branch, any claimed or lost items the patron has are displayed in the Claimed and Lost view in the patron's account in Mobile PAC.		System, Library, and Branch	New Mobile PAC profile to display or suppress claimed or lost items in the patron account. See "Claimed and Lost Items Displayed in Mobile PAC" on page 55.
Modified Self-Check Unit Parameters				
Check-Out: Item options	Prevent check outs from self-check units for items with a status of Missing part.			Added **Missing part** check box to the item circulation statuses. See "Prevent Check Outs from SIP Self-Check Units for Claim Missing Parts Items" on page 49.
Polaris ExpressCheck: Blocking Conditions	Prevent check outs from ExpressCheck units for items with a status of Missing part.			Added **Missing part** to the Item Blocks tab. See "Prevent Check Outs from Polaris ExpressCheck Units for Claim Missing Parts Items " on page 50.

Change Hold Pickup Location

In Polaris Administration, new hold request options can be set at the System level that allow patrons (regardless of their registered branch) to change the pickup location for hold requests with specific statuses: Active, Held, Inactive, Located, Pending, and Shipped. Your administrator can select all, some, or none of these hold statuses. If no hold statuses are selected, patrons will not be able to change the hold pickup location for any of their hold requests from PowerPAC or Mobile PAC.

If your library allows patrons to change the pickup location of hold requests with a status of Held, the new pickup location will be displayed only when the item has been pulled from the holds shelf and rerouted. Once the item is checked in at the new pickup location, the number of days held for pickup is restarted.

This development includes the following:

- Pickup options on the Hold options dialog box where the administrator can specify the hold statuses for which patrons can change the pickup location from the PowerPAC and Mobile PAC. See "Enable Patrons to Change Their Hold Pickup Location" on page 5.
- PowerPAC options for patrons to change their holds pickup location (if enabled in Polaris Administration). See "Change the Hold Pickup Location from PowerPAC " on page 6.
- Updates to the Request view in PowerPAC - See "Updates to PowerPAC Requests View" on page 8.
- Mobile PAC options for patrons to change their holds pickup location (if enabled in Polaris Administration). See "Change the Hold Pickup Location from Mobile PAC" on page 9.
- An additional holds status, Shipped, for which staff can change the pickup location.See "Change the Pickup Location for a Shipped Hold Request " on page 11.
- A new listview in the Request Manager to identify held items that must be rerouted to the new pickup location. See "Change the Hold Pickup Location for a Held Item from the Staff Client" on page 13.
- A transfer hold message that displays when an item that fills the hold request needs to be transferred to the new pickup location. See "Check-In/Check-Out and Trap the Item for the New Hold Location" on page 15.
- A new transaction subtype in the Request History and the transaction database. See "New Transaction When Hold Pickup Location is Changed" on page 17.
- A new Holds to Transfer report that lists held items for which the pickup location has been changed. See "Hold Requests to Transfer Report" on page 19.

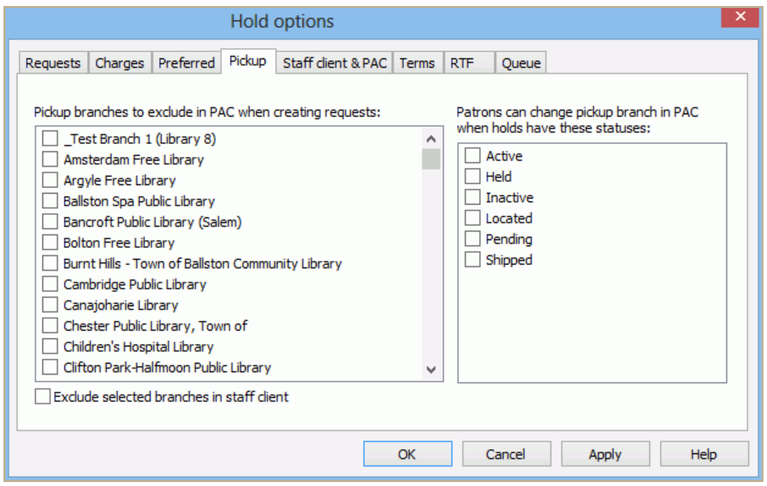
Enable Patrons to Change Their Hold Pickup Location

At the System level only, the Polaris Administrator can open the Holds options dialog box, select the Pickup tab and specify the hold statuses for which patrons can change the pickup location from the PAC (PowerPAC and Mobile PAC).

To select the hold statuses for which patrons can change the hold pickup location:

1. Select **Administration | Explorer | System | Parameters.**
2. Select the **Request** tab, and double-click **Holds options**.

   The Hold options dialog box opens.
3. Select the **Pickup** tab.



4. Select the check boxes to specify the hold statuses for which patrons can change the pickup branch from the PAC. If no status check boxes are selected, the option to change the pickup location does not display in the PowerPAC or Mobile PAC.
5. Click **Apply** to set the selected options, and click **OK** to close the dialog box.

   Patrons can change the pickup location for holds with the selected statuses.

   > **Note:**
   > When the hold location is changed, the number of days held restarts once the item has been checked into the new pickup location.

   See these topics:

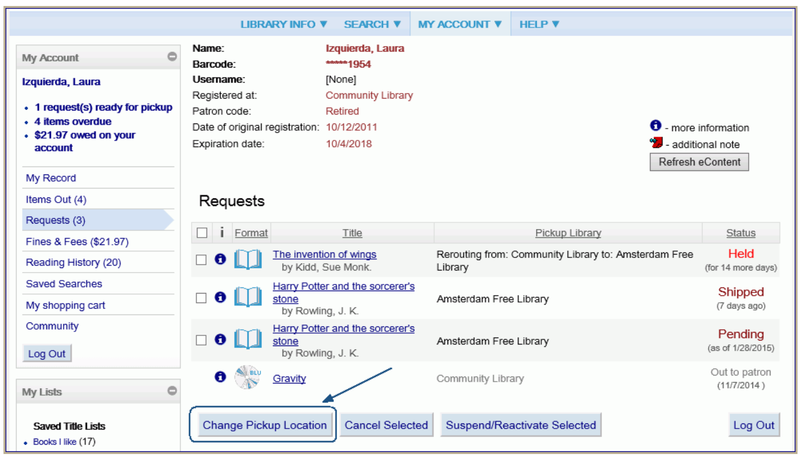
   - "Change the Hold Pickup Location from PowerPAC " on page 6.
   - "Change the Hold Pickup Location from Mobile PAC" on page 9.

Change the Hold Pickup Location from PowerPAC

When at least one hold status is selected in the **Hold options** parameter at the System level, patrons can select holds with any of these selected statuses in the Requests view of their PowerPAC account, and click the **Change Pickup Location** button. If no hold statuses are selected, the **Change Pickup Location** button does not appear.

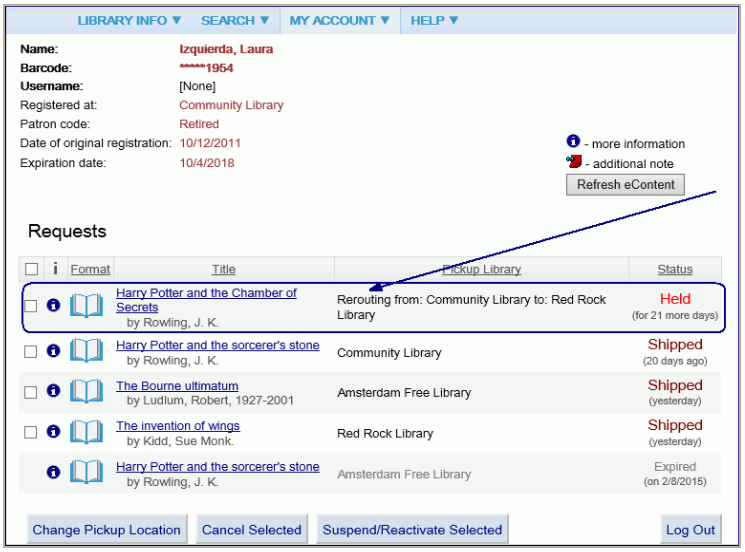
To change the pickup location from PowerPAC:

1. Log in to your patron account in the PowerPAC.
2. Select **Requests** to see the hold requests.



3. Select the check boxes next to the holds for which you want to change the pickup location, and click the **Change Pickup Location** button.

   After the pickup location has been changed for a hold request with a status other than Held, the new pickup location is displayed in the **Pickup Library** column. If the hold request has a status of **Held**, **Rerouting from *[original pickup location]* to *[changed pickup location]*** is displayed in the **Pickup Library** column.



Other changes were also made to the Requests view. See "Updates to PowerPAC Requests View" on page 8.

Updates to PowerPAC Requests View

The following changes were made to the Requests view of the patron's PowerPAC account.

- The **Cancel All** and **Suspend/Reactivate all** buttons were replaced with **Cancel Selected** and **Suspend/Reactivate selected** buttons.
- A new check box was added to the header in the left column.

When a patron opens the Requests view, check boxes are displayed next to the hold requests for which it is possible to change the pickup location, cancel, or suspend/reactivate the hold. If the patron clicks the check box at the top of the column, all the displayed check boxes are selected (checked).

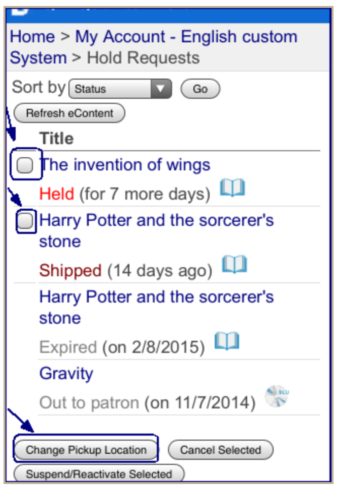
Change the Hold Pickup Location from Mobile PAC

When at least one hold status is selected in the **Hold options** parameter at the System level, patrons can select holds with any of these selected statuses in the Requests page of their Mobile PAC account, and click the **Change Pickup Location** button. If no hold statuses are selected, the **Change Pickup Location** button does not appear.

To change the hold pickup location from Mobile PAC:

1. Log into the patron account.
2. Select **Hold Requests**.

   The Requests page is displayed.



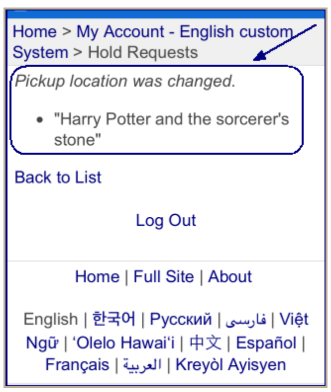
3. Select the check box next to the hold or holds, and select the **Change Pickup Location** button.

   Note:
   If any of the selected holds have a status for which changing the hold pickup location is not allowed, you cannot select the **Change Pickup Location** button.

   The next view displays the Pickup Library list box.

4. Select the new pickup library from the **Pickup Library** list and select **Yes**.

   A confirmation message is displayed.



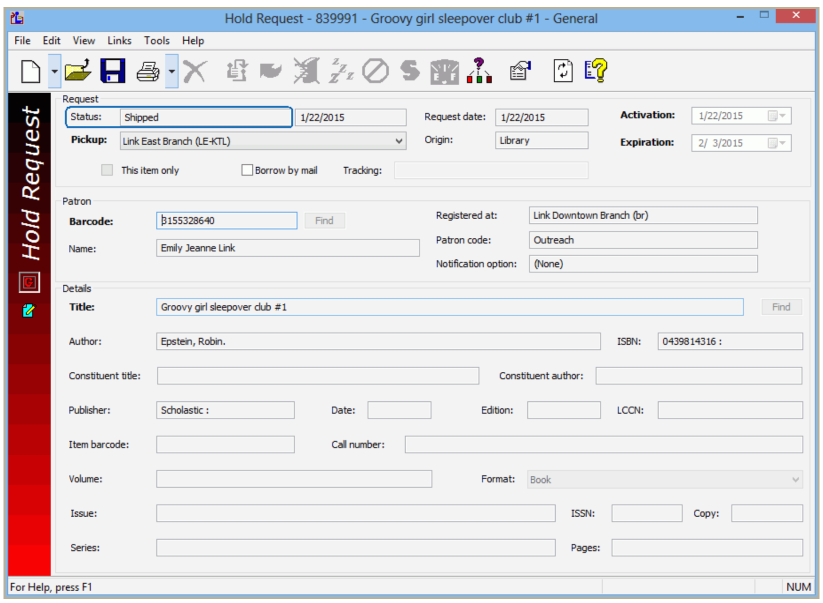
Change the Pickup Location for a Shipped Hold Request

As of Polaris version 5.0, staff members can change the pickup location of hold requests with any of these statuses: Active, Pending, Located, Inactive, and Held. With this new development, staff members can also change the pickup location for held items that have a status of Shipped.

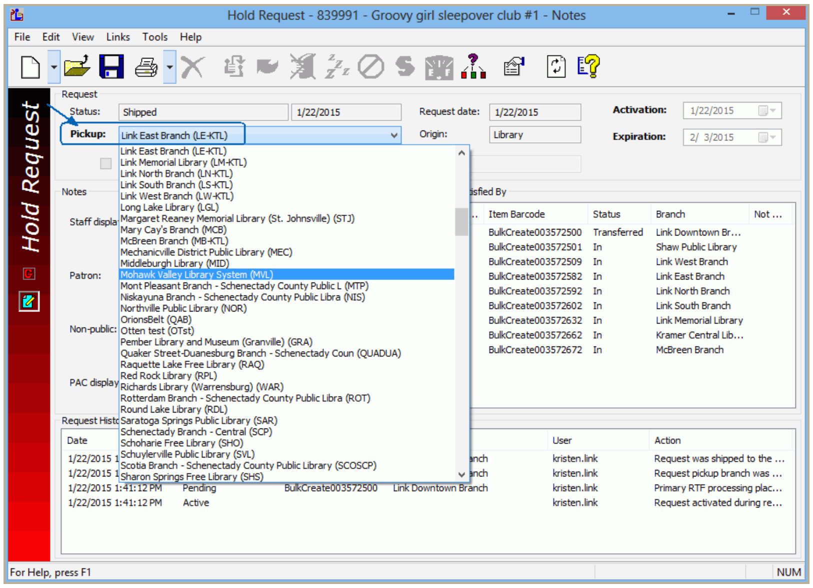
> **Note:**
> The permission **Modify hold request: Allow** is required to change the hold pickup location.

To change the hold pickup location:

1. Open the Hold Request workform for a shipped hold request.



2. Select a different pickup branch from the **Pickup** box.


Hold Request - 839991 - Groovy girl sleepover club #1 - Notes
File Edit View Links Tools Help
Hold Request
Request
Status: Shipped 1/22/2015
Request date: 1/22/2015
Activation: 1/22/2015
Pickup: Link East Branch (LE-KTL)
Origin: Library
Expiration: 2/ 3/2015
Link East Branch (LE-KTL)
Link Memorial Library (LM-KTL)
Link North Branch (LN-KTL)
Link South Branch (LS-KTL)
Link West Branch (LW-KTL)
Long Lake Library (LGL)
Margaret Reaney Memorial Library (St. Johnsville) (STJ)
Mary Cay's Branch (MCB)
McBreen Branch (MB-KTL)
Mechanicville District Public Library (MEC)
Middleburgh Library (MID)
Mohawk Valley Library System (MVL)
Mont Pleasant Branch - Schenectady County Public L (MTP)
Niskayuna Branch - Schenectady County Public Libra (NIS)
Northville Public Library (NOR)
OrionsBelt (OAB)
Otten test (OTst)
Pember Library and Museum (Granville) (GRA)
Quaker Street-Duanesburg Branch - Schenectady Coun (QUADUA)
Raquette Lake Free Library (RAQ)
Red Rock Library (RPL)
Richards Library (Warrensburg) (WAR)
Rotterdam Branch - Schenectady County Public Libra (ROT)
Round Lake Library (RDL)
Saratoga Springs Public Library (SAR)
Schenectady Branch - Central (SCP)
Schoharie Free Library (SHO)
Schuylerville Public Library (SVL)
Scotia Branch - Schenectady County Public Library (SCOSCP)
Sharon Springs Free Library (SHS)
Notes
Staff displa
Patron:
Non-public:
PAC display
Item Barcode Status Branch Not ...
BulkCreate003572500 Transferred Link Downtown Br...
BulkCreate003572501 In Shaw Public Library
BulkCreate003572509 In Link West Branch
BulkCreate003572582 In Link East Branch
BulkCreate003572592 In Link North Branch
BulkCreate003572602 In Link South Branch
BulkCreate003572632 In Link Memorial Library
BulkCreate003572662 In Kramer Central Lib...
BulkCreate003572672 In McBreen Branch
Request Histo
Date User Action
kristen.link Request was shipped to the ...
kristen.link Request pickup branch was ...
1/22/2015 1:41:12 PM Pending BulkCreate003572500 Link Downtown Branch kristen.link Primary RTF processing plac...
1/22/2015 1:41:12 PM Active kristen.link Request activated during re...
For Help, press F1
NUM

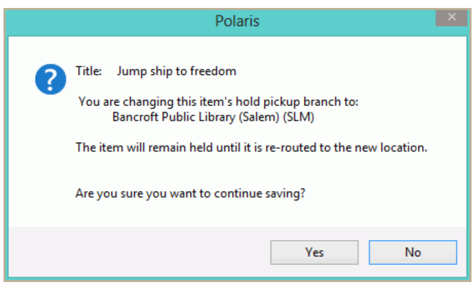
Change the Hold Pickup Location for a Held Item from the Staff Client

A new **Held items to transfer** list view in the Request Manager displays held items that need to be transferred to a new pickup location. If a patron or a staff member changes the pickup location for a held item (a hold request with a status of Held), the item appears in the list.

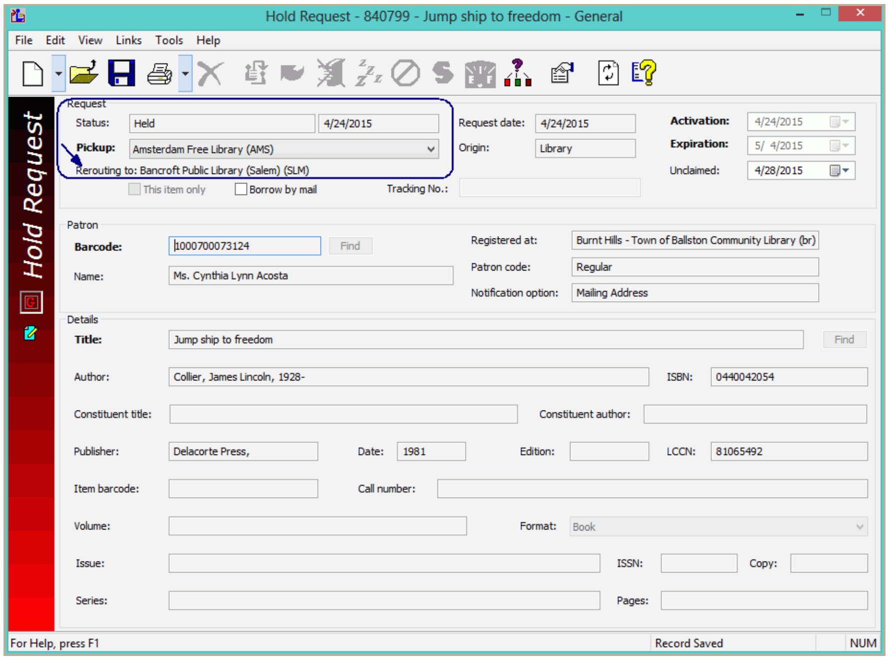
When you change the pickup location for a held item in the staff client, the item must be transferred to the new pickup location. If the item is held at your library (the pickup branch is the same as your log-in branch), and you change the pickup branch, the hold will automatically change from **Held** to **Shipped** (existing functionality). However, if you change the hold pickup location for an item held at another branch, staff at that branch must be alerted that the item must be transferred to the new pickup location.

The following processing occurs when you change the hold pickup location for items held at other branches:

A message informs you that the pickup location was changed and that the item will remain held until it is rerouted to the new location.



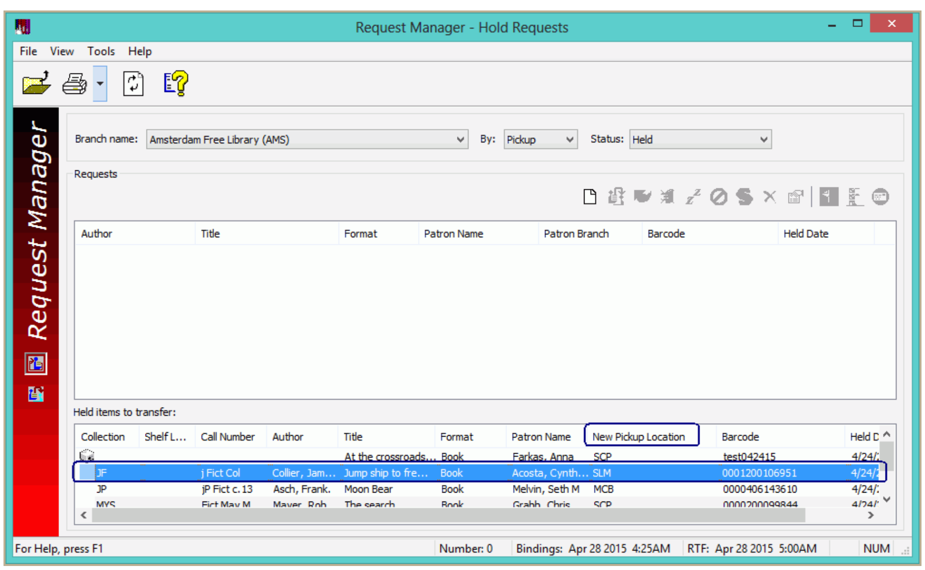
If you select **Yes**, a message under the Pickup box in the Hold Request workform indicates the held item is being rerouted to the new pickup location.



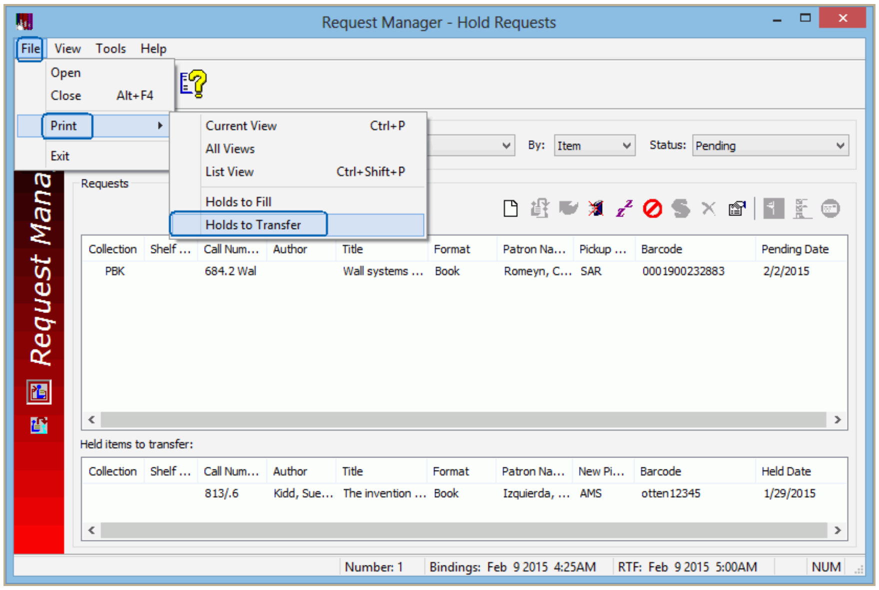
The **Held items to transfer** list in the Request Manager displays the held item that needs to be transferred. This includes held items where the pickup location was changed from the PAC or from the staff client.

Staff can use this list to pull the item from the holds shelf, scan the item in (which assigns the new pickup location), and put the item in-transit to the new location. See "Check-In/Check-Out and Trap the Item for the New Hold Location" on page 15.

> **Note:**
> The Held items to transfer list view is not resizable.

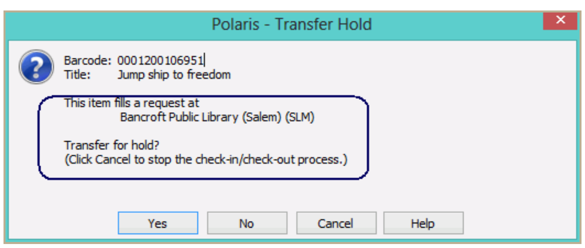


The Holds to Transfer report can be printed from the Request Manager as well as from the standard reports menu. See "Hold Requests to Transfer Report" on page 19. In addition, on the **Print** menu the **Print Holds to Fill** option was changed to **Holds to Fill**.



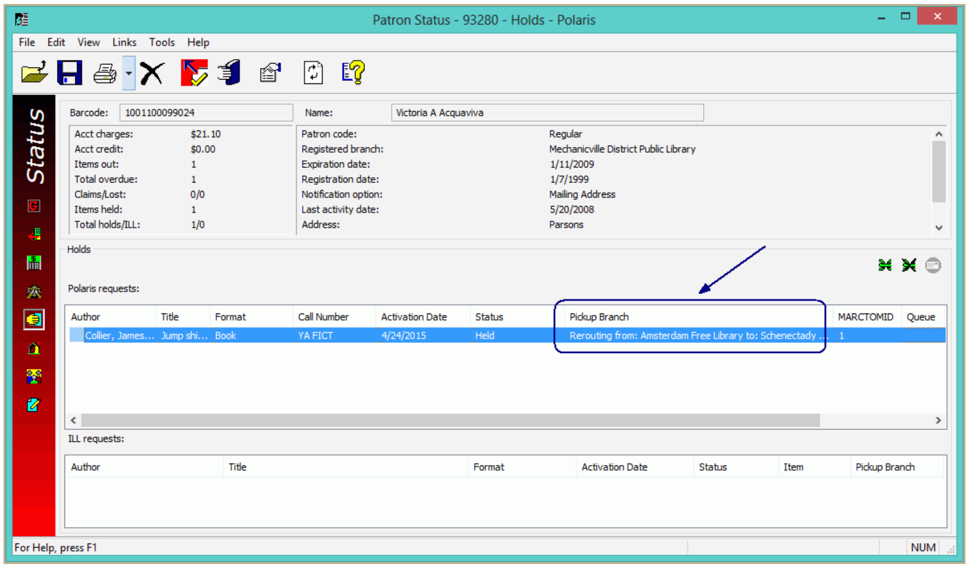
Check-In/Check-Out and Trap the Item for the New Hold Location

When a staff member checks in the held item with the changed pickup location, the Transfer Hold message displays the new pickup location.

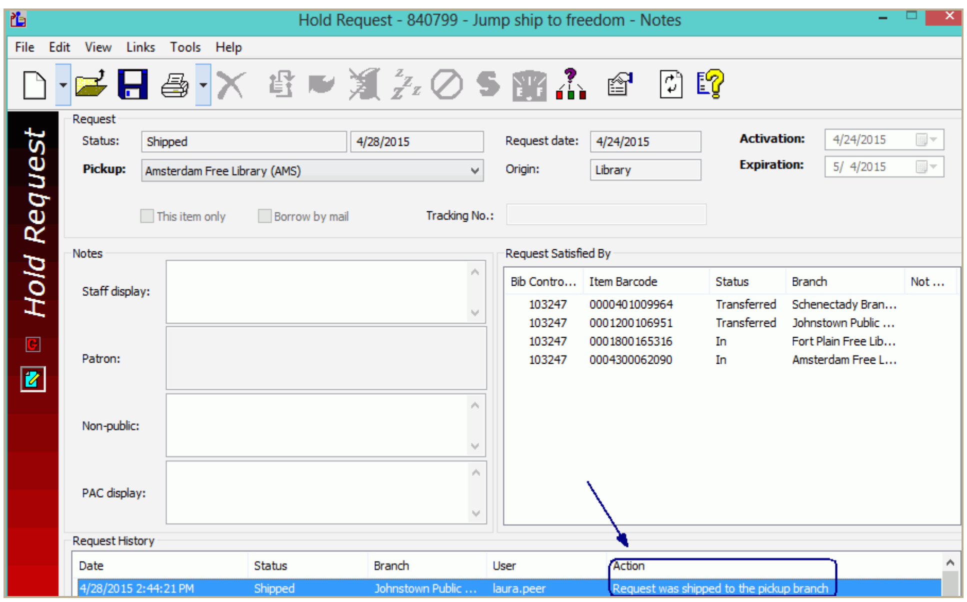


The staff member selects **Yes**, and the hold request's status changes from **Held** to **Shipped**.

On the Holds view of the Patron Status workform, **Rerouting from *[original pickup location]* to *[changed pickup location]*** is displayed in the **Pickup Branch** column.



The Notes view of the Hold Request workform displays **Request was shipped to the pickup branch** in the Action column.



If a held item is checked in or out via a Self Check unit or Polaris Express Check, the item is rerouted to the new location.

New Transaction When Hold Pickup Location is Changed

A new transaction will be posted whenever a patron or staff member changes the hold pickup location. The transaction subtype indicates whether the patron made the change in the PAC (PowerPAC or Mobile PAC).

This allows staff to run reports that use this transaction and analyze how often the hold pickup location is changed, whether it was changed from the staff client or PAC, and for which branches. For example, in Simply Reports, you can run a Holds statistical report and capture the number of times a holds pickup location was changed from the originating pickup branch, and whether the changes were made from the Polaris staff client or the PAC (PowerPAC or Mobile PAC).

Transaction Branch Name (Original Pickup Library)	SubSystem Type (PAC or Staff Client)	Total
Schenectady Branch - Central	PAC	56
Saratoga Springs Public Library	PAC	27
Schenectady Branch - Central	Staff Client	19
Rotterdam Branch - Schenectady County Public Libra	PAC	12
Hadley-Luzerne Public Library	PAC	11
Duane Branch - Schenectady County Public Library	PAC	9
Margaret Reaney Memorial Library (St. Johnsville)	PAC	9
Mary Cay's Branch	PAC	9
Community Library	PAC	8
Link East Branch	Staff Client	8
Inlet Public Library, Town of	PAC	7
Mechanicville District Public Library	PAC	6
Southern Adirondack Library System	PAC	6
Link Downtown Branch	Staff Client	5
Link South Branch	Staff Client	5
Saratoga Springs Public Library	Staff Client	5
Easton Library	PAC	4
Stillwater Public Library	PAC	4
Community Library	Staff Client	3
Easton Library	Staff Client	3
Fort Edward Free Library	PAC	3
Johnstown Public Library	PAC	3
Quaker Street-Duanesburg Branch - Schenectady Coun	PAC	3
Schoharie Free Library	PAC	3
Stony Creek Free Library	Staff Client	3
Amsterdam Free Library	PAC	2
Chester Public Library, Town of	PAC	2
Niskayuna Branch - Schenectady County Public Libra	PAC	2
Rotterdam Branch - Schenectady County Public Libra	Staff Client	2
Stony Creek Free Library	PAC	2
ZZZ-Caldwell-Lake George Library	PAC	2
Bolton Free Library	PAC	1
Cambridge Public Library	PAC	1
Fort Hunter Free Library	PAC	1
Fort Hunter Free Library	Staff Client	1

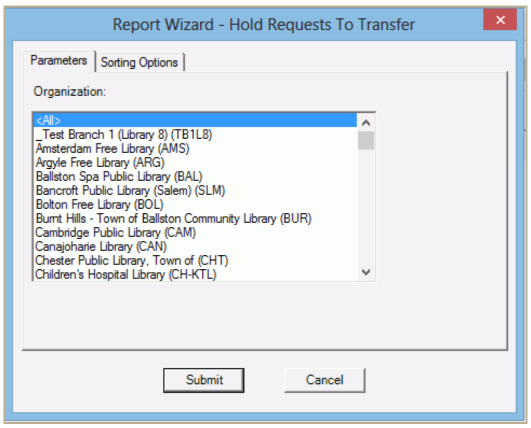
Hold Requests to Transfer Report

With the new Hold Requests to Transfer report, you can see if any **Held** items on the holds shelf need to be rerouted to a new pickup location. As with all standard Polaris reports, this report can be exported in CSV format, which allows for customization.

If the pickup location has been changed for any held items, the report lists them and the branch to which the held items were transferred.The report can be sorted by patron name.

To generate the Holds to Transfer report:

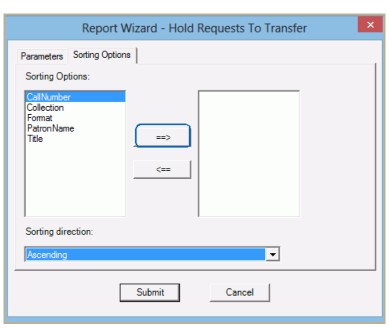
1. Select **Utilities | Reports and Notices | Circulation | Holds | Hold Requests to transfer**.



2. On the **Parameters** tab, select a branch or all branches in the **Organization** box.
3. Select the **Sorting Options** tab, select an option (**CallNumber, Collection, Format, PatronName, Title**) in the list in the left column, and click the right arrow to select the default sort order for the report.

   Note:
   If your holds shelf is arranged alphabetically by the patron's last name, you can sort the report by the patron's name and quickly locate the item to transfer.

4. Select **Ascending** or **Descending** in the **Sorting direction** box.



5. Select **Submit**.

   The report is generated.

   This is an example of the Hold Requests To Transfer report.

Hold Requests To Transfer

Fill Branch: SAR

Coll.	Call Number	Format	Shelf Location	Barcode	Title/Author	New Pickup
ANF	951.9 G	Book		0000200462513	Sing a song to Jenny next/Gardella, Lawrence, -1981	MEC
Patron: Badali, Ashley M / Regular / MEC / 1001100100905 / 315-634-1234, 315-634-1234						
JPBK	J Fict ODe	Book		0000200791408	Sing down the moon/O'Dell, Scott, 1898-1989.	RPL
Patron: Radalin, Moses B / Regular / RPL / 1000501221351 / 315-634-1234, 315-634-1234						
	Fict Coo c.10	Book		0000409204765	The Leatherstocking saga : being those parts of Th/Cooper, James Fenimore, 1789-1851.	STO
Patron: Smith, Johnathon Caldwell / Regular / SAR / 3000845756767334 / 315-888-898465136584, 315-777-777775557846						
PBK	Fict	Book	Racks	0002100200878	China maze/Gardella, Lawrence, -1981	LKP
Patron: Warbach, R. Scott / Regular / JOH / 1001200069356 / 315-634-1234, 315-634-1234						

Second Level Collection Agency Management

With this development, libraries can use a two-step process for managing accounts that have been sent to collections. The first step involves sending patron accounts to collections using existing collection agency processes in Polaris. When the first collection agency reports patron accounts that remain unsettled, the library can implement the second step, which involves securing these patron records to prevent library activity; reporting the accounts to the second collection agency; and releasing patron records when the second collection agency reports back to the library that the accounts have been settled.

> **Note:**
> For an overview of the steps for managing the second collection agency process, see "Second Collection Agency Workflow" on page 22.

This development includes the following features, many of which can also be used for other purposes in patron services:

- A new feature that allows you to populate a patron record set by reading patron IDs from a column in an Excel spreadsheet. See "Add Patron Records to a Record Set Using a File" on page 23.
- A new option to create an item record set from a patron record set. See "Create an Item Record Set from a Patron Record Set" on page 25.
- New permissions that allow staff members to secure and release patron records: **Patron record: Secure** and **Patron record: Release**
- The ability to secure patron records, preventing all circulation and payment activity and most other changes. You can secure an individual patron record using a new **Tools** menu option on the Patron Status workform. Or, you can secure multiple patron records using patron bulk change. See these topics:
  - "Secure a Patron Record from the Patron Status Workform" on page 30.
  - "Use Bulk Change to Secure Patron Records" on page 32.
- Indicators that identify secured patron records on patron workforms and list views. See these topics:
  - "Secured Patron Indicator in Patron Workforms" on page 33.
  - "Secured Patron Indicator in List Views" on page 34.
- The ability to release a secured patron record, allowing circulation activity and other changes, using a new **Tools** menu option on the Patron Status workform . See "Release a Secured Patron Record" on page 36.
- New secured patron filters in SimplyReports. See "SimplyReports Updates" on page 96.

Second Collection Agency Workflow

You can use the following features to manage patron accounts that have been returned from the first collection agency and are now submitted to a second collection agency. For more information on Polaris and collection agencies, see Polaris online Help.

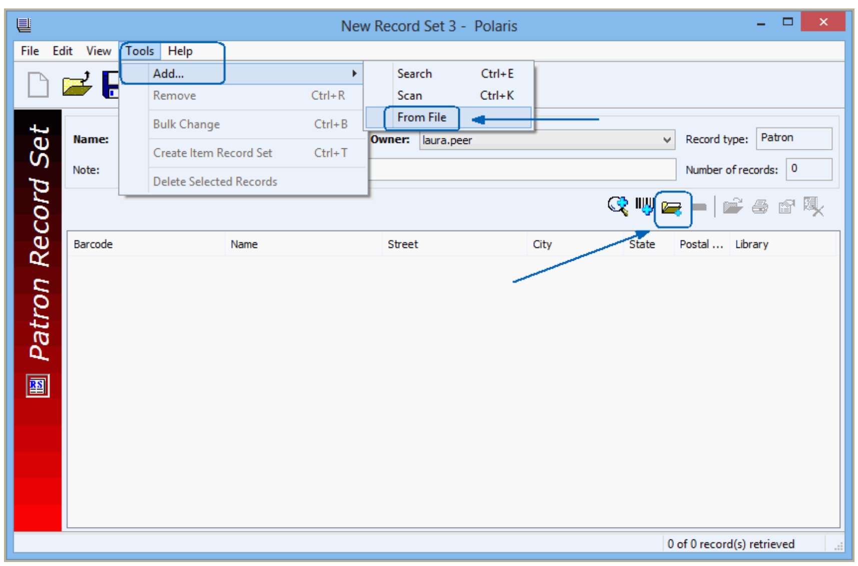
1. The first collection agency (often UMS) sends an Excel file to the library that identifies patron accounts that still have an outstanding debt to the library.
2. A Polaris user adds the patron records to a patron record set using the new **Add from file** option. No data is imported from the Excel file; the file is used to match on the PatronID and pull the appropriate patron records, as they currently exist in the Polaris database, into the record set.
3. The user reviews the record set and removes any patron records that should not be referred to the second collection agency. The user may also select Bulk Change from the patron record set and make any necessary changes to the patron records before sending them to the second collection agency.
4. The user generates an item record set of the items associated with the patron records using options to specify which types of items to include in the item record set.
5. The user can select Bulk Change from the item record set and delete lost items. (This step is necessary because patron records cannot be secured if there are any items still associated with the patron account. Charges can still remain on the account, but all items must be removed before the record can be secured.) Alternatively, if the items are already in Lost status, they will go automatically to Missing or Withdrawn according to settings in the organization’s Lost Item Transition settings in Polaris Administration.
6. The user secures the patron records individually or using the Bulk Change process.
7. The second collection agency attempts to collect the money owed to the library.
8. The second collection agency sends a report to the library listing the patron accounts that are cleared.
9. The library releases the patron records one at a time.
10. On the released patron record, the library waives remaining fines or pays them using “collection agency” payment.

Add Patron Records to a Record Set Using a File

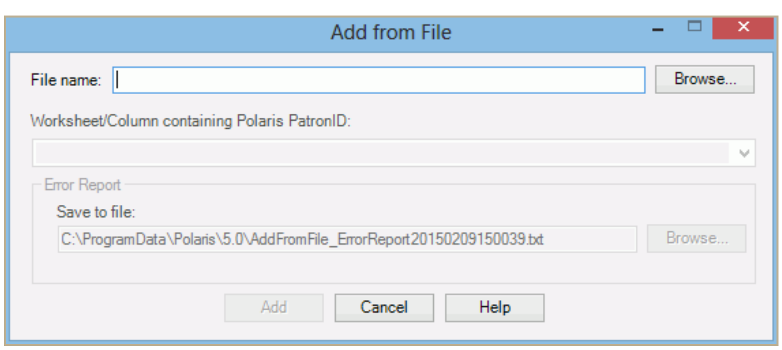
A new **Add from file** feature on the Patron Record Set workform allows you to populate a patron record set by reading patron IDs from a column in an Excel file. When you add patron records to a record set using a file, no data is imported from the Excel file. This process matches the PatronID in the file to the patron record in the Polaris database and adds the record, as it currently exists in the Polaris database, to the record set.

To add patron records by matching on the patron ID in an Excel file:

1. Open a new or existing patron record set.
2. Select **Tools | Add | Add from file** or click the add file icon in list view toolbar.



The Add from File dialog box opens.



3. Click **Browse** to locate and select the Excel file.

   An initalizing window may briefly display while the system scans the columns in the spreadsheet and populates the **Worksheet/Column containing Polaris Patron ID** field.

4. Select the Excel worksheet and column that contains the Polaris PatronID in the **Worksheet/Column containing Polaris Patron ID** box. (If the spreadsheet contains a header row, then the header titles appear in the drop-down list. If the spreadsheet contains no header row, then the first row of data appears in the drop-down list.)
5. Select **Browse** in the **Save to file** box under **Error Report** to specify where to save the error report. The default directory path is from the Patron Services profile, **Default directory** and the default file name is **AddFromFile_ErrorReport\[Todays Date\]**

   Note:
   If you select an existing report file, the messages are appended to the file.

6. Click **Add**.

   A **Preparing file for processing** window may appear, followed by a progress bar. The file is processed and the patron record set is created. While the file is being processed, you cannot do other tasks in Polaris.

   When processing is completed, the Patron Record Set workform displays the patron records that were added from matching the PatronIDs in the file. Each unique patron record appears only once in the record set. (The first 250 records are loaded into the window. If the record set contains more than 250 records, press **Ctrl+Shift+A** to load the entire record set.)

7. Save the record set.

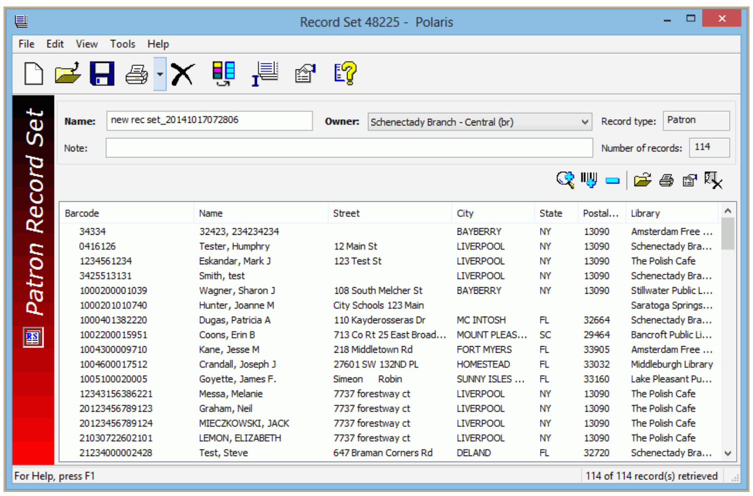
Create an Item Record Set from a Patron Record Set

> **Note:**
> The permissions, **Patron record sets: Access** and **Cataloging record sets: Create** are required to create an item record set from a patron record set. The **Use 'own' cataloging record sets: Allow** is optional.

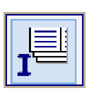
A new **Create Item Record Set** option on the **Tools** menu of the Patron Record Set workform allows you to generate an item record set from the patron record set.

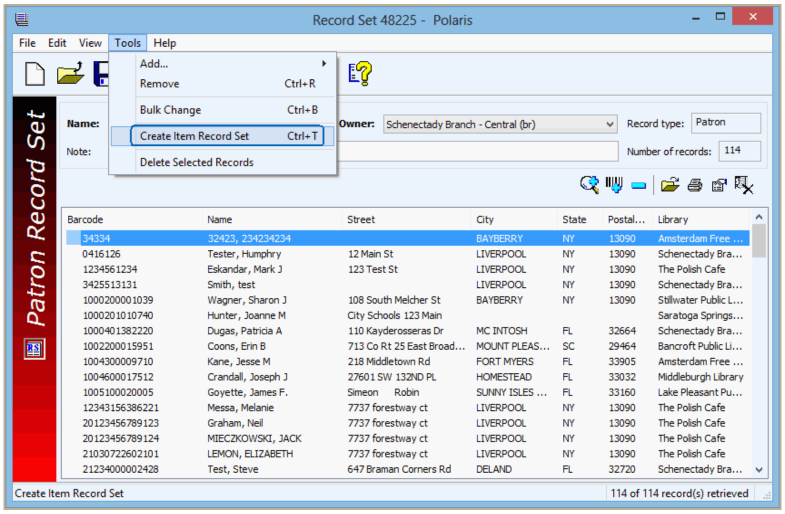
To create an item record set from a patron record set:

1. Open a patron record set.

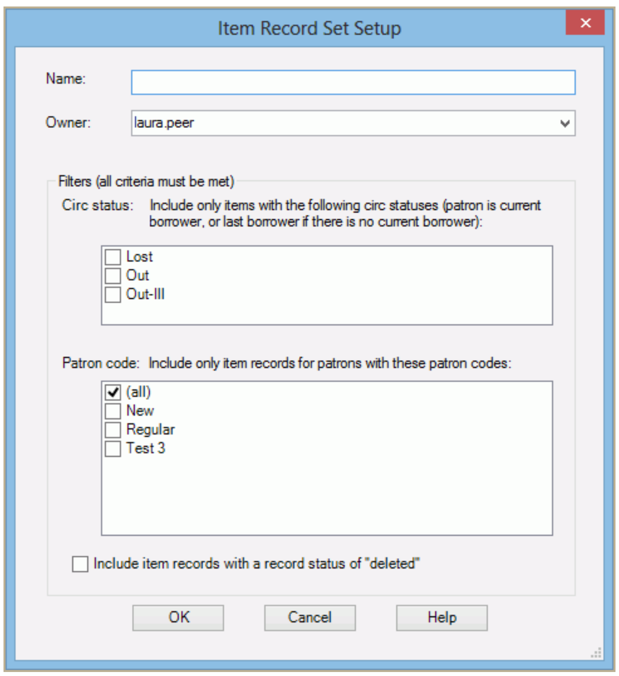


2. Select **Tools |Create Item record set**, press **Ctrl+T**, or click the Create Item Record icon in the toolbar.





The Item Record Set Setup dialog box opens.



3. Type the name for the record set in the **Name** box and select the organization that owns the record set in the **Owner** box.Or, if you have the permission **Use own cataloging record sets: Allow**, you can select your username from the list.
4. Optionally, to filter the record set by the item circulation status, select one or more check boxes under **Circ status**.

5. Optionally, to filter the record set by the patron code, select one or more check boxes under **Patron code**. (A check box appears for each patron code that is used by at least one patron record in the record set)
6. Optionally, to include item records that have a status of deleted, but have not been purged from the database, select the **Include items with a record status of "deleted"** check box.
7. Select **OK**.

   An item record set is created containing any item records with a status other than IN where a patron in the record set is the current borrower (or the last borrower if there is no current borrower.) If any filters were selected, the records must also meet all the selected filter criteria.

   The Item Record Set workform displays an automatically-supplied date/time stamp appended to the record set name and a **Created from patron record set [record set name]** note.

Secure and Release Patron Records

You can secure an individual patron record from the Patron Status workform using a new Tools option, or secure multiple patron records from the Patron Record Set workform using a new Bulk Change option. When you secure a patron record, all circulation and payment activity, and most other patron record updates, are prevented in both the staff client and the PACs (PowerPAC, Mobile PAC, and Children's PAC).

> **Note:**
> If your library uses the secure patron feature and offline circulation, be sure to secure patron records when there is no offline activity and use the most recent offline file.

The following activities are also prevented if a patron is secured:

- Sending Fines notices. Patrons with secured records do not receive Polaris Fines notices, since the assumption is they are now obligated to deal directly with the collection agency regarding their debts. The library can still produce Patron Billing Statements.
- Because secured patron records cannot have any changes made to them (including adding collection agency fees or taking payments), they are never included in collection agency Submission, Update, or Synchronization reports.
- Checking out items or logging into the patron's account from a self check unit
- Deleting the patron record
- Designating the patron as a community representative
- Using Outreach Services for a patron
- Editing a community profile from the PAC (if the patron is already a community representative)
- Checking out in offline mode

> **Important:**
> In this release, Polaris Leap does not support secured patron records. You cannot secure or release patron records in Leap. More importantly, Leap does not prevent circulation and payment activity, or other patron record updates, for secured patron records. Libraries that use Leap should not use the Secure/Release Patron Records feature.

See the following topics:

- "Secure a Patron Record from the Patron Status Workform" on page 30.
- "Use Bulk Change to Secure Patron Records" on page 32.
- "Find Tool Limit by Option Added for Secured Patrons" on page 33.
- "Secured Patron Indicator in Patron Workforms" on page 33.
- "Secured Patron Indicator in List Views" on page 34.

- "Secured Patron Records in the PAC" on page 35.
- "Release a Secured Patron Record" on page 36.

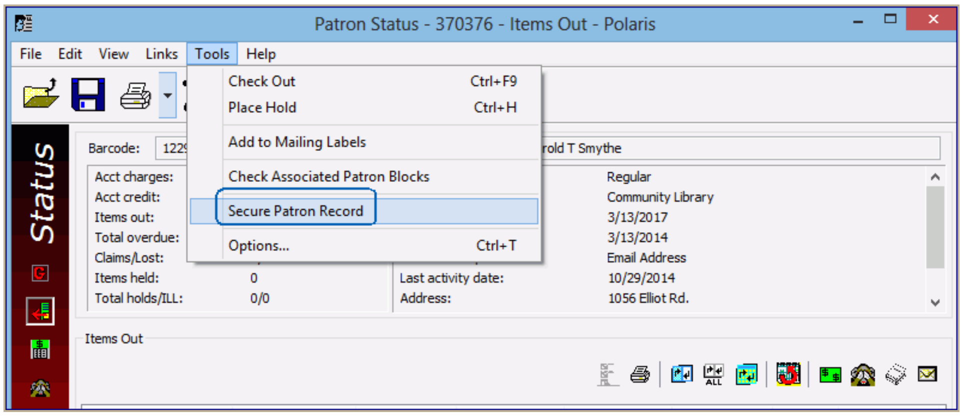
Secure a Patron Record from the Patron Status Workform

Note:
The new permission, **Patron record: Secure**, is required to secure a patron record.

Your library can use this process to prevent the patron from using library services when their account is in collections, or for any other purpose.

To secure a patron record:

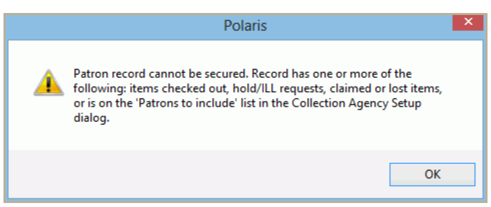
1. Open the patron record in the Patron Status workform.
2. Select **Tools | Secure Patron Record**.



A patron record cannot be secured if any items are associated with the patron (out, lost, claimed) or if hold requests (held, shipped, located, inactive, active, or pending) or ILL requests (active, inactive, or received) are on the patron account. The patron record also cannot be secured if the patron is on the "Patrons to include" list in the Collection Agency Setup dialog for the patron's registered branch.

Note:
Charges on the patron account do **not** prevent it from being secured.

- If the patron record cannot be secured, the following message appears.



- If the patron record can be secured, a message confirms that the record is secured, and a *Patron record secured* transaction is recorded.

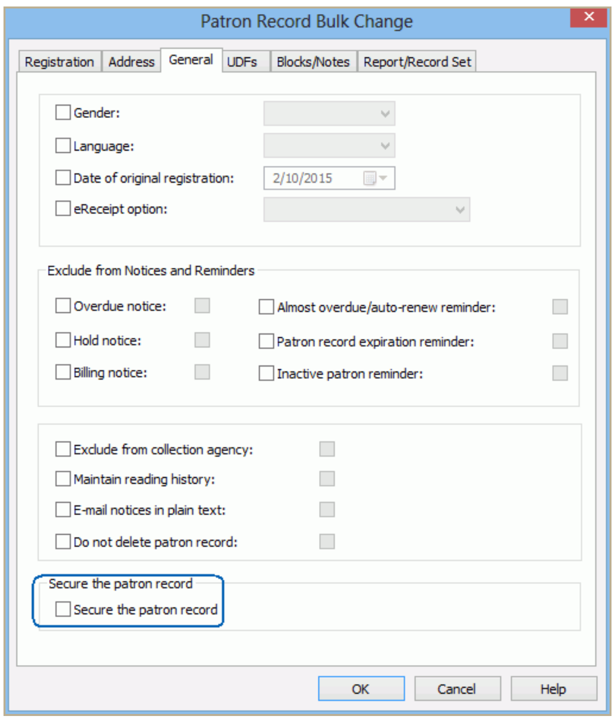

Polaris
Patron record is now secured.
OK

Use Bulk Change to Secure Patron Records

To secure patron records using Bulk Change:

1. Open the patron record set containing the records you want to secure.
2. Select **Tools | Bulk Change**.

   The Bulk Change dialog box opens.
3. Select the **Secure the patron record** checkbox.



4. Click **OK** to initiate the bulk change process to secure the patron records.

   Any records that cannot be secured are reported in the bulk change report.

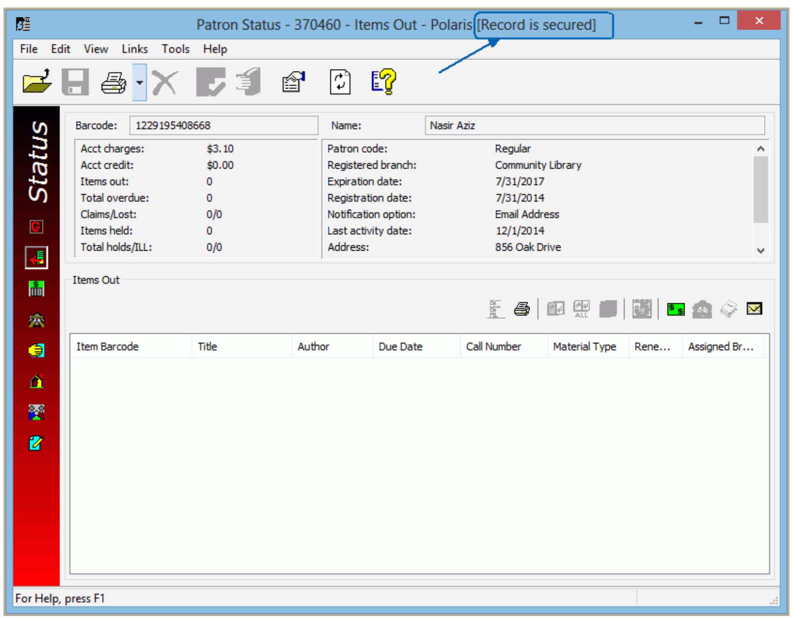
   A *Patron record secured* transaction is recorded for each record.

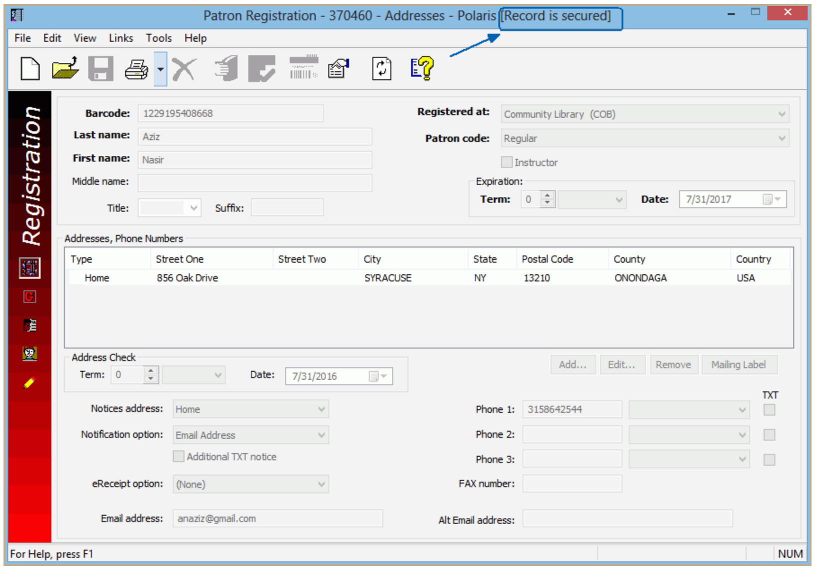
Find Tool Limit by Option Added for Secured Patrons

The **Secured patron** limit by option was added to the patron Find Tool. When you select Secured patron in the Limit by box, the available values are **Yes**, **No**, and **All**. Select **Yes** to retrieve only secured patron records or **No** to retrieve only non-secured patron records. If you select All, no secured patron limits are imposed, and all patrons that meet the other search criteria are retrieved.

Secured Patron Indicator in Patron Workforms

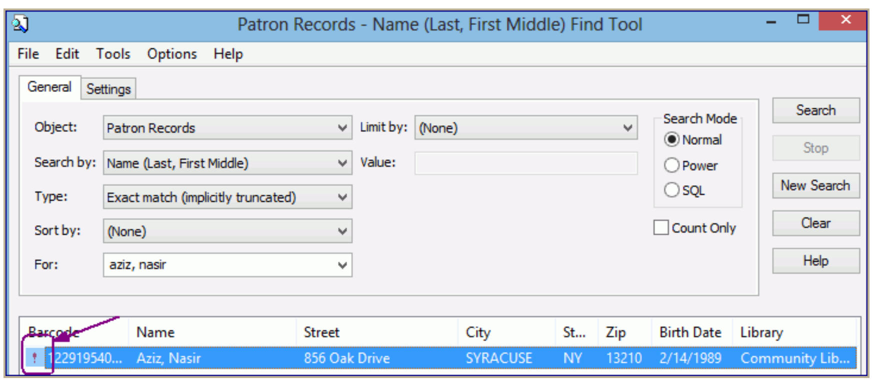
When a patron record is secured, the title bar of the Patron Status and Patron Registration workforms displays: **[Record is secured]**. Many of the menu options and screen elements are greyed out.



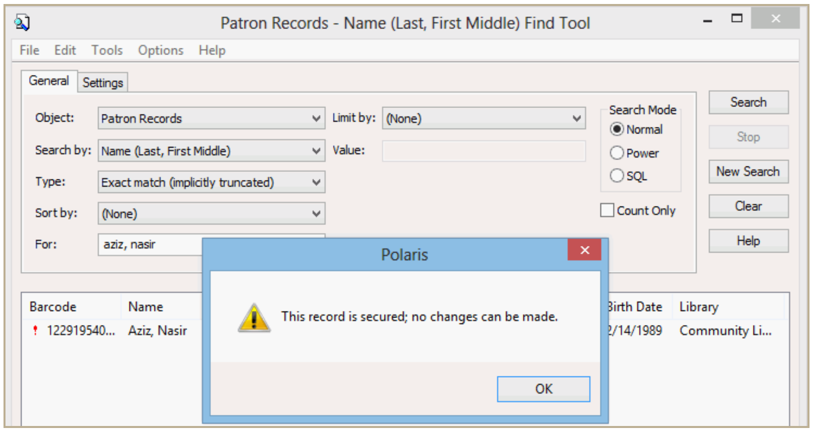


Secured Patron Indicator in List Views

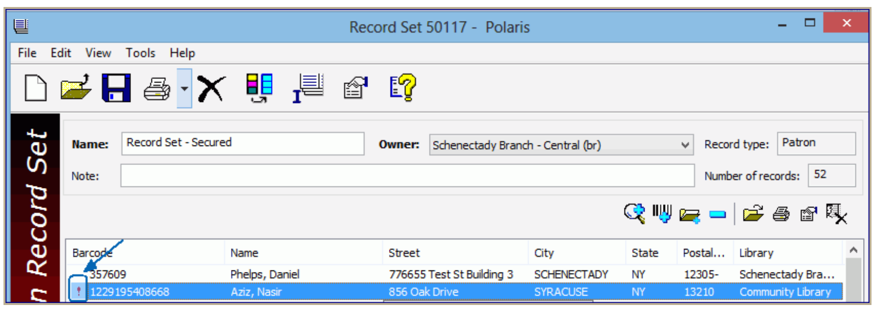
A red exclamation point is displayed in the Find Tool results list and in patron record list views when a patron record is secured.



When you open a secured patron record, a message is displayed.



A red exclamation point displays in a patron record set if the patron's record is secured .



Secured Patron Records in the PAC

Patrons whose records are secured can search the Polaris PACs (PowerPAC, Mobile PAC, and Children's PAC). They can also log in and view their library accounts in the PowerPAC and Mobile PAC, but they cannot place holds, check out eContent, make payments, or change the address or phone 1 field in their patron accounts.

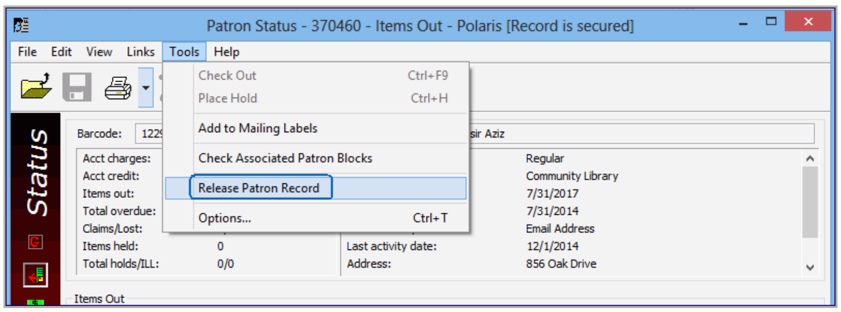
Release a Secured Patron Record

You cannot use the patron Bulk Change process to release secured patrons; they must be released individually.

> **Note:**
> The new permission **Patron record: Release**, set for the patron's registered branch, is required to release a patron record.

To release a secured patron record:

1. Open the Patron Status workform for a secured patron.
2. Select **Tools | Release Patron Record**.



The patron record is released and a confirmation message appears.

In addition, a *Patron record released* transaction is recorded.

Display Associated Patron Accounts in PAC

With this development, libraries can choose what information is displayed in a patron's PowerPAC and Mobile PAC account when the patron is linked to other patrons through Polaris patron association functionality. Libraries can opt to display the "block me" settings for the associated patrons and/or the "allow me" settings for associated patrons.

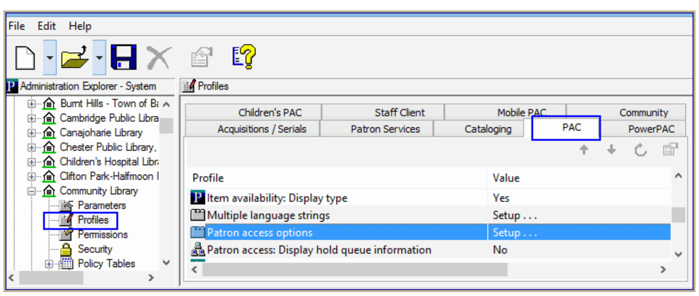
See also:

- "Set Associated Patron Display in the PAC" on page 37.
- "Associated Patron Display in PowerPAC" on page 39.
- "Associated Patron Display in Mobile PAC" on page 40.

Set Associated Patron Display in the PAC

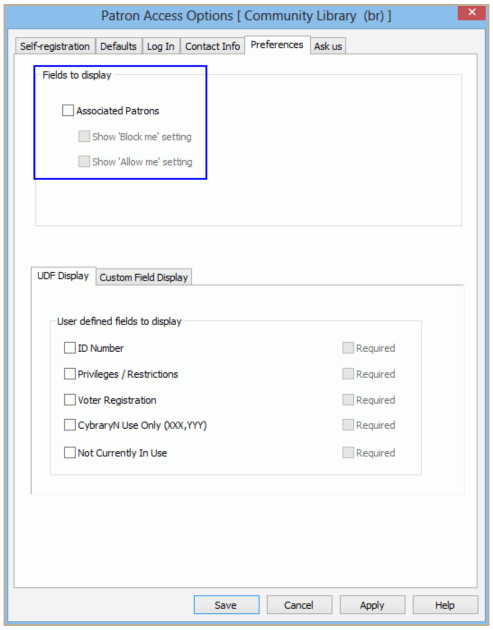
To enable patrons to see information about their associated patrons in the PowerPAC and Mobile PAC:

1. Open the Administration Explorer, and go to the organization (System, Library, or Branch).
2. Select **Profiles**, and select the PAC tab.
3. Double-click **Patron access options**.



The Patron access options dialog box opens.

4. Select the **Preferences** tab.

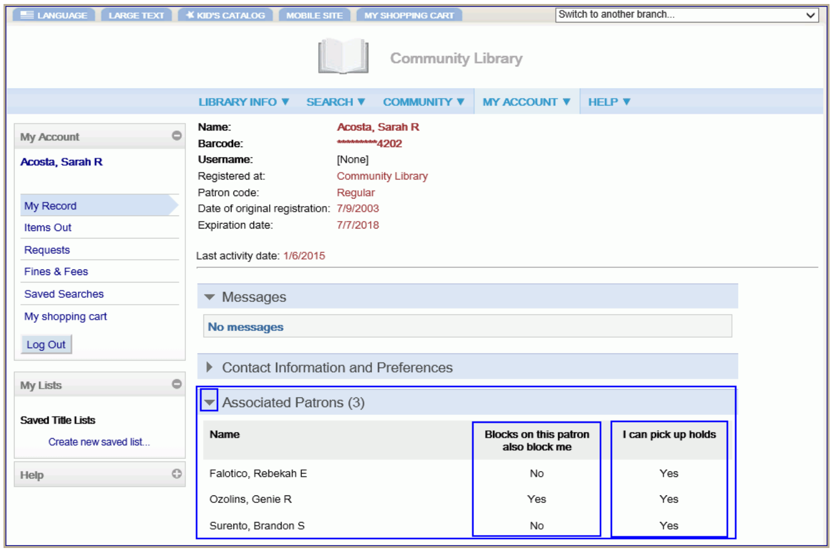


5. Select the **Associated Patrons** check box, and select one or both of these check boxes:

- **Show 'Block me' setting -** When this check box is selected for a branch, patrons registered at this branch can see whether they are blocked when their associated patrons are blocked.
- **Show 'Allow me' setting -** When this check box is selected for a branch, patrons registered at this branch can see whether they are permitted to pick up and check out held items for their associated patrons.

Associated Patron Display in PowerPAC

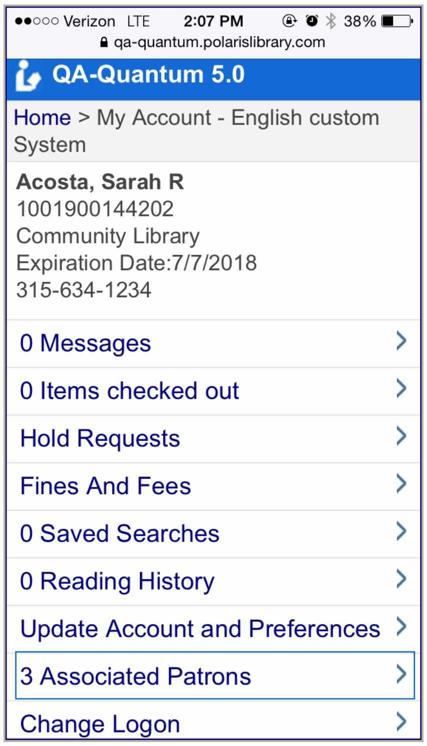
If both the **Associated Patrons** options, **Show 'Block me'** and **Show 'Allow me'**, are selected in the **Patron Access Options** profile for the branch, patrons registered at that branch who have associations can access their account in PowerPAC, expand the **Associated Patrons** area, and see the block and allow settings for each of their associated patrons.



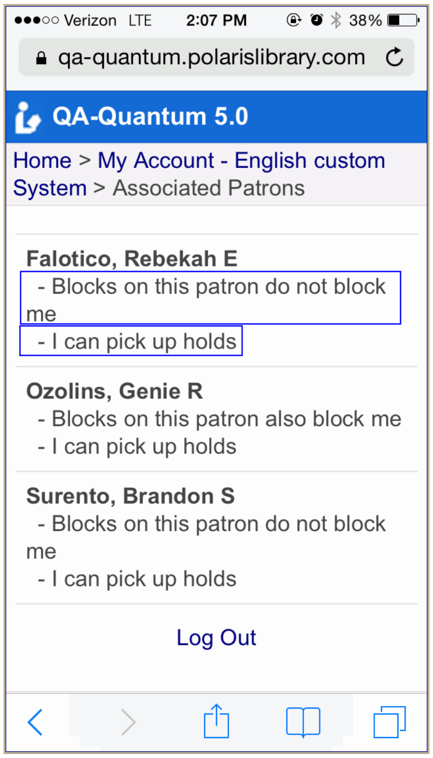
Associated Patron Display in Mobile PAC

If both the **Associated Patrons** options,**Show 'Block me'** and **Show 'Allow me',** are selected in the **Patron Access Options** profile for the branch, patrons registered at that branch who have associations can access their account in Mobile PAC, expand the **Associated Patrons** area by selecting the right arrow, and see the block and allow settings for each associated patron.

Patron account in Mobile PAC



Block and Allow settings for associated patrons in Mobile PAC



Three Levels of Holds Fulfillment

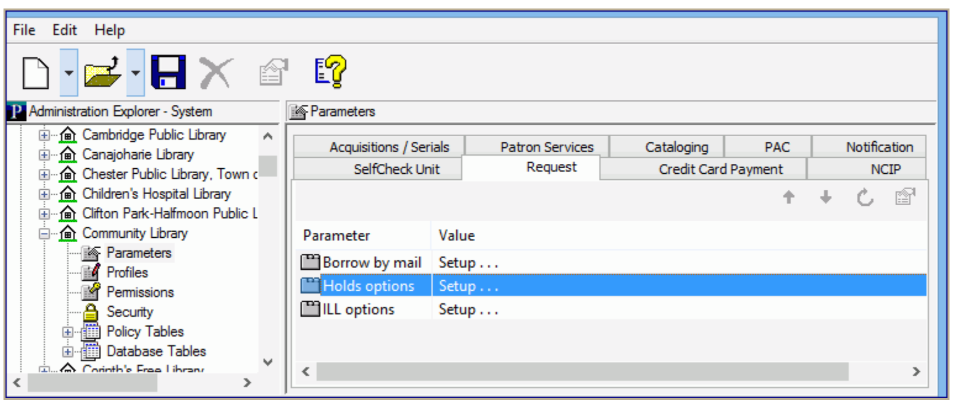
New hold options were implemented so that libraries that have set up trapping preference groups in Polaris Administration can specify another level of preference within the group. If your library uses trapping preference groups, you can set holds trapping within the group to give precedence to hold requests where the pickup location matches the item's assigned branch, or where the patron's registration branch matches the item's assigned branch. See "Set Up Three Level Holds Trapping Preference" on page 42.

Set Up Three Level Holds Trapping Preference

In Polaris Administration, the **Holds options | Queue** tab was modified to include new **in Preference Group** check boxes under **Prefer My Location** and **Prefer My Patron**.

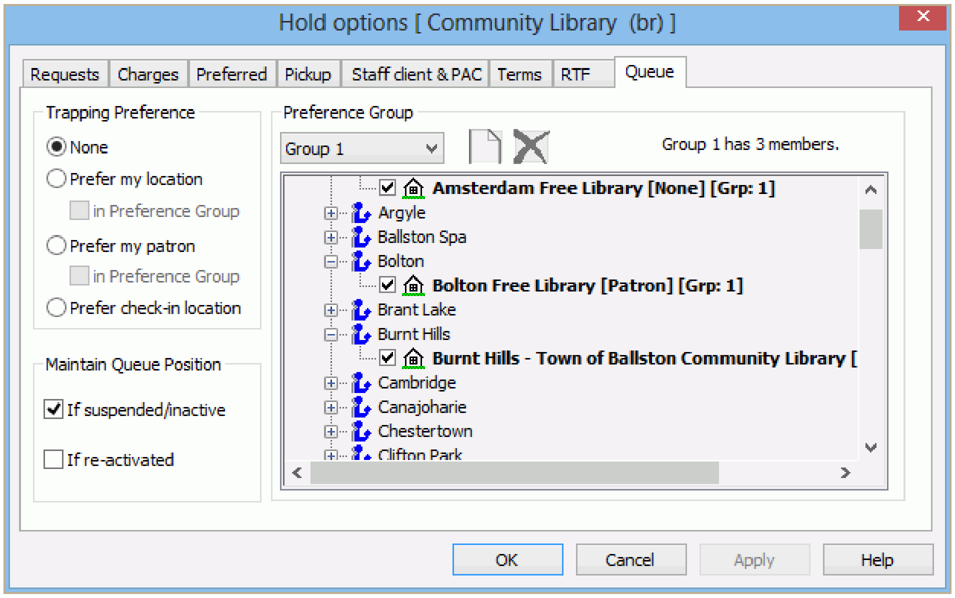
To specify three levels of hold fulfillment checking:

1. Select **Administration, Explorer** and select the organization (system, library, or branch).
2. Select **Parameters** and select the **Request** tab.
3. Double-click **Holds options**.



The Hold options dialog box opens.

4. Select the **Queue** tab.



5. Specify how to apply holds trapping within a preference group:
   - When both **Prefer my location** and **in Preference group** are selected, preference is given to hold requests where the pickup branch is in the preference group, and that branch matches the item's assigned branch. When a hold request has a pickup branch that is in the preference group, and that branch matches the item's assigned branch, the hold is filled ahead of those with other pickup branches in the preference group.
   - When both **Prefer my patron** and **in Preference Group** are selected, preference is given to hold requests where the patron's registered branch is in the preference group, and that branch matches the item's assigned branch. When a hold request is placed by a patron whose registered branch is in the preference group, and that branch matches the item's assigned branch, the hold is filled ahead of those placed by patrons registered at other branches in the preference group.

Suppress EContent Availability Display in PAC

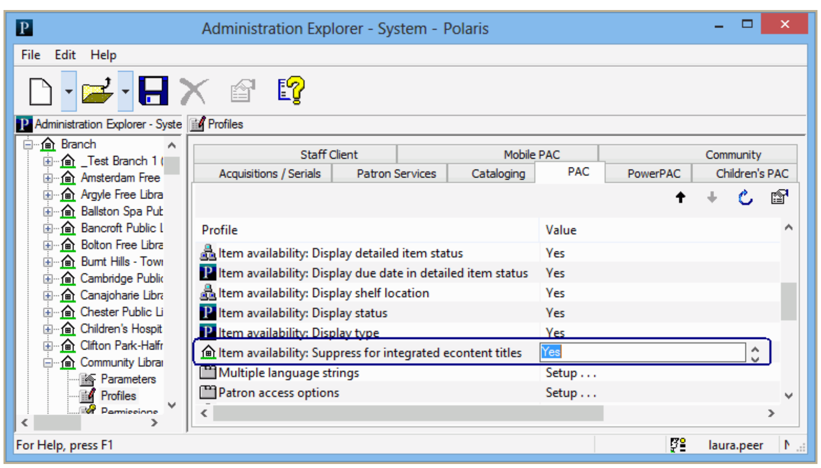
Your library can now prevent detailed availability information from displaying for integrated eContent titles in PAC (PowerPAC and Mobile PAC). When the new PAC profile, **Item availability: Suppress for integrated econtent titles** is set to **Yes** for the branch the patron is connected to, eContent titles display as follows:

- PowerPAC - Neither the **Availability** button nor the **Availability** drawer are displayed for integrated eContent. The availability counts are not affected by this setting and will continue to display.
- Mobile PAC - The **Find It** links do not display for integrated eContent.

Note:
The existing **Suppress availability and requests** profile applies to bibliographic records without any linked items, and generally does not apply to integrated eContent titles, which have linked items. This new option suppresses availability display for integrated eContent titles that have eContent items.

To suppress the availability display for integrated eContent titles:

1. Select **Administration | Explorer**, and select the organization (System, Library, or Branch).
2. Select **Profiles**, and select the **PAC** tab.
3. Double-click **Item availability: Suppress for integrated econtent titles**, and select **Yes**.



4. Select **File | Save** to save your changes.

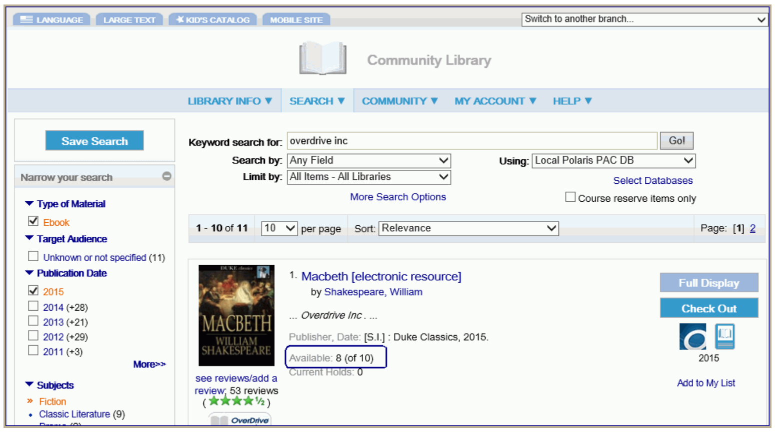
   For examples of integrated eContent title displays when availability is suppressed, see:

- "EContent Availability Suppressed in PowerPAC" on page 45.
- "EContent Availability Suppressed in Mobile PAC" on page 46.

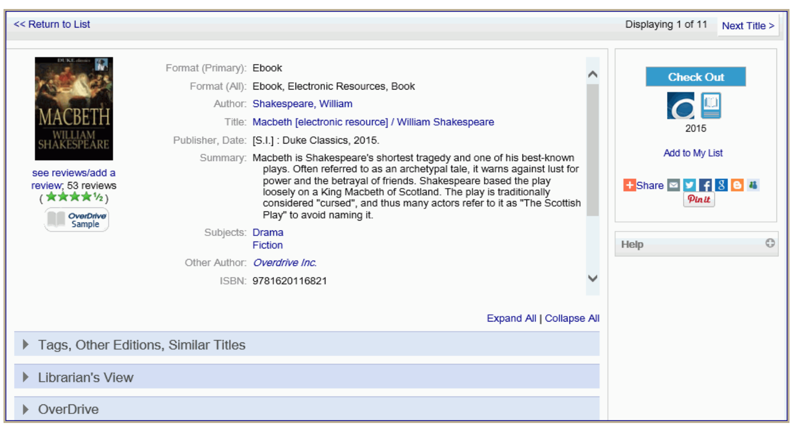
EContent Availability Suppressed in PowerPAC

When the PAC profile, **Item availability: Suppress for integrated econtent titles**, is set to **Yes** for the branch the patron is connected to, the **Availability** button and drawer do not display for integrated eContent titles in PowerPAC. The availability counts display regardless of the profile setting.

The **Availability** button does not display on the title list.

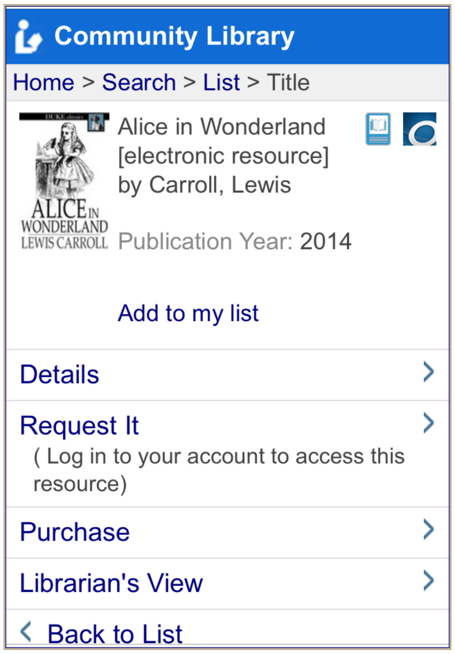


The **Availability** drawer does not display on the product page.



EContent Availability Suppressed in Mobile PAC

When the PAC profile, **Item availability: Suppress for integrated econtent titles**, is set to **Yes** for the branch the patron is connected to, the **Find It** link does not display on the Mobile PAC Title view.

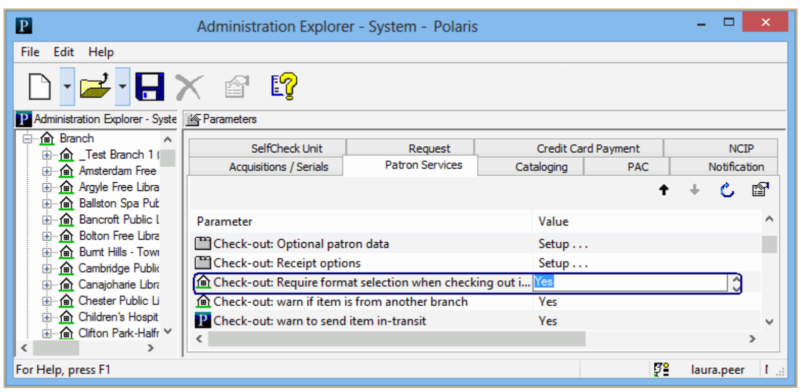


Require Format for Integrated EContent Check Outs in PAC

Your library can now require patrons to select a format when they check out integrated eContent titles from the PowerPAC or Mobile PAC. When the new Patron Services parameter, **Check out: Require format selection when checking out integrated econtent**, is set to **Yes** for the library organization the patron is connected to, the format list defaults to **Please select**, and the patron must select a format from the list to check out the eContent.

To require patrons to select a format when checking out integrated eContent titles in PAC:

1. Select **Administration | Explorer** and select the organization (system, library, or branch).
2. Select **Parameters** under the organization, and select the **Patron Services** tab.
3. Double-click **Check out: Require format selection when checking out integrated econtent** and select **Yes**.



4. Select **File, Save**.

   When this parameter is set to **Yes** for the library organization the patron is connected to, the patron must select the format when checking out integrated eContent titles from the PAC (PowerPAC and Mobile PAC).

Missing Part Check-In/Claim Missing Part Items

Missing Part Check-In functions were introduced in Polaris 5.0, and Service Pack 1 provides these additional options for missing parts:

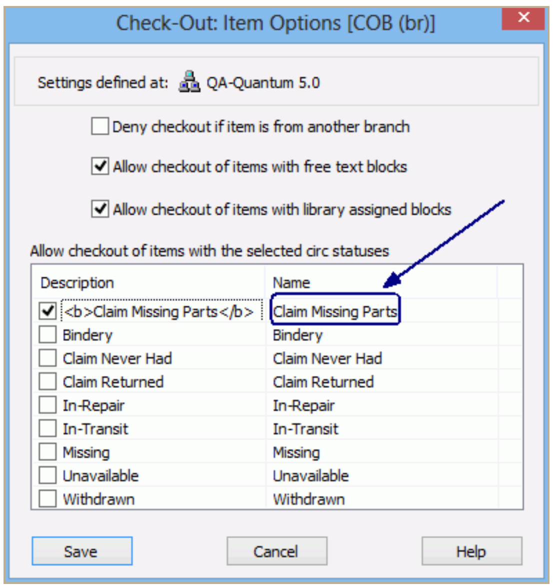
- Missing part notices are now supported in outgoing telephony calls.
- Items in Claim Missing Parts status now appear in the following standard Polaris reports:
    - Claimed Items report - Missing parts was added as a new claim reason.
    - Item Status report - Missing parts status was added as a new line under each library where applicable.
    - Notification Detail Report - Missing parts column was added for all sections.
    - Notification Summary Report - Claim Missing Parts notices are included in the relevant counts for each notice type (email, mailed, phone).
- A new circulation status filter value for items in Claim Missing Part status now appears in Simply Reports. See "SimplyReports Updates" on page 96.
- The Offline Upload report now includes warning messages when items in Claim Missing Part status are checked in or out during offline mode.
- A new SA setting in the Polaris ExpressCheck: Blocking Conditions dialog allows the library to prevent items in Claim Missing Part status from being checked out on an ExpressCheck unit. See "Prevent Check Outs from Polaris ExpressCheck Units for Claim Missing Parts Items " on page 50.
- A new SA setting in the Check-Out: Item Options dialog allows the library to prevent items in Claim Missing Part status from being checked out on a SIP-based Self-Check unit. See "Prevent Check Outs from SIP Self-Check Units for Claim Missing Parts Items" on page 49.

Prevent Check Outs from SIP Self-Check Units for Claim Missing Parts Items

To prevent items with a status of Claim Missing Parts from being checked out from a self-check unit:

1. In the Administration Explorer tree view, expand the organization folder and select **Parameters**.
2. Select the SelfCheck Unit tab in the details view.
3. Double-click **Check out: Item options**.

   The Check-Out: Item Options dialog box appears.



4. Clear the check box next to **Claim Missing Parts to** prevent check outs of items with a status of Claim Missing Parts from a self-check unit.
5. Click **Save** and close the dialog box.

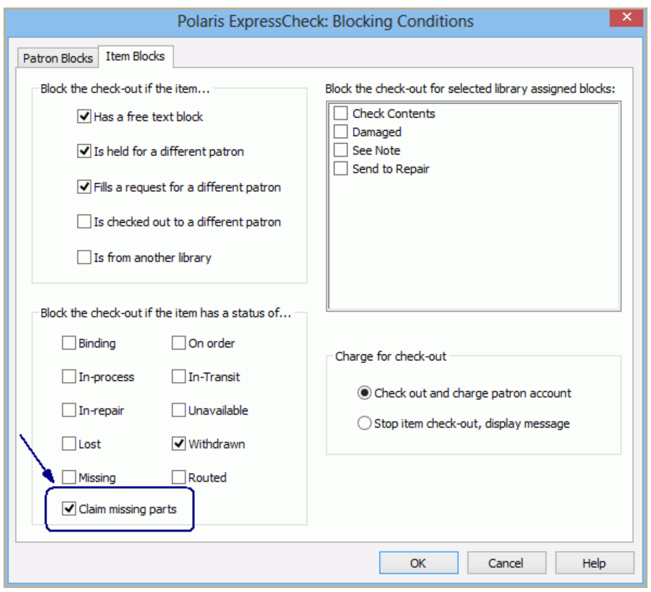
Prevent Check Outs from Polaris ExpressCheck Units for Claim Missing Parts Items

To prevent check outs from Express Check units for items with a status of Claim Missing Parts:

1. In the Administration Explorer tree view, expand the organization folder and select **Parameters**.
2. Select the SelfCheck Unit tab in the details view.
3. Double-Click **Polaris ExpressCheck: Blocking Conditions**.

   The Polaris ExpressCheck Blocking Conditions dialog box opens.

4. Select the Items tab.
5. Select the **Claim missing parts** check box.



6. Select **OK** to close the dialog box.

Display Claimed and Lost Items in Patron Accounts in PAC

New PowerPAC and Mobile PAC **Navigation: Claimed and Lost** profiles are available at the System, Library, and Branch levels. When a patron logs into the PowerPAC or Mobile PAC, the profile setting for the patron's registered branch determines whether claimed and lost items are displayed.

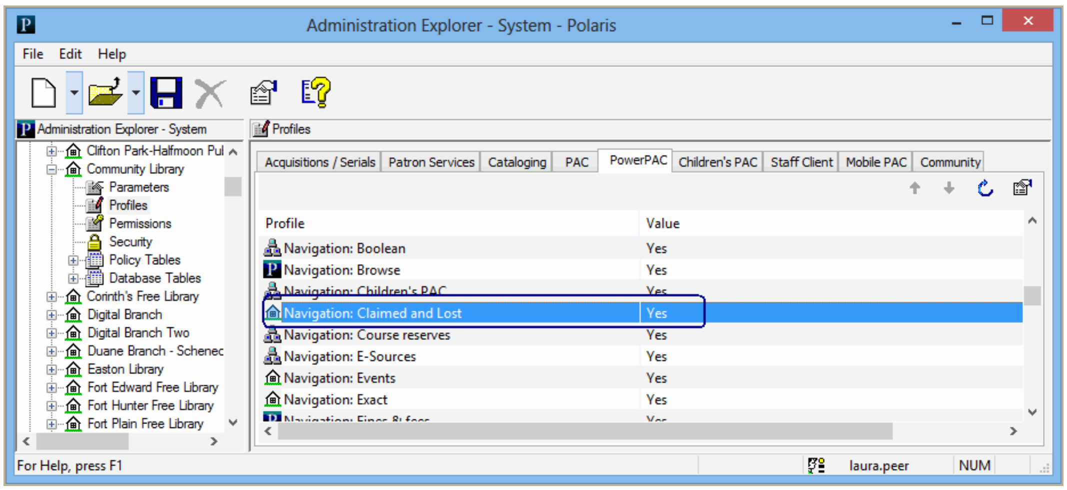
See also:

- "Enable Display of Claimed and Lost Items in PowerPAC" on page 52.
- "Claimed and Lost Items Displayed in PowerPAC" on page 53.
- "Enable Display of Claimed and Lost Items in Mobile PAC" on page 54.
- "Claimed and Lost Items Displayed in Mobile PAC" on page 55.

Enable Display of Claimed and Lost Items in PowerPAC

To enable lost and claimed items to display in the patron account view in PowerPAC:

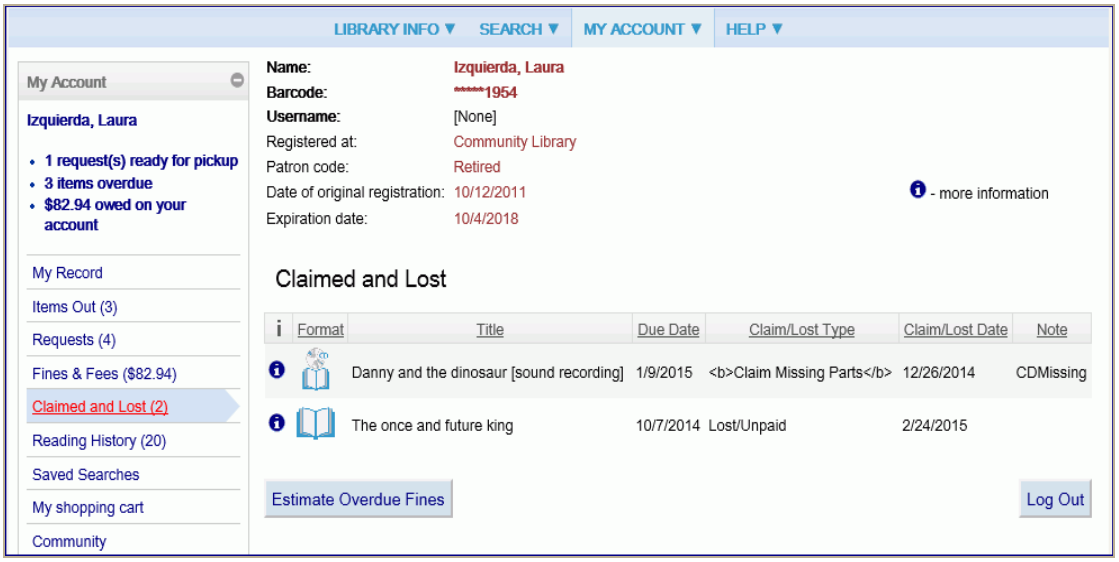
1. Select **Administration | Explorer**.
2. Select the organization (System, Library, or Branch).
3. Select **Profiles**, and select the **PowerPAC** tab.
4. Double-click **Navigation: Claimed and Lost**, and select **Yes**.



If this profile is set to **Yes** for the patron's registered branch, when the patron logs into his or her account in PowerPAC, any claimed or lost items the patron has are displayed in the Claimed and Lost view. See "Claimed and Lost Items Displayed in PowerPAC" on page 53.

Claimed and Lost Items Displayed in PowerPAC

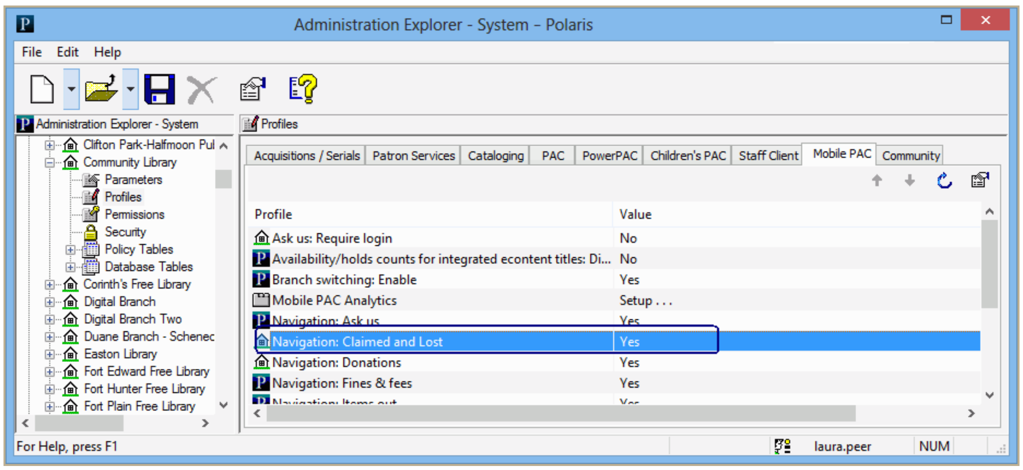
If the **Navigation: Claimed and Lost** PowerPAC profile is set to **Yes** for the patron's registered branch, any claimed or lost items will display in the patron's PowerPAC account when the patron logs in and selects the Claims and Lost view.



Enable Display of Claimed and Lost Items in Mobile PAC

To enable the display of claimed and lost items in Mobile PAC:

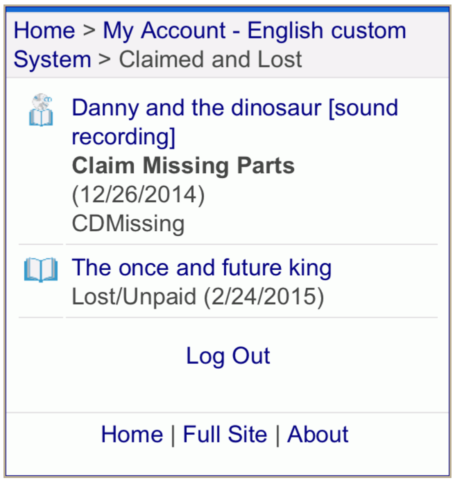
1. Select **Administration | Explorer**.
2. Select the organization (System, Library, or Branch).
3. Select **Profiles**, and select the **Mobile PAC** tab.
4. Double-click **Navigation: Claimed and Lost**, and select **Yes**.



If this profile is set to **Yes** for the patron's registered branch, when the patron logs into Mobile PAC, any items that were claimed or declared lost are displayed on the Claimed and Lost view. See "Claimed and Lost Items Displayed in Mobile PAC" on page 55.

Claimed and Lost Items Displayed in Mobile PAC

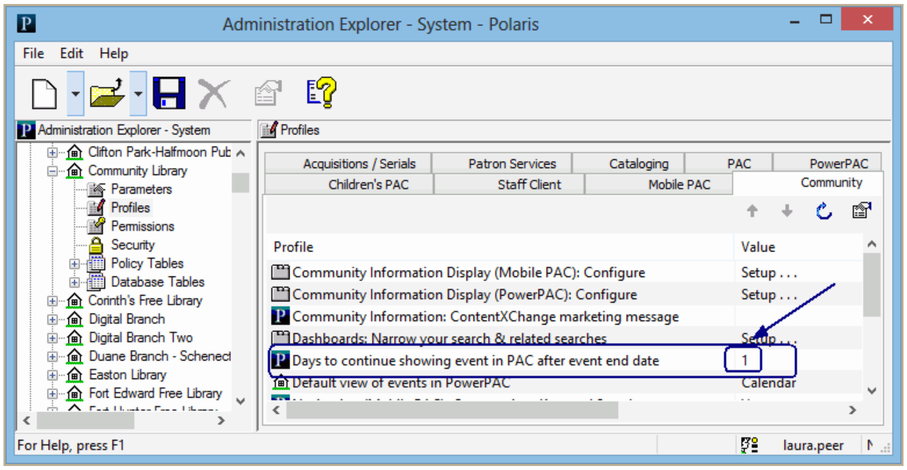
If the **Navigation: Claimed and Lost** Mobile PAC profile is set to **Yes** for the patron's registered branch, any claimed or lost items will display in the patron's Mobile PAC account when the patron logs in and selects the Claims and Lost view.



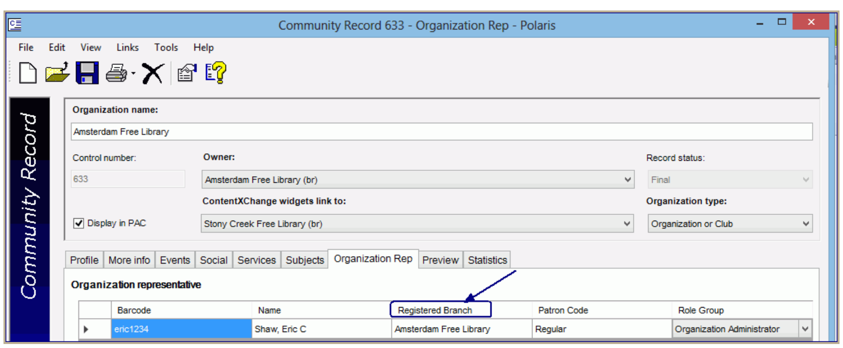
Updates to Community Profiles

The following changes were made to Polaris Community Profiles:

- In Polaris Administration, the default setting was changed from **7** days to **1** day in the **Days to continue showing event in PAC after event end date** profile on the Community tab.



- On Organization Rep tab of the Community Profile workform, the **Organization** column header was changed to **Registered Branch** to distinguish the library branch organization in Polaris from the community organization for which the profile was created.

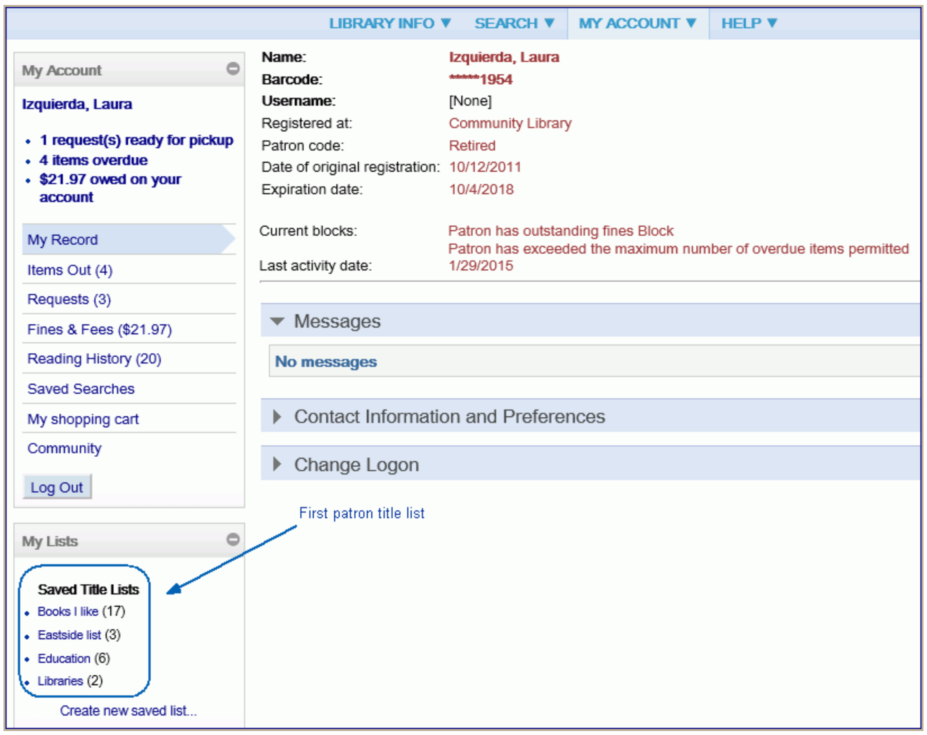


Saved Title Lists in Merged Patron Records

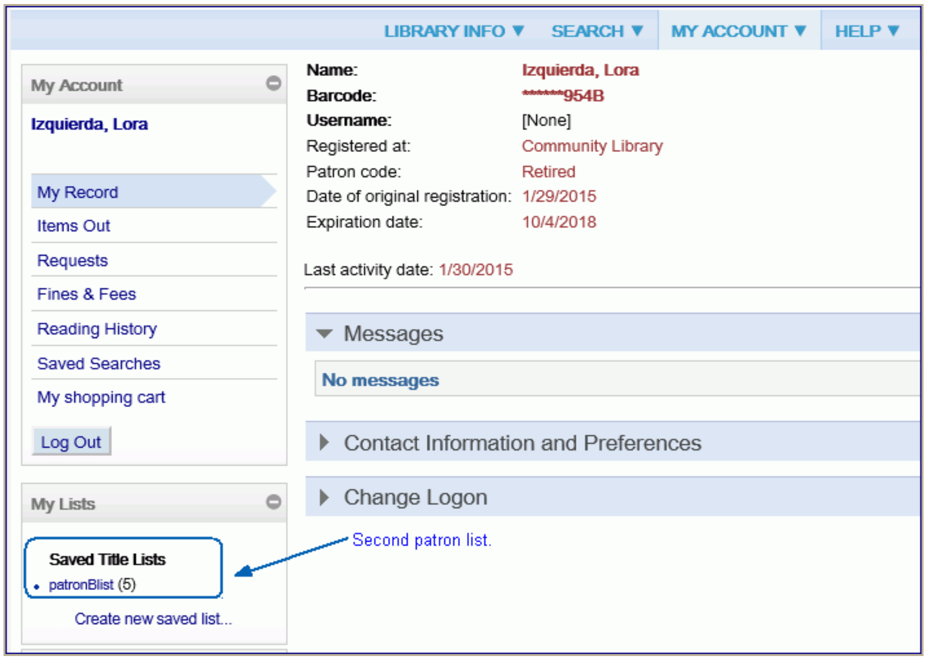
Now, when patron records are merged, and both the primary and secondary patron's records have saved title lists, the secondary patron's title list is moved to the primary patron's title list. If both title lists have the same name, a number 2 is appended to the secondary patron's title list name, and both lists display in the primary patron's record.

Examples:

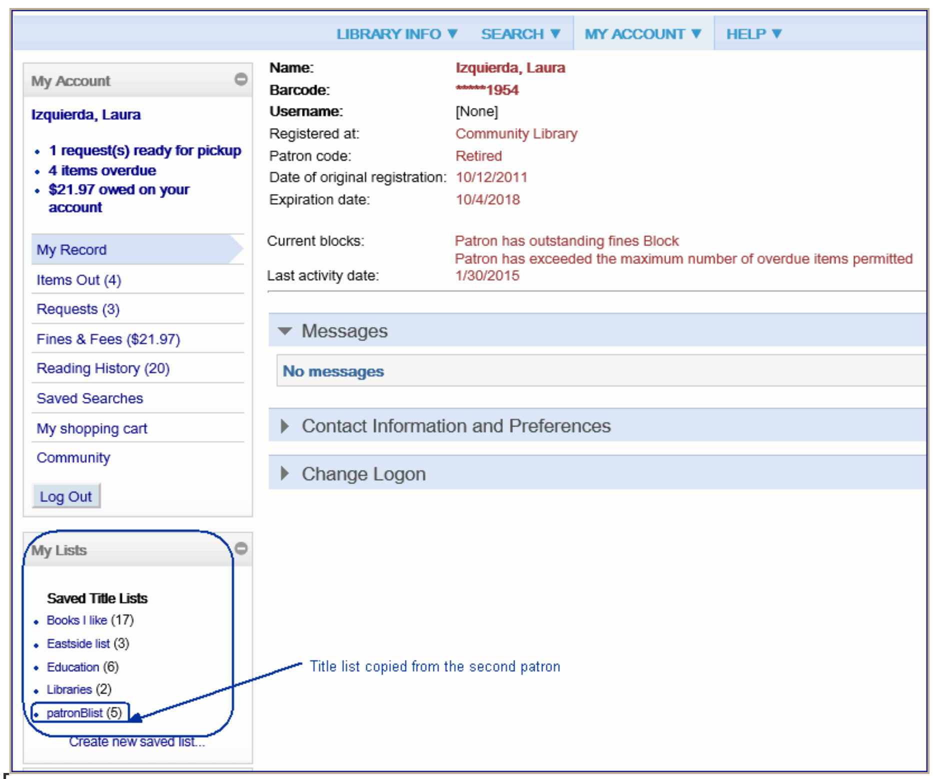
Title lists for primary patron



Title list for secondary patron



Title lists for primary patron after the merge



[

Fusion Records Excluded from Auto-Display in PAC

Bibliographic records that are linked to Fusion resource records are now excluded from Automatic Display-in-PAC processing.

Polaris Leap Development

Leap development for 1.0 SP1 includes the following new and enhanced functions, navigation, search capabilities, and other improvements:

- Permissions in Polaris Administration to allow access to Leap and control remote access, and permissions checking for Item and Bibliographic records in Leap that matches permission checking for these records in the Polaris ILS. See "Permissions Checking for Item and Bibliographic Records" on page 1.
- Enable Leap access for a Workstation record in Polaris. See "Enable Leap Access for a Workstation" on page 64.
- Workform tracker view enhancements. You can now close all workforms from the Workform tracker view, filter the open workforms, and pin the view so that it remains open. See "Updates to the Workforms Tracker View" on page 65.
- Keyboard shortcuts are now on the Help menu. See "Keyboard Shortcuts on Help Menu" on page 66.
- Return to the previous view. When you close a workform, view, or dialog box, Leap displays the previous view. See "Return to the Previous View" on page 66.
- Link to records from workforms and message boxes. See "More Record Linking Options Added" on page 68.
- Find Tool enhancements including expanded view, user defaults, browse searching, and a count only option. See "Leap Find Tool Updates" on page 70.
- Delete a patron record from the Registration view. See "Delete a Patron Record" on page 75.
- Copy a patron registration. See "Copy Patron Registration" on page 76.
- Opt out of reminder notices check boxes added to the Patron Registration page. See "Opt Out of Notices Check Boxes Added to Patron Registration" on page 81.
- Renew a patron registration and update the **Address check date** at the same time. See "Update Patron Registration Renewal Dates" on page 81.
- Custom data fields, if applicable, are displayed and the field values can be updated on the Patron Registration page. See "Custom Data Fields Display in Patron Record" on page 83.
- Check in an item from the Item Record. See "Check In From the Item Record" on page 84.
- Circulate Quick Circ items. See "Circulate Quick Circ Items" on page 85.
- Manage charge for check-out or renewal. See "Manage Charge for Check-outs/Renewals" on page 86.
- Patron Associations functions in Leap were aligned with recent developments in the Polaris ILS. See "Updates to Patron Associations" on page 89.
- Picklist improvements. See "Picklist Changes" on page 95.

Leap Access Permissions and Permissions Checking

The following updates were made to Polaris Administration permissions that control Leap and permissions checking.

Leap Access Permissions

New permissions were added to Polaris Administration to control access to the Polaris Leap application. The **Access Leap: Allow** permission must be granted to all staff members who will be using Leap. The **Access Leap remotely: Allow** is used to control access to Leap outside of the library system's network. These permissions are not granted by default.

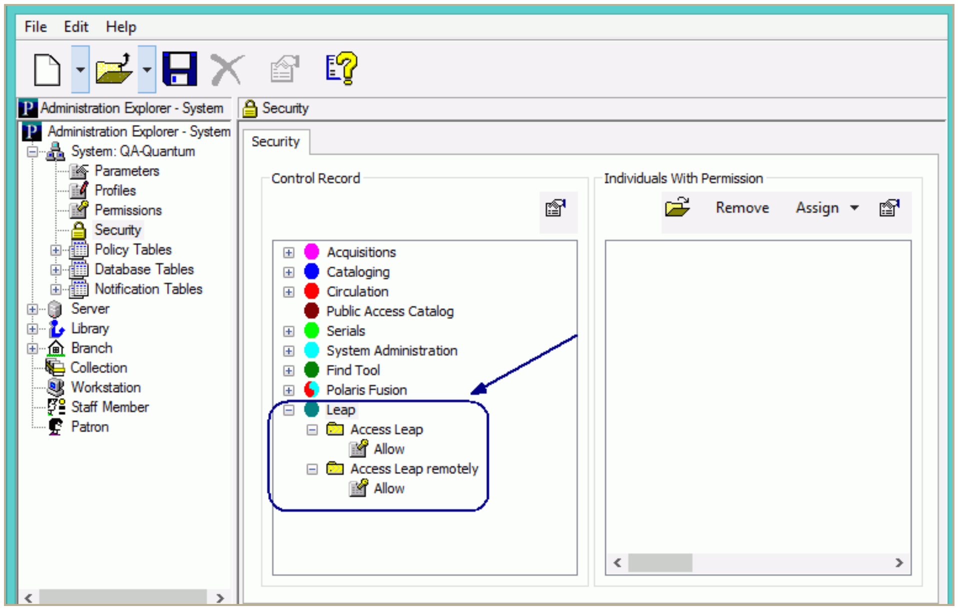
If your library wants to limit who can access Leap remotely, two Leap web applications must be set up, which can be on the same server or different servers. One will be used for staff accessing Leap through the library's network with restrictions based on the library's internal IP address. The second Leap web application will be set up to accept all connections, but access will be granted only if the staff member has the permission **Access Leap remotely: Allow**.

Two URIs are required if your library wants to restrict remote access, for example:

https://mylib.org/leapwebapp

https://mylib.org/leapwebappexternal

Note:
If your library plans to restrict access to Leap depending on the staff member's location, contact your Polaris support representative.


File Edit Help
Administration Explorer - System
Security
Administration Explorer - System
System: QA-Quantum
Parameters
Profiles
Permissions
Security
Policy Tables
Database Tables
Notification Tables
Server
Library
Branch
Collection
Workstation
Staff Member
Patron
Security
Control Record
Individuals With Permission
Remove
Assign
Acquisitions
Cataloging
Circulation
Public Access Catalog
Serials
System Administration
Find Tool
Polaris Fusion
Leap
Access Leap
Allow
Access Leap remotely
Allow

Permissions Checking for Item and Bibliographic Records

Permissions checking for Item and Bibliographic records now matches the Polaris ILS requirements:

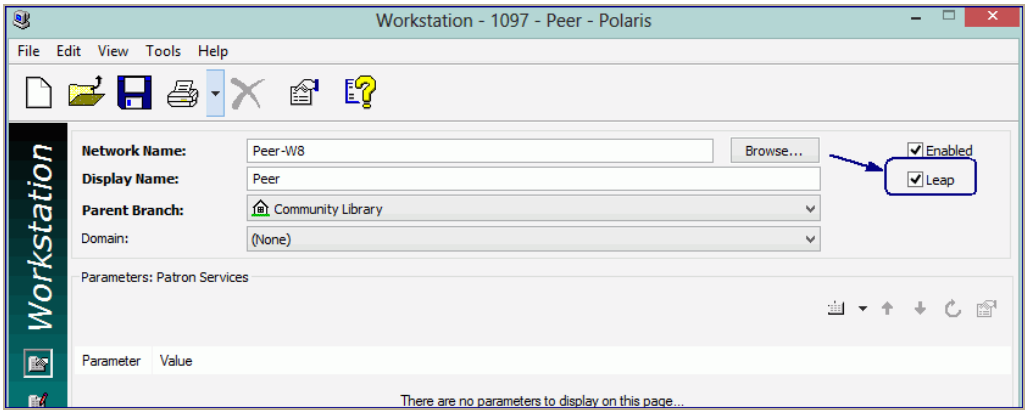
- To access an Item Record in Leap, the following permissions are required: **Access cataloging subsystem: Allow** and **Item record: Access**
- To access a Bibliographic Record in Leap, the following permissions are required: **Access cataloging subsystem: Allow** and **Bibliographic Record: Access**

For more information on permissions, see the Polaris staff Help.

Enable Leap Access for a Workstation

A new check box on the Workstation workform in Polaris Administration enables access to Leap from that workstation.The check box appears on the Workstation workform when the parent branch or system is licensed for Leap. If the check box is unchecked, users will not be able to log into Leap from the in-network workstation.

> **Note:**
> If the user is outside of the library's network, the workstation does not appear in the Workstation drop-down list box at logon.



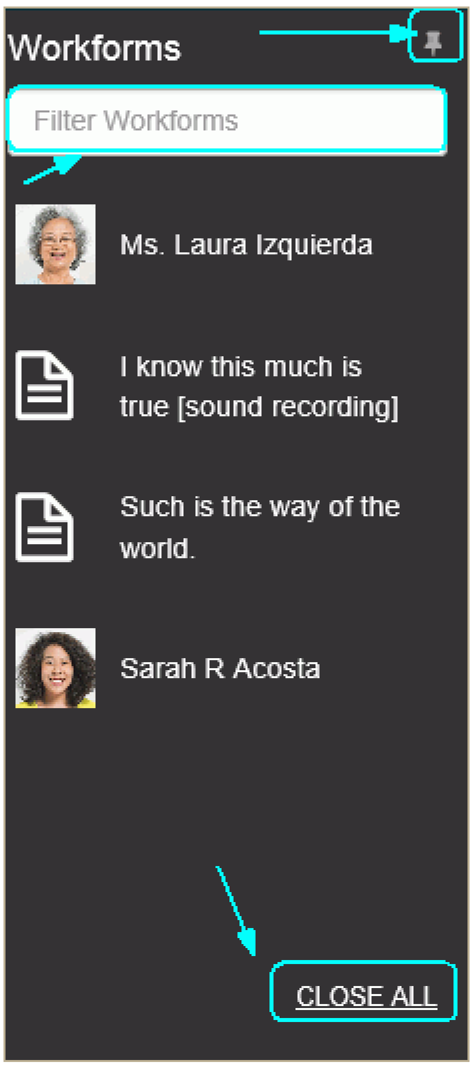
Updates to the Workforms Tracker View

The following changes were made to the Workforms tracker view:

- A new filter box was added which filters the workform list as you type.
- A pushpin icon was added that you can select to pin the Workforms tracker view so that it remains visible on all Leap pages.

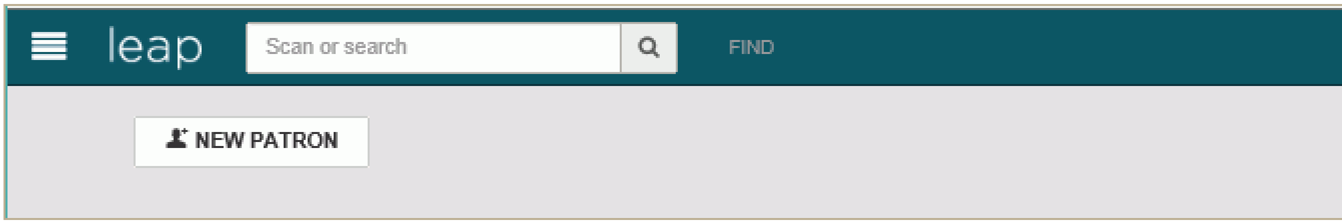
Note:
The Workform tracker view cannot be pinned on an iPad.

- A **CLOSE ALL** option was added to the bottom of the Workforms tracker view. When you select **CLOSE ALL**, all open Leap workforms are closed.



Keyboard Shortcuts on Help Menu

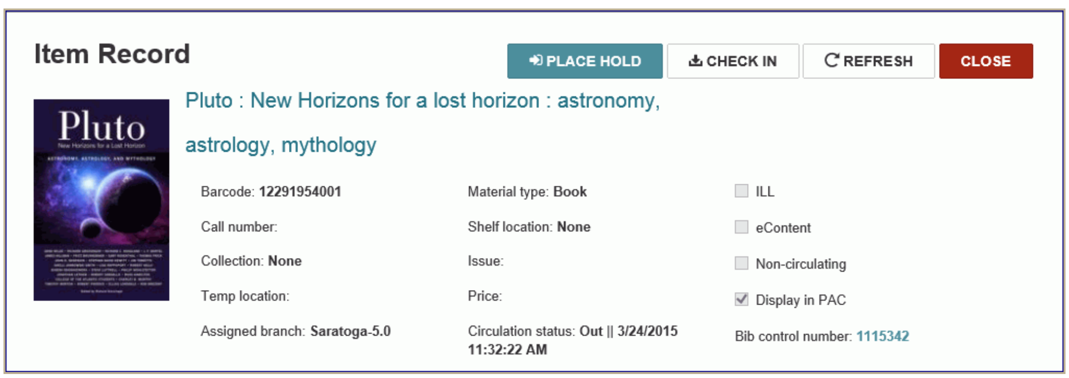
The Keyboard Shortcuts list is now under the Help menu in Leap.



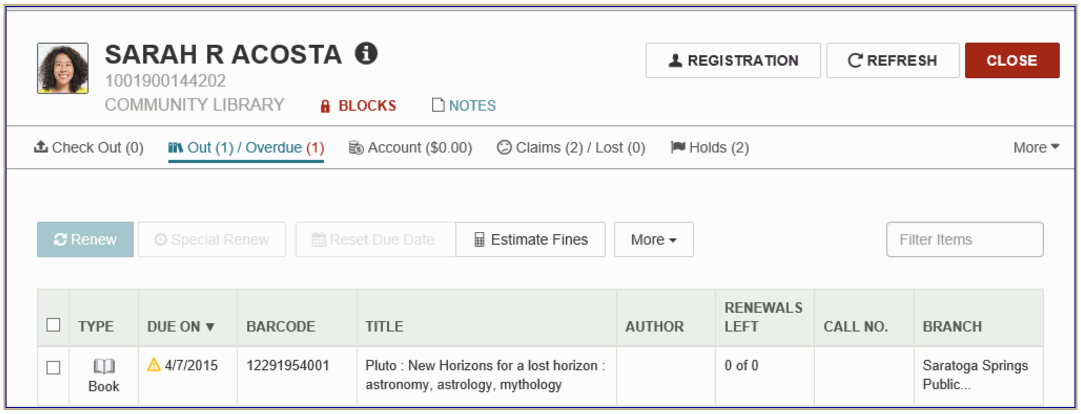
Return to the Previous View

When you close a workform or view, Leap returns to the previously displayed workform or view. For example, if you open an item record from the patron's items out list, and then close the Item Record workform, you return to the items out list.

Item record opened from the patron's Out view. Select **CLOSE**.



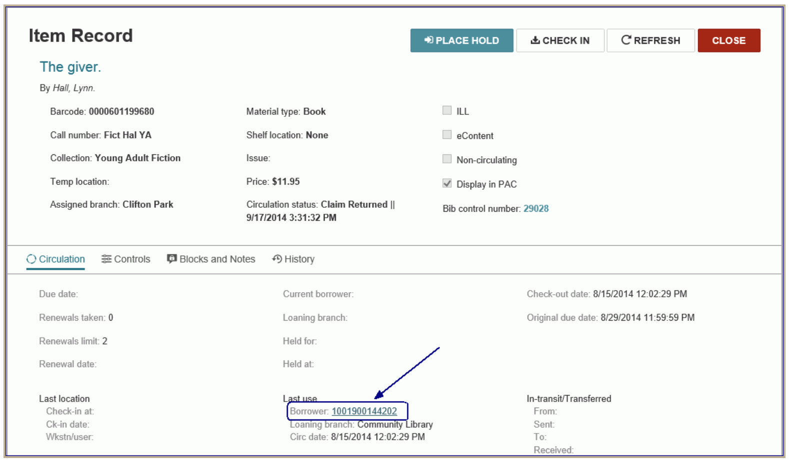
The patron's items out view, is displayed.


SARAH R ACOSTA
1001900144202
COMMUNITY LIBRARY
BLOCKS
NOTES
REGISTRATION
REFRESH
CLOSE
Check Out (0)
Out (1) / Overdue (1)
Account ($0.00)
Claims (2) / Lost (0)
Holds (2)
More
Renew
Special Renew
Reset Due Date
Estimate Fines
More
Filter Items
TYPE
DUE ON
BARCODE
TITLE
AUTHOR
RENEWALS LEFT
CALL NO.
BRANCH
Book
4/7/2015
12291954001
Pluto : New Horizons for a lost horizon : astronomy, astrology, mythology
0 of 0
Saratoga Springs Public...

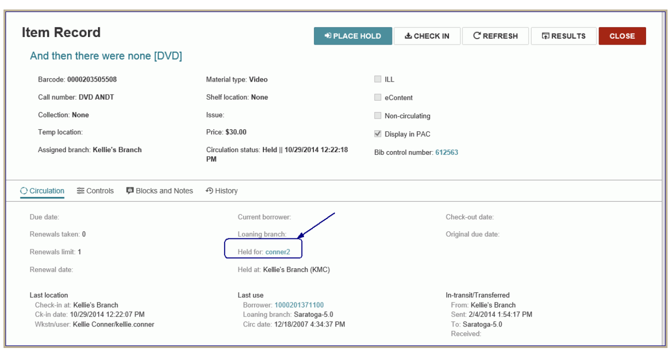
More Record Linking Options Added

The following links were added:

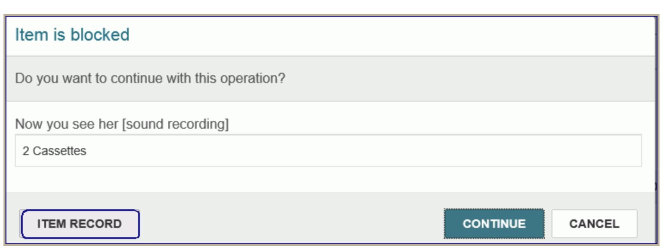
- **Item Record**
  - Link to the current or previous borrower by selecting the barcode link.



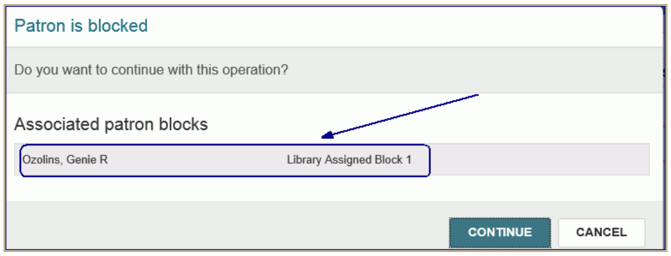
  - For held items, link to the patron for whom the item is being held.



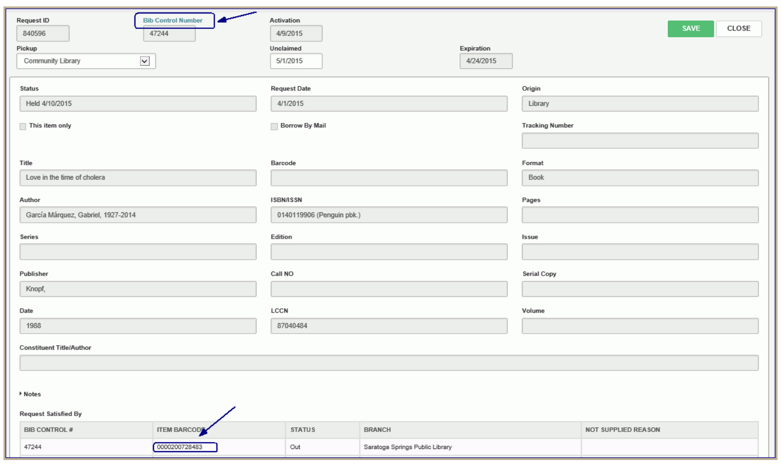
- **Item and Patron Block Message Boxes**
  - Link to the item record from the Item is blocked message box.



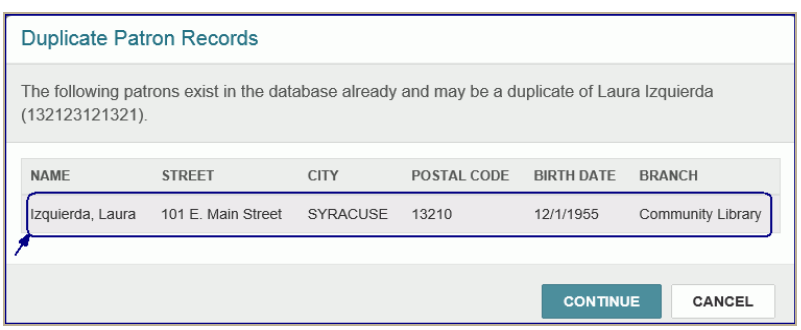
- Link to the patron record from the Patron is blocked message box.



- **Hold Request**
  - Link to Bibliographic Record by selecting Bib control number .
  - Link to the Item Record by selecting an item barcode in the Request Satisfied By list.



- **Duplicate Patron Registration Message Box**
  - Link to the existing Patron Record when you register a new patron and a possible duplicate patron is detected.



Leap Find Tool Updates

The following updates were made to the Leap Find Tool:

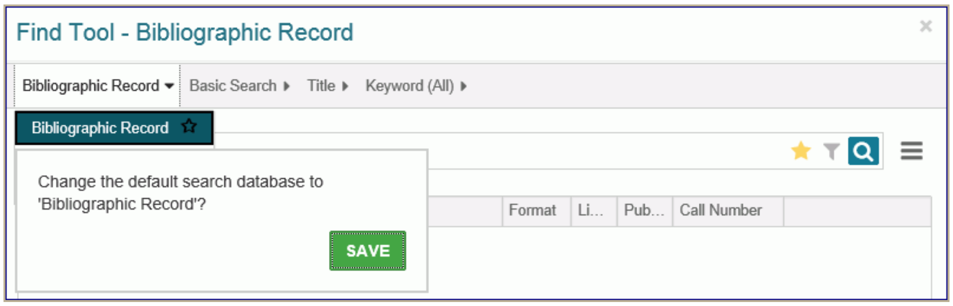
- A user default can be set for the search database (patron, item, or bibliographic record) - See "Find Tool User Default" on page 71.
- Browse searching was added - See "Find Tool Browse Search" on page 73.
- A count only option was added - See "Find Tool Count Only Option" on page 72.

Find Tool User Default

You can now set the Find Tool user default to search for an item, bibliographic, or patron record. Before this change, the Find Tool opened with patron record selected, and you had to open the Find Tool and change this selection to search for an item or bibliographic record.

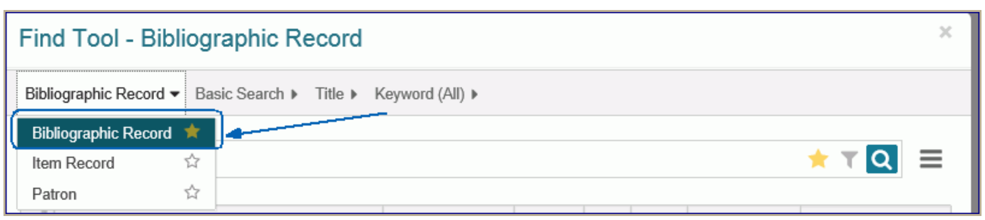
To set the default search database:

1. Open the Find Tool
2. Select **Patron Record** to open the search database list.
3. Select the star next to Bibliographic Record or Item Record to change the default search database.



4. Select **SAVE**.

   If you have selected a default search database, when you open the Find Tool from the main navigation toolbar link, a solid yellow star is displayed in the search database list next to the record type.



Find Tool Count Only Option

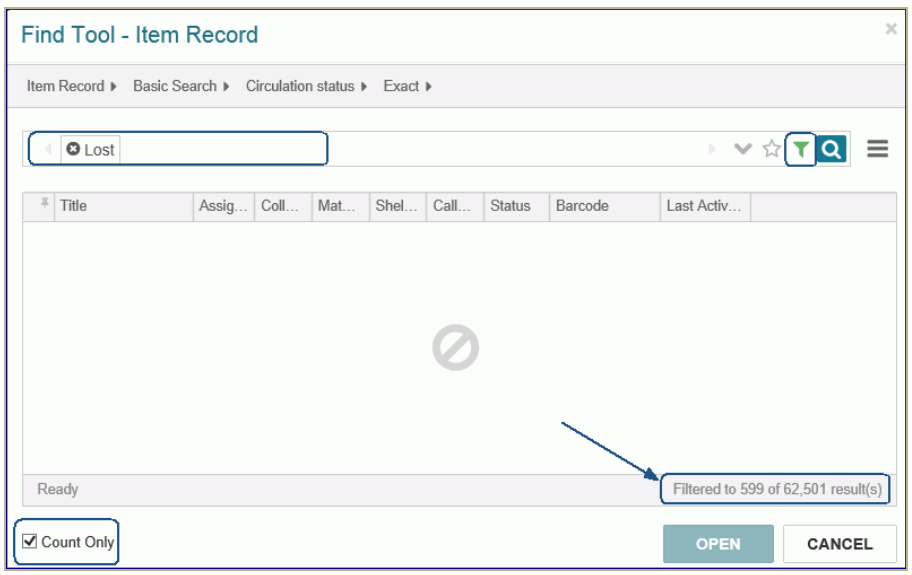
As with the Polaris staff client, you can now search for records in Leap and see a count of the records that meet the criteria you specified without returning search results in a list.

To see a count of records in the Find Tool without returning search results:

1. Open the Find Tool.
2. Type or select the search criteria, including any filters.
3. Select the **Count Only** check box, and select the search button.

   The count is returned in the bottom right corner of the page.

   Note:
   If a filter was applied, the results display both the filtered results and the basic search results.

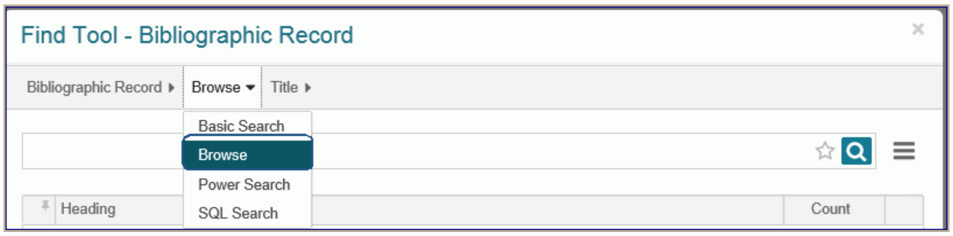


Find Tool Browse Search

When searching for bibliographic records in the Leap Find Tool, you can select **Browse** as the search type. For more information on Browse searching, see the Polaris staff client online Help.

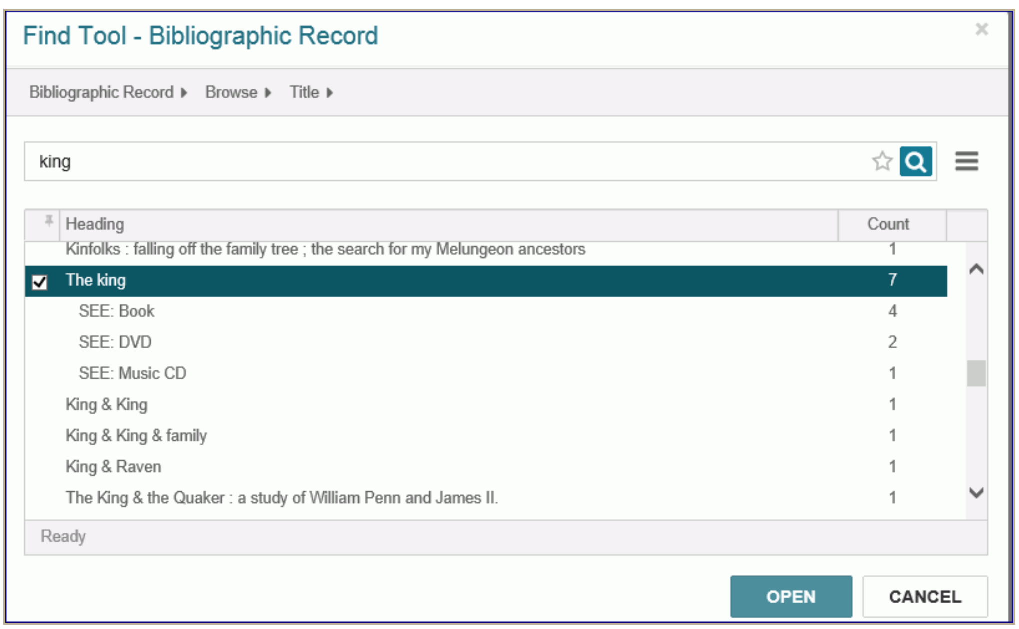
To browse search in the Leap Find Tool:

1. Open the Find Tool.
2. Select **Bibliographic Record**.
3. Select **Browse**.



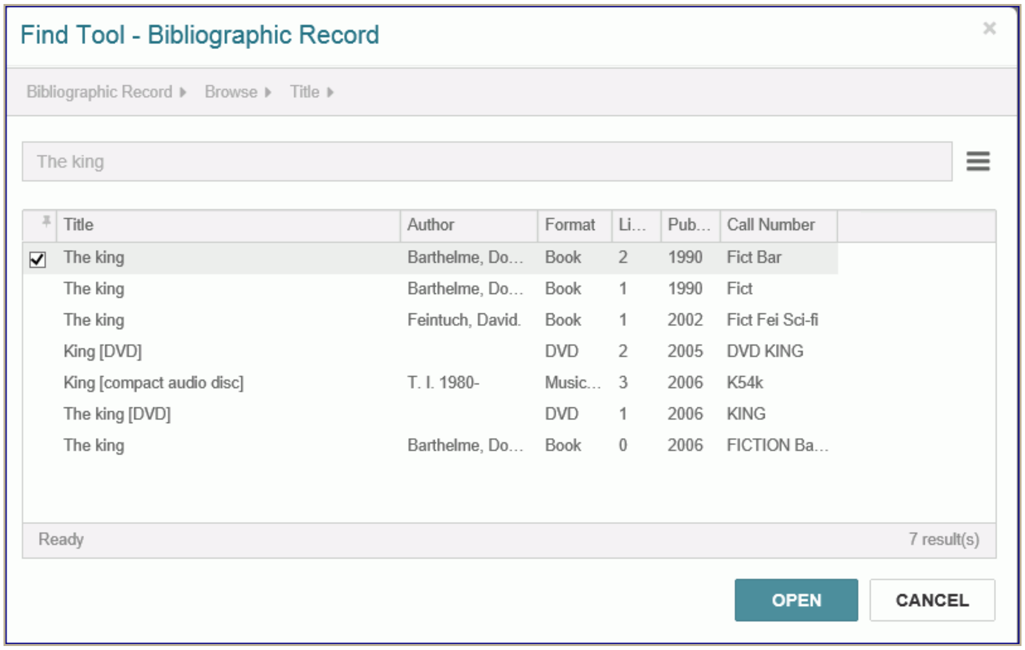
4. Select the search icon.

   The search results list displays the headings and counts.



5. Select a heading, and select **OPEN**.

   The results list displays the titles associated with the selected heading.


Find Tool - Bibliographic Record
Bibliographic Record
Browse
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Title
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Barthelme, Do...
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1990
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Barthelme, Do...
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1
1990
Fict
The king
Feintuch, David.
Book
1
2002
Fict Fei Sci-fi
King [DVD]
DVD
2
2005
DVD KING
King [compact audio disc]
T. I. 1980-
Music...
3
2006
K54k
The king [DVD]
DVD
1
2006
KING
The king
Barthelme, Do...
Book
0
2006
FICTION Ba...
Ready
7 result(s)
OPEN
CANCEL

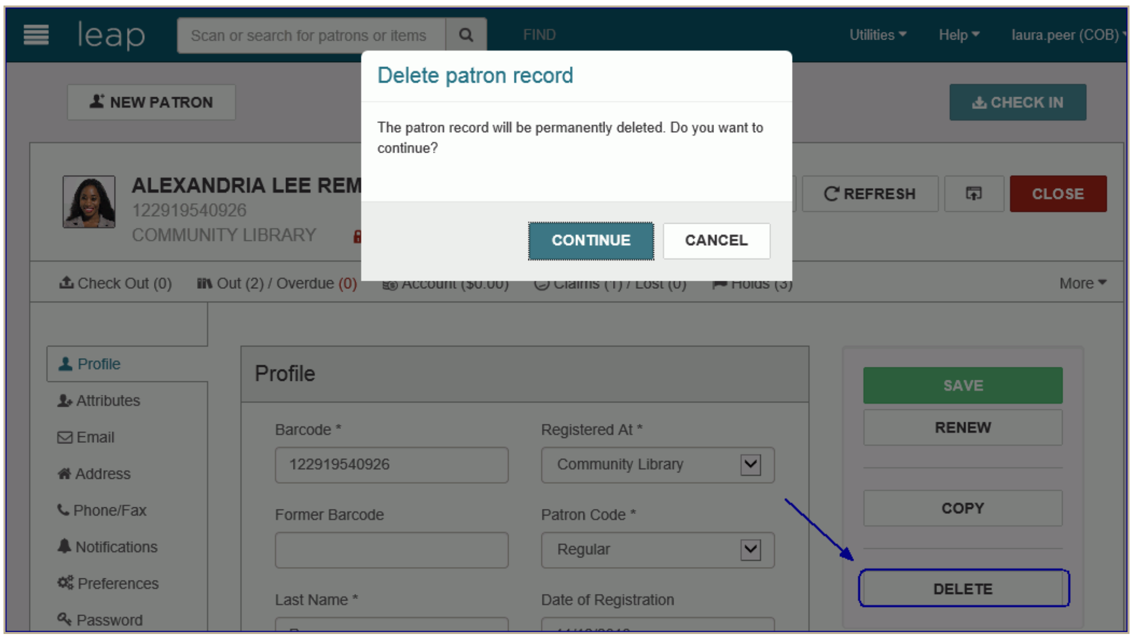
Delete a Patron Record

When a user attempts to delete a patron record in Leap, the same permissions and blocking conditions are checked as with the Polaris ILS. For information about the blocking conditions that prevent deletion of patron records, and the permissions required to delete patron records, see the Polaris ILS online Help.

To delete a patron record from Leap:

1. Open the patron record.
2. Select **DELETE**.

   A confirmation message appears.



3. Select **CONTINUE** to delete the patron record.

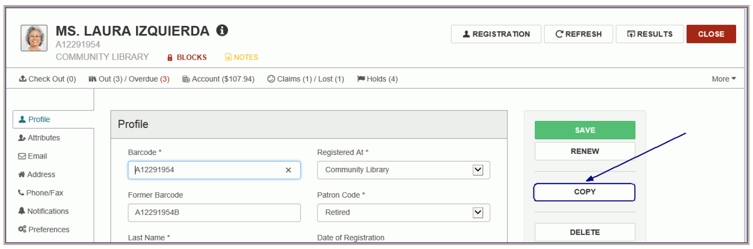
   If there are any conditions that prevent the patron record from being deleted, a message (or messages) is displayed.

Copy Patron Registration

You can now copy a patron's registration information when registering a new patron who has similar information, such as a family member.

To copy a patron's registration:

1. Open the patron record that you want to copy, and select **REGISTRATION** to go to the Registration page.
2. Select **COPY**.



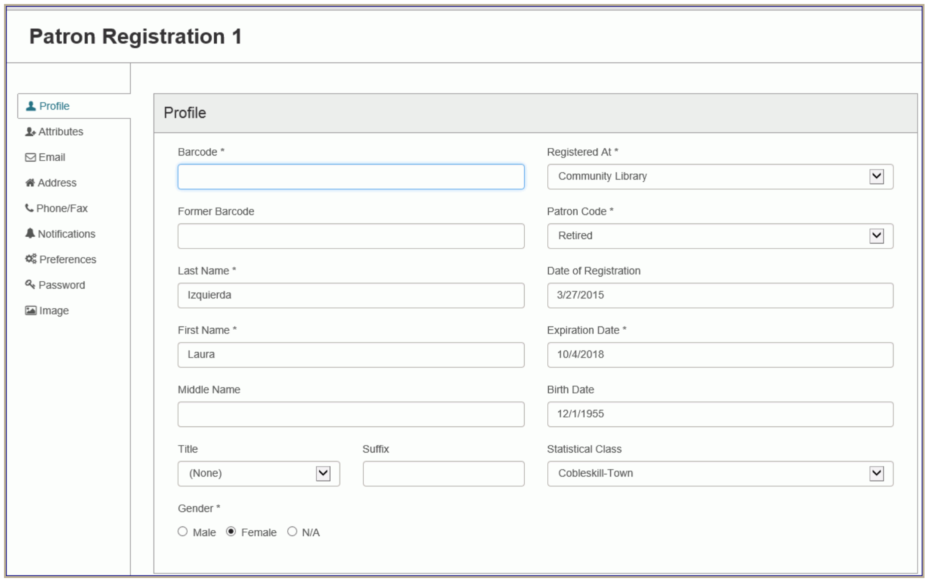
The patron record is copied and the Patron Registration page displays with the name **Patron Registration 1**. Many field values are copied to the new patron record. See "Field Values and Settings Retained in Copied Patron Registration" on page 76.

3. Enter the patron's name, barcode, and other information.
4. Select **SAVE** to save the new patron record.

Field Values and Settings Retained in Copied Patron Registration

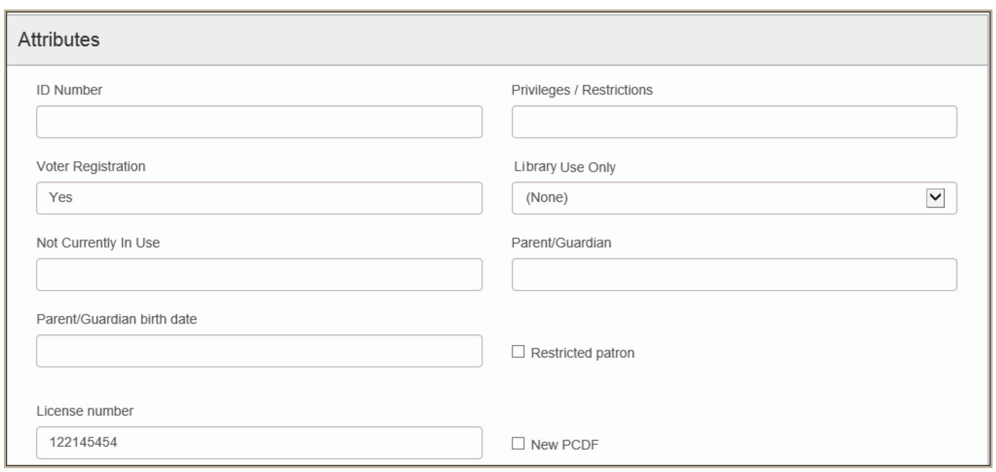
Profile view

- Last name
- First name
- Middle name
- Title
- Suffix
- Registered Branch
- Patron Code
- Expiration Date
- Birth Date
- Gender



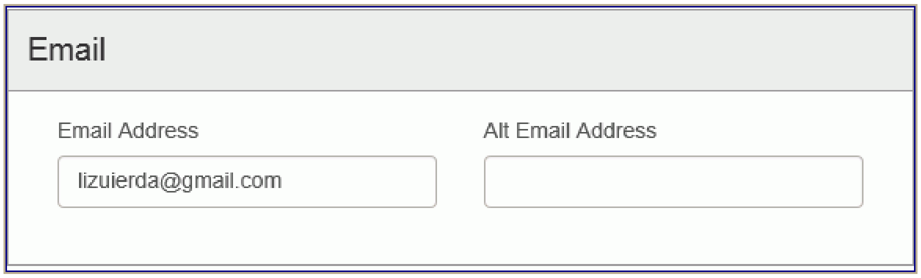
Attributes view

All field values are copied if defined: five user-defined fields (UDFs) and the patron custom data fields (PCDFs) the library uses.



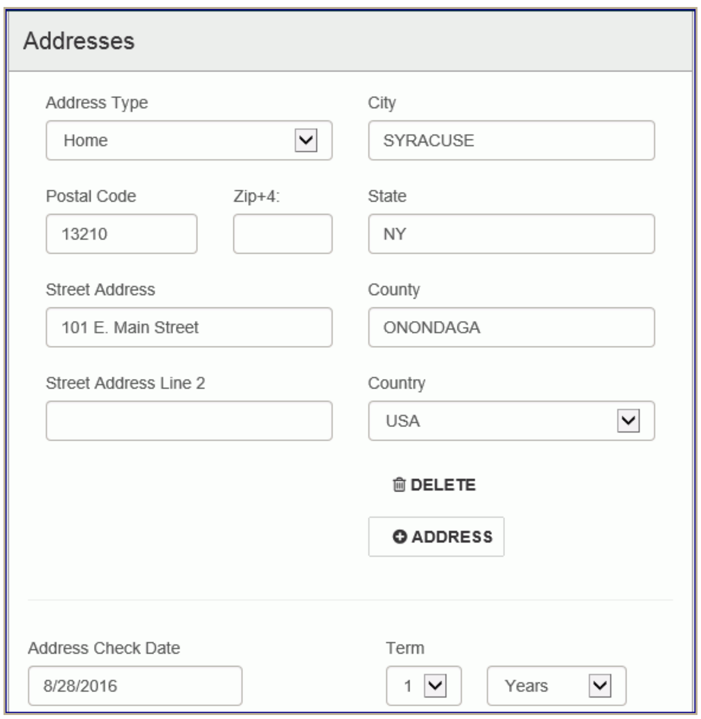
Email view

- Email Address
- Alt Email Address



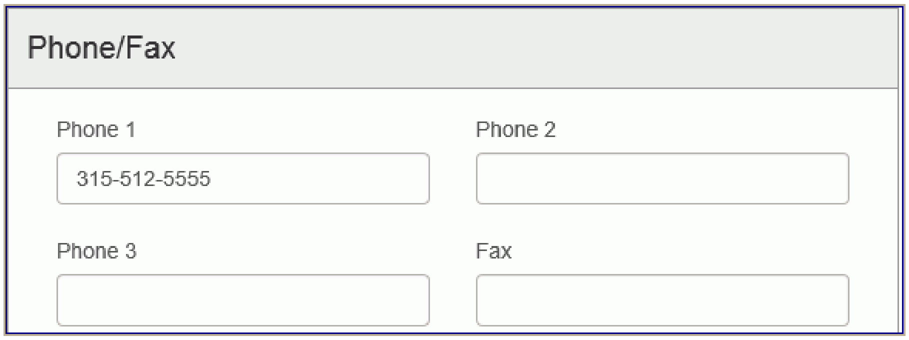
Addresses view

- All addresses
- Address Check Date



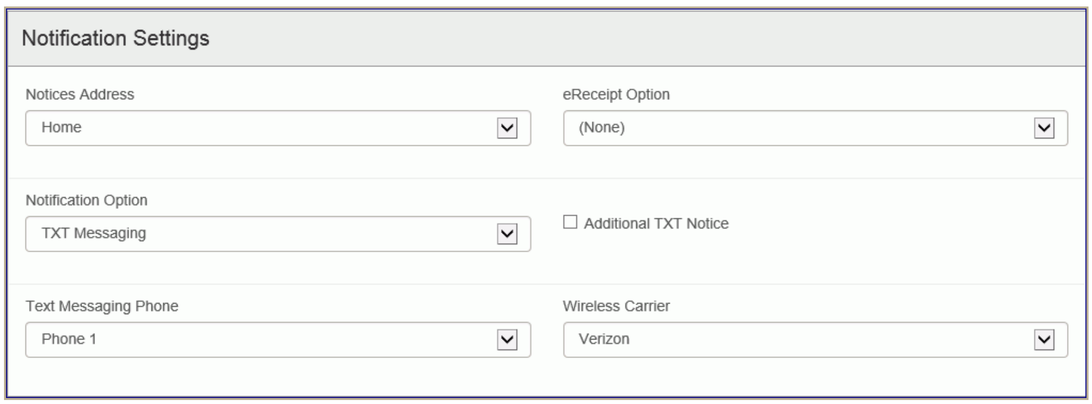
Phone/fax view

- Phone 1,2,3
- Fax



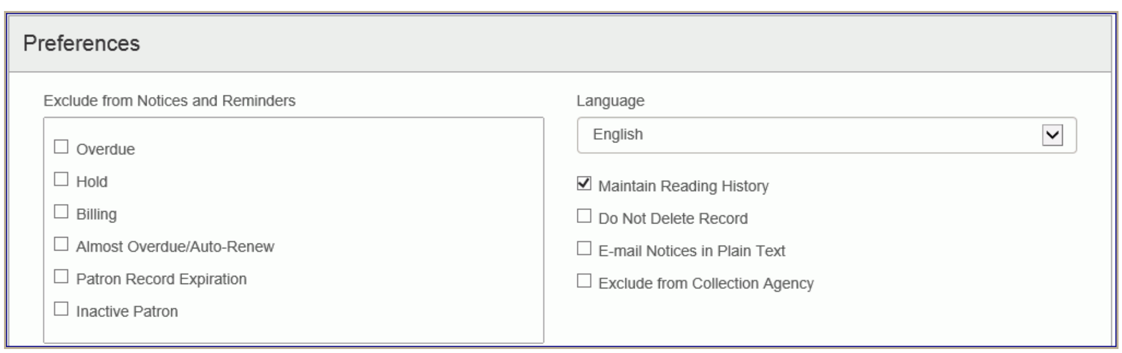
Notification Settings view

All field values and settings are copied.



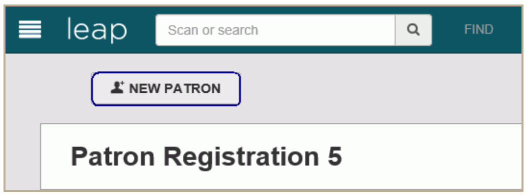
Preferences view

All field values and settings are copied.

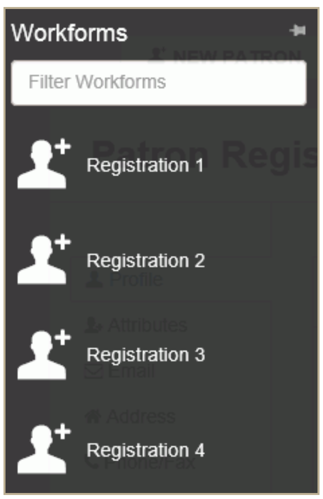


Multiple New Registration Pages Open Simultaneously

When you register new patrons in Leap, you can now have multiple Registration pages open at the same time. The first patron record created is named Patron Registration 1. As you add new patrons by selecting the **NEW PATRON** button, the number increases by one.



You can navigate among these new patron registration pages using the Workform tracker.

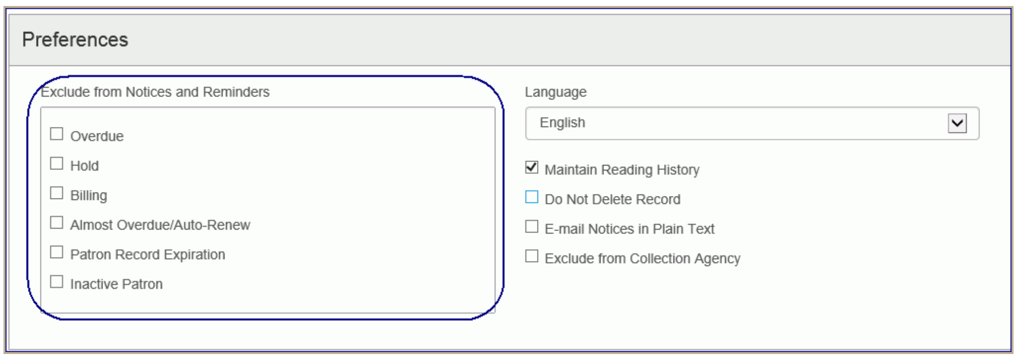


Opt Out of Notices Check Boxes Added to Patron Registration

> **Note:**
> The ability to set preferences for patrons to opt out of receiving certain types of reminder notices was recently implemented in the Polaris ILS, and this development makes these options available in Leap as well.

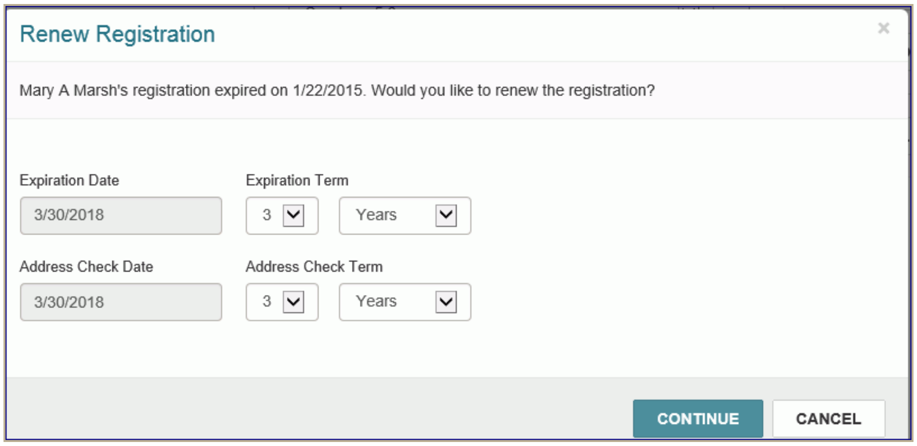
The Preferences view of the Patron Registration page now includes the following **Exclude from Notices and Reminders** check boxes that you can set for patrons who prefer to opt out of receiving certain types of reminder notices:

- **Almost Overdue/Auto-renew**
- **Patron Record Expiration**
- **Inactive Patron**



Update Patron Registration Renewal Dates

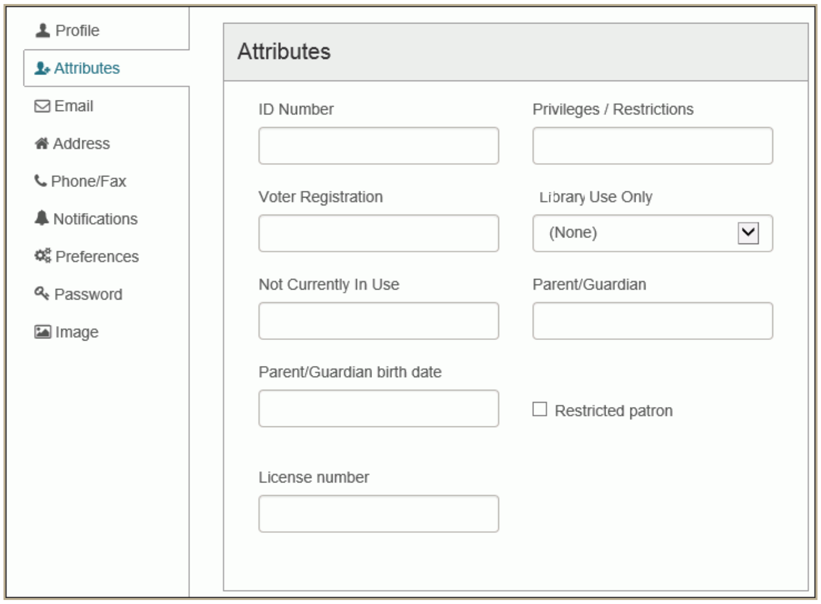
When you renew a patron's registration by selecting **RENEW** from a patron record Registration view, the Renew Registration dialog box opens where you can now update the address check date at the same time as the registration expiration date.



The default values that appear in the Renew Registration dialog box are from the Patron Services parameter for that patron's branch for Address check term.

Custom Data Fields Display in Patron Record

If a patron's record contains patron custom data fields, these fields are now displayed in the Patron Registration page, Attributes view.

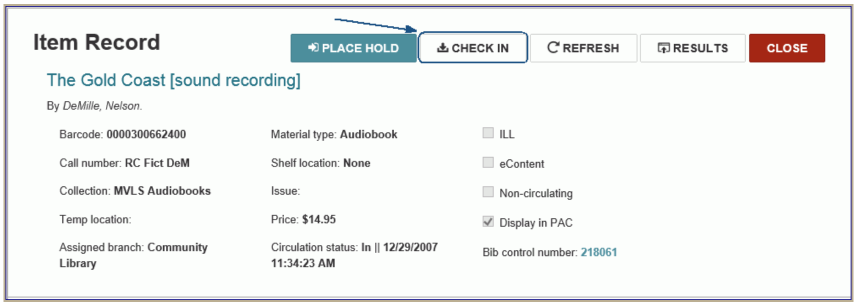


An asterisk is displayed next to any required fields. Default values will display if appropriate. You can also update patron custom data fields in Leap.For more information on custom data fields, see Polaris staff Help.

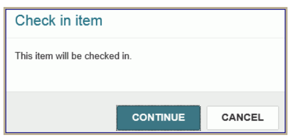
Check In From the Item Record

To check in an item directly from the Item Record:

1. Select the **CHECK-IN** button on the Item Record page to check in an item.



A message box is displayed.



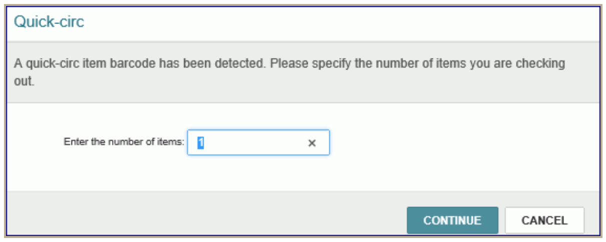
2. Select **CONTINUE** to continue checking in the item.

Note:
Checking in items in Leap uses the same processing, block checking, and permissions checking as in the Polaris staff client.

Circulate Quick Circ Items

Quick Circ items can now be checked out and checked in from Leap by scanning the barcode. Check out receipts are also printed for Quick Circ items.

When you scan a Quick Circ item barcode to check it out to a patron, a dialog box opens where you can enter the number of items.



Manage Charge for Check-outs/Renewals

If your library has enabled charging for checkouts and/or renewals in Polaris Administration, you can now manage these charges in Leap by paying, waiving, or charging the amount.

The permissions required to manage charges in Leap and the Polaris ILS are the same. For example, to manage fines in Leap, the **Fines: Pay fines at circ** and **Fines: Waive fines at circ** permissions are required.

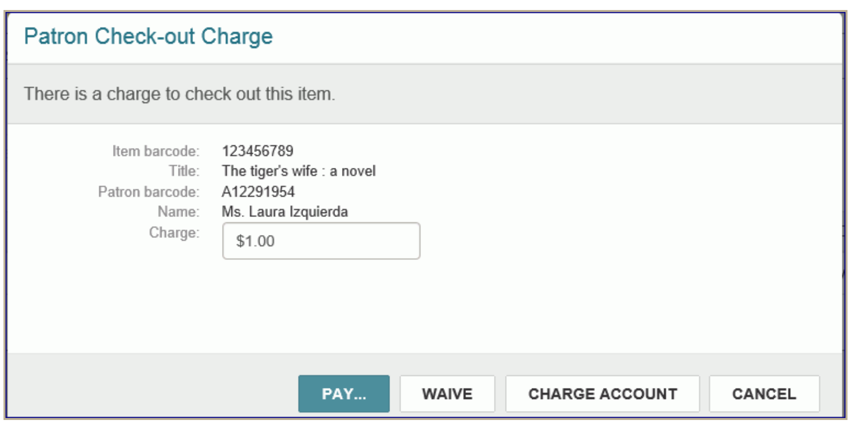
If configured in Polaris Administration, a prompt appears in Leap when a charge has been enabled for the item's assigned branch and that charge applies to: the action (check out or renewal); the item's material type; and the patron code. The charges for check-out and renewals are set for the item's assigned branch using the Check-out: Charge Options dialog box in Polaris Administration.

> **Note:**
> For more information on Polaris permissions and parameters, see the Polaris online Help.

To manage charges for check-outs and renewals in Leap:

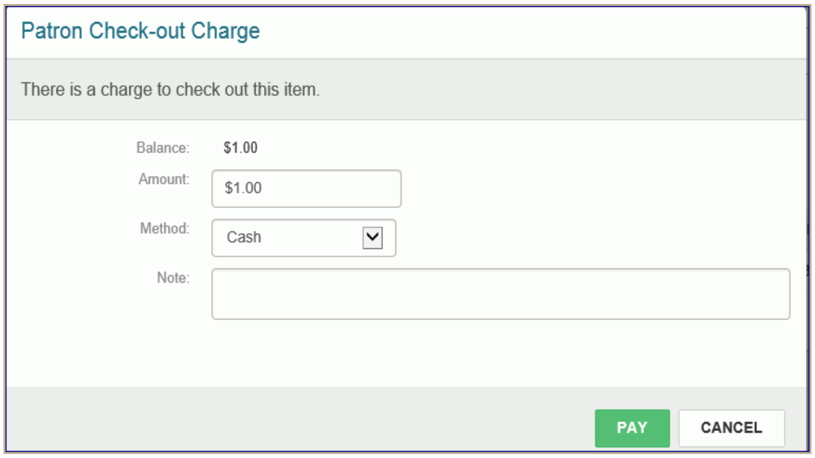
1. Check-out or renew an item for which a charge has been assigned for check-out-/renewal in Polaris Administration.

   The Patron Check-out Charge or Patron Renewal Charge dialog box opens where you can manage the charge.



2. If you want to change the amount that is paid, waived, or charged, modify the amount in the **Charge** box.
3. Select one of the following buttons:

- **PAY -** The area below the charge expands.



- If the amount paid is different than the amount charged, you can enter it in the **Amount** box.
- Select the payment method in the **Method** box.
- Select **PAY**. The amount is paid, and the item is checked out.

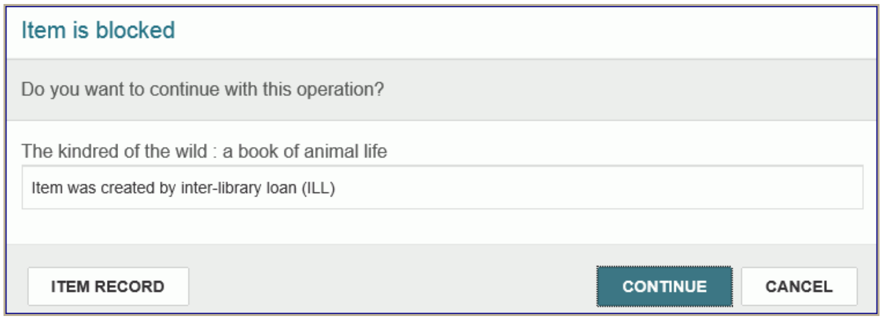
- **WAIVE -** The charge is waived and the item is checked out.
- **CHARGE ACCOUNT -** the charge is added to the patron's account, and the item is checked out.

Interlibrary Loan (ILL) Circulation

Note:
This feature is available in Leap only for ILL items created using ILL functionality in the Polaris staff client.

When you check out or check in an item that has the ILL box checked, the **Item is blocked** dialog box indicates the item is an ILL.Select **CONTINUE** to check out or check in the ILL item. The request updates the item record status. To complete the ILL transaction, use the ILL Request Manager in the Polaris staff client.

You can also select **ITEM RECORD** to open the ILL item from the dialog box.


Item is blocked
Do you want to continue with this operation?
The kindred of the wild : a book of animal life
Item was created by inter-library loan (ILL)
ITEM RECORD
CONTINUE
CANCEL

Updates to Patron Associations

The following Leap developments include updates to patron associations that were recently implemented in the Polaris ILS:

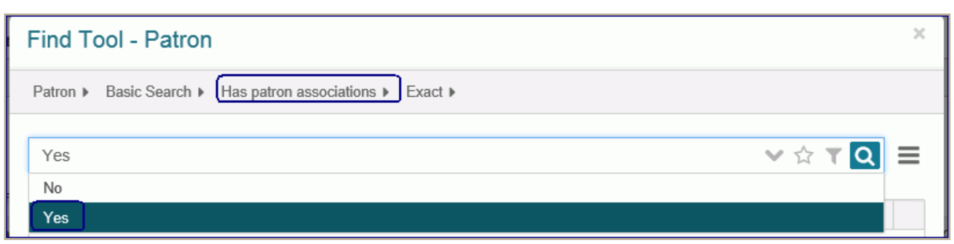
- Limit patron search results using a new **Has associations** filter. See "New Patron Find Tool Limit by Associations" on page 89.
- Allow (or disallow) a primary patron to pick up held items for their associated patrons.See"Updates to the Associations View in the Patron Record" on page 90.
- Add a new association and specify whether the primary patron can pick up and check out held items for that associated patron. See "Updates to Add Associations" on page 92.
- Edit an association and specify whether the primary patron can pick up and check out held items for that associated patron. See "Updates to Edit Associations" on page 93.
- Primary patrons who are allowed to pick up holds for their associated patrons can check out these items. The item record history and the hold request history indicate if an item was checked out by an associated patron. See "Check Out Items for Associated Patrons" on page 94.
- Link to an associated patron from the blocks message box or Blocks view of the patron record. See "Link to Associated Patron from Blocks Message and View" on page 90.

New Patron Find Tool Limit by Associations

You can now use the Patron Associations filter to limit search results to patrons who have (or do not have) associated patrons.

To use the patron associations filter:

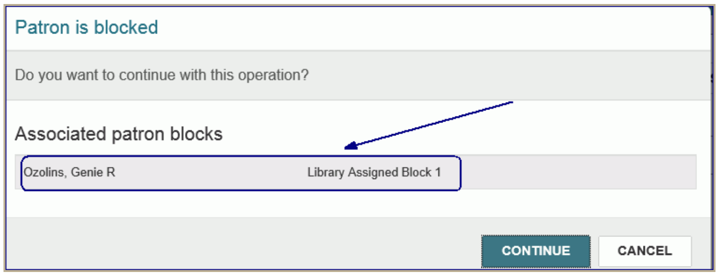
1. Open the Find Tool and select Patron.
2. Select the Qualifier to open the list, and select the **Has patron associations.**
3. Select **Yes** to find patrons with associations or **No** to find patrons that do not have associations.



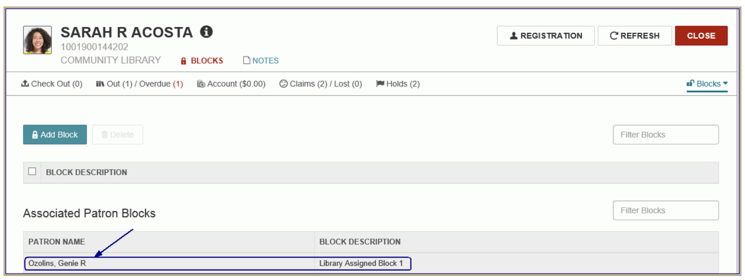
Link to Associated Patron from Blocks Message and View

When a patron is blocked because their associated patron is blocked, you can now link to the associated patron's record from the Patron is blocked message box and the Blocks view of the Patron Record.

- Link to the associated patron from the Patron is blocked message box.



- Link to the associated patron from the Blocks view of the patron record.

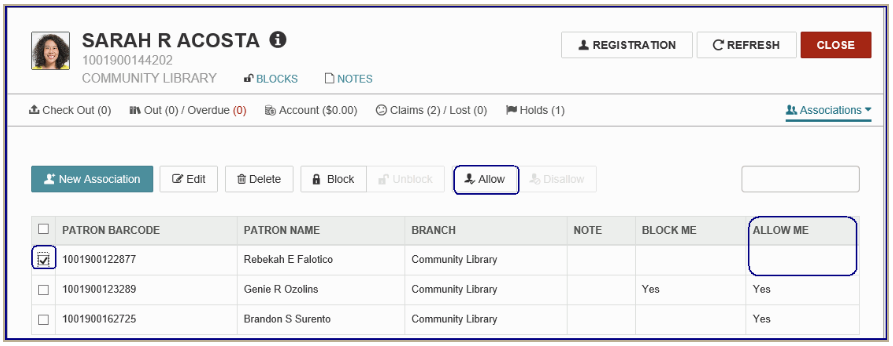


Updates to the Associations View in the Patron Record

The Associations view now includes **Allow** and **Disallow** buttons, which are used to allow or not allow patrons to pick up held items for their associated patrons. The **Allow** button is active when you select an associated patron, and the **Allow** column is set to **No** or blank. The **Disallow** button is active when you select an associated patron, and the **Allow** column is set to **Yes** or blank.

To allow a patron to pick up a held item for an associated patron:

1. Open the patron record, and go to the Associations view.
2. Select an associated patron for whom the **Allow** column is blank or has a **No**.
3. Select the **Allow** button.



A **Yes** is displayed in the **Allow Me** column for the selected patron, and the primary patron can pick up held items for that patron.

Updates to Add Associations

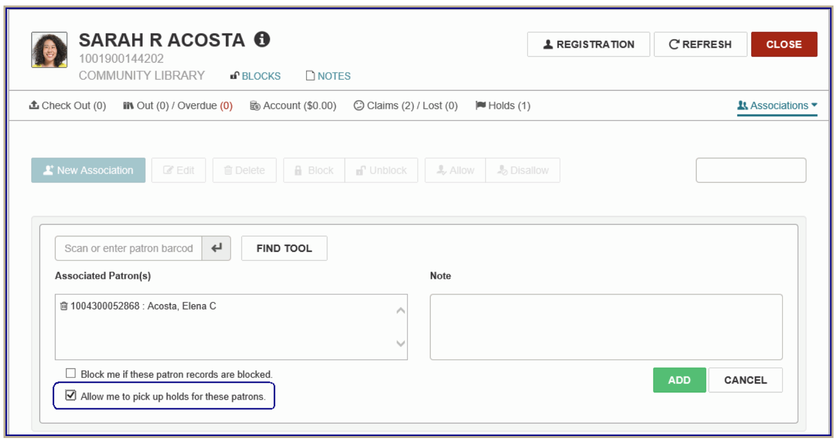
When you add a new associated patron in Leap, you can now select the option to allow the primary patron to pick up held items for the associated patron. You can also select multiple patrons to add if they will have the same settings.

> **Note:**
> The default setting for the **Allow me to pick up holds for these patrons** check box is determined by the Associated Patron Options parameter for the workstation's branch. For more information, see the Polaris ILS online Help.

To add an associated patron and allow the primary patron to pick up held items for the new associated patron:

1. Open the primary patron's record, and go to the Associations view.
2. Select the **New Association** button.

   The area below the **New Association** button expands.



3. Scan the new associated patron's barcode, or use the Find Tool to search for and select the patron. You can add multiple patrons at once if they will have the same settings.
4. Select the **Allow me to pick up holds for these patrons** check box.
5. Select **Add** to add the associated patron or patrons.

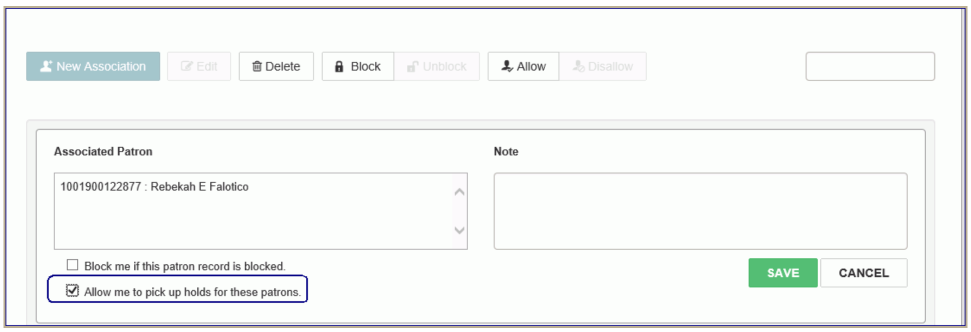
Updates to Edit Associations

When you edit a patron association patron in Leap, you can now select the option to allow the primary patron to pick up held items for the associated patron.

To edit an associated patron and allow the primary patron to pick up held items for the new associated patron:

1. Open the primary patron's record, and go to the Associations view.
2. Select the association you want to edit.
3. Select the **Edit** button.

   The area below the **Edit** button expands.



4. Select the **Allow me to pick up holds for these patrons** check box.
5. Select **Save**.

Check Out Items for Associated Patrons

If the primary patron is allowed to pick up held items for an associated patron, the primary patron can pick up and check out held items for the associated patron.

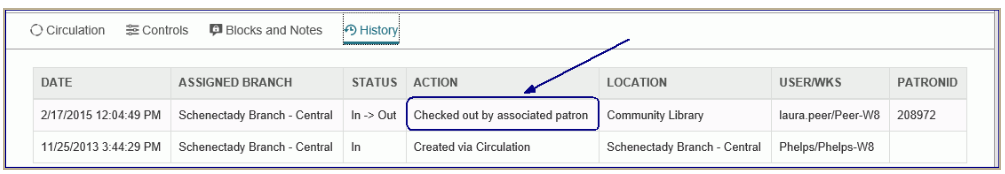
To check out items to a primary patron when the items are on hold for an associated patron:

> **Note:**
> The primary patron must be allowed to pick up held items for the associated patron.

1. Open the primary patron's record.
2. Select **CHECK OUT**.
3. Scan the held item's barcode.

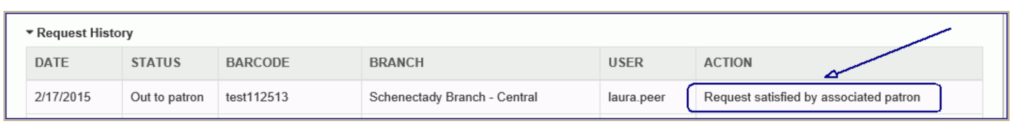
   The item is checked out to the primary patron and the history view is updated for the item and the hold request.

   In the **ACTION** column of the item record's history view, the text,**Checked out by associated patron**, is displayed.



DATE	ASSIGNED BRANCH	STATUS	ACTION	LOCATION	USER/WKS	PATRONID
2/17/2015 12:04:49 PM	Schenectady Branch - Central	In -> Out	Checked out by associated patron	Community Library	laura.peer/Peer-W8	208972
11/25/2013 3:44:29 PM	Schenectady Branch - Central	In	Created via Circulation	Schenectady Branch - Central	Phelps/Phelps-W8	

   In the **ACTION** column of the request history, **Request satisfied by associated patron**, is displayed.



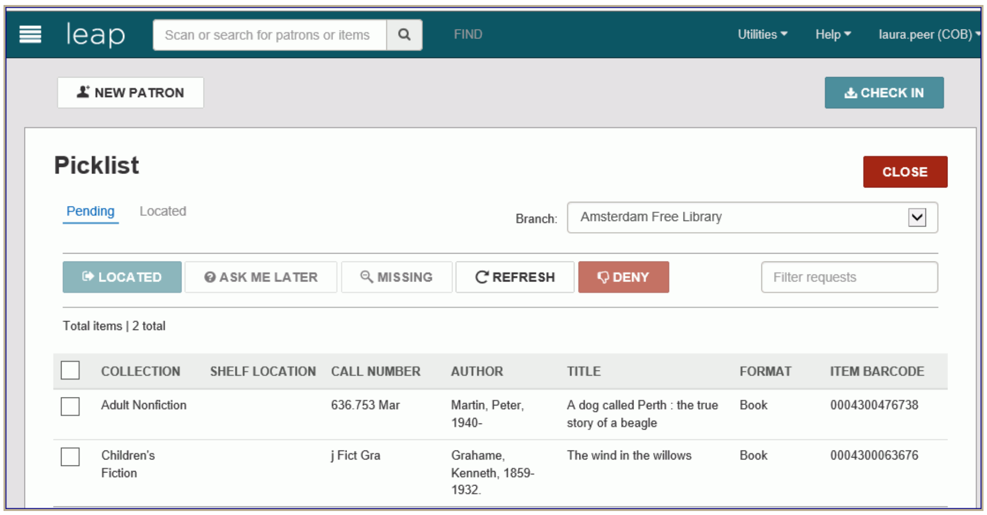
DATE	STATUS	BARCODE	BRANCH	USER	ACTION
2/17/2015	Out to patron	test112513	Schenectady Branch - Central	laura.peer	Request satisfied by associated patron

Picklist Changes

The following changes to the Leap Picklist are included in Leap SP1:

Note:
In addition to the Picklist Changes in Leap, a new Polaris permission, **Picklist application: Modify circulation status**. was added. Staff members who are granted this permission can change the circulation status of an item from the Picklist in Leap.

- The Picklist page was updated to look like other workforms in Leap. In addition, the **DENY** button now displays in red at the far right of the button bar, and the **CANCEL** button no longer appears on the Picklist page.



- If the Picklist is open, and you go to other Leap pages, you can return to the Picklist from the Workforms view.

- To facilitate mobile workflows, you can now select an item in the Picklist, and select the **MISSING** button to change the item's circulation status to **Missing**. This allows you to easily move items along to the next library in the routing sequence without having to track updates on paper and later go to the Polaris staff client to make the updates.

SimplyReports Updates

The following new columns and filters were added to SimplyRepots

Auto Renewal Columns

You can use new columns to generate reports that track activity related to auto-renewals. These columns are available on the Patron list and Patron count tabs.

Claim Missing Parts Filter

You can now use the filter report output for item and patron reports by the item circulation status, Claim Missing Parts.

Claim Missing Parts is included in the Item filters for the following reports:

- Item List and Count Reports - Item general filters, Circ status
- Patron Account List and Count Reports - Item filters, Circ status

Secured Patrons Filter

You can select the **Patron record is secured** check box under **Patron miscellaneous filters** to filter the report output for patron, item, or holds reports. This filter is available on the patron list and count; holds list and count; and item list and count tabs. When you select the **Patron record is secured** check box, the report output will be limited to data for patrons whose records are secured. For example, if you selected **Patron record is secured** for an item list report, the report output would include only those items that are linked to a secured patron.