What's New in Polaris 5.0 SP3 & Leap 1.0 SP3

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New and Modified Polaris Administration Settings **1**
3M Cloud Link Transaction Improvements **3**
EContent External Loan Status **4**
API Support for 3M Cloud **6**
Automated Offline Processing **7**
API Support for Title Lists in the Patron Account **11**
Polaris Leap Development **12**
Picklist Improvements 13
New Hold Request Workform 17
Item Statistics View 19
Check-In Receipts 20

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
Patron Services Parameters			
Offline (Automated): Client workstations: Continue on error	Specifies whether to continue or stop the automatic offline process if an error is encountered when pulling transactions from a workstation. If this parameter is set to **Yes**, the process continues even if it encounters a situation where the .TRN files cannot be pulled because the workstation is offline or the .TRN path is invalid.	Yes	System
Offline (Automated): Directory where offline TRN files are stored	Specifies the directory where the offline TRN files are gathered and stored.	C:/ProgramData/Polaris/5.0/OfflineTransaction	System
Offline (Automated): Enable automatic offline uploading	Enables automatic offline processing for the library system when the parameter is set to Yes.	No	System
Offline (Automated): Generate one upload log per branch	If the value is set to **Yes**, one upload log is generated per offline branch. If this parameter is set to **No**, a single log file is generated for all offline branches.	Yes	System
Offline (Automated): Polaris user for automatic upload process	Specifies the user assigned during the automatic upload processing. To specify a user, choose the user ID from the drop-down list of usernames.	PolarisSuperUser	System

Location / Name	Purpose	Default	Level
Offline (Automated): Send offline upload log report to email address	Specifies the email addresses of users who receive the log reports.	No default email address is specified.	System, Library, Branch

3M Cloud Link Transaction Improvements

Transaction processing has improved for 3M Cloud Link checkouts when they occur in the 3M app:

- When a Polaris patron uses the 3M app to check out a 3M Cloud Link title from another Polaris library in the same Polaris database, Polaris now correctly checks out a Polaris item record for the lending library, assigns the item a circulation status of Out, and performs all established integrated econtent checkout processing. The title appears on the patron's Items Out page in the PAC. Polaris also supports checking in those titles, either by patron action from the PAC patron account or automatically when the loan period expires.
- If the title is in the Polaris database, hold requests on 3M Cloud Link titles are displayed on the PAC patron account Requests page.
- If the hold request is satisfied by the patron's library, the patron can check out held titles from the PAC patron account, once they become available for checkout.
- Item record processing has improved in the situation where non-Polaris ("external") patrons use the 3M app to check out Cloud Link titles held by Polaris libraries. If a Polaris library lends a title to a patron that is not in the lending library's Polaris database, Polaris now assigns a circulation status of Econtent External Loan to the Polaris item record. (These actions are not processed as traditional checkouts in Polaris since the transaction cannot be associated with a patron.) Polaris also returns those item records to In status when the external patron checks in the title in the 3M app, or when the loan period expires.

EContent External Loan Status

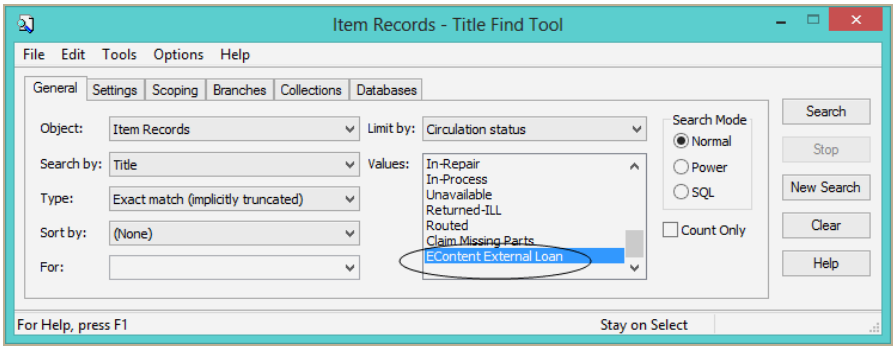
A new circulation status **eContent external loan** was added to support interlibrary loan features offered by eContent vendors. For the first part of the implementation, the new status is used only with 3M integrated eContent titles.

The new circulation status is used to update the eContent item record when a Polaris library loans an eContent title to a patron whose record is not in the Polaris database. If a Polaris library lends a title to a patron whose record is not in the lending library's Polaris database, Polaris assigns the circulation status **eContent external loan** to a Polaris item record for the lending library. (These actions are not processed as traditional checkouts in Polaris since there is no patron to associate the transaction with.) Polaris also returns those item records to **In** status when the external patron checks in the title in the 3M app, or when the loan period expires.

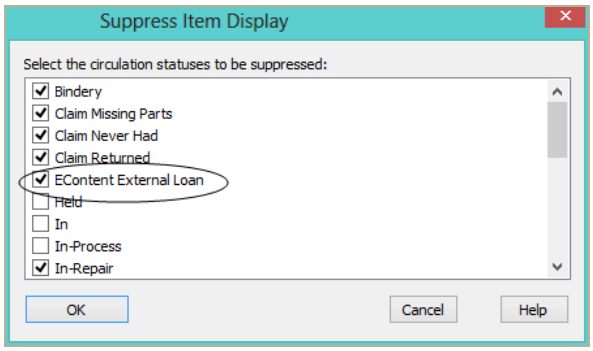
The check-outs and check-ins are always from the vendor's application. Only the APIs can apply the eContent external loan circulation status and only to integrated eContent items.

When Polaris or 3M API calls cause eContent item records to transition in and out of the eContent external loan circulation status, item record modifications are recorded using the existing **Item record modified (3009)** transaction and the new transaction subtype **Modified via eContent external loan (317)**.

The Polaris Find Tool includes a new eContent external loan value when **Limit by: Circulation status** is selected for item records.



Libraries can opt to display or suppress items with a circulation status of eContent external loan for certain branches in PowerPAC and Mobile PAC availability views. A new **EContent External Loan** check box was added to the **Suppress item display** PAC profile in Polaris Administration.



If the **Item Availability: Display detailed item status** PAC profile is set to **Yes**, the item status **eContent external loan** is displayed in PowerPAC and Mobile PAC Availability views. If this profile is set to **No**, the status **Not available** is displayed.

API Support for 3M Cloud

New Polaris API error messages were added:

- -3111 Invalid PatronVendorContractID for Checkout
- -3112 Error retrieving PatronVendorContractID for Checkout
- -3113 Invalid patron id/vendor account id for Checkout
- -3114 Error retrieving patron id/vendor account id for Checkout
- -3116 Invalid PatronVendorContractID for Checkin
- -3117 Error retrieving PatronVEndorContractID for Checkin
- -3118 Invalid patron id/patron vendor account id for Checkin
- -3119 Error retrieving patron id/patron vendor account id for Checkin

Automated Offline Processing

Important Notes:
Whether your library uses the current offline process or implements the new process, the PolPatron and PolSystem .mdb files must first be copied either manually or automatically from the server to the offline workstations. If you want to implement the new automated offline processing and automatically copy the .mdb files from the server to the workstations that will be used for offline circulation, you must set up the SQL Server credential and the proxy so that the SQL Agent can access and update the designated offline workstations. For more information, see "Managing Offline Circulation" in the Polaris Help.

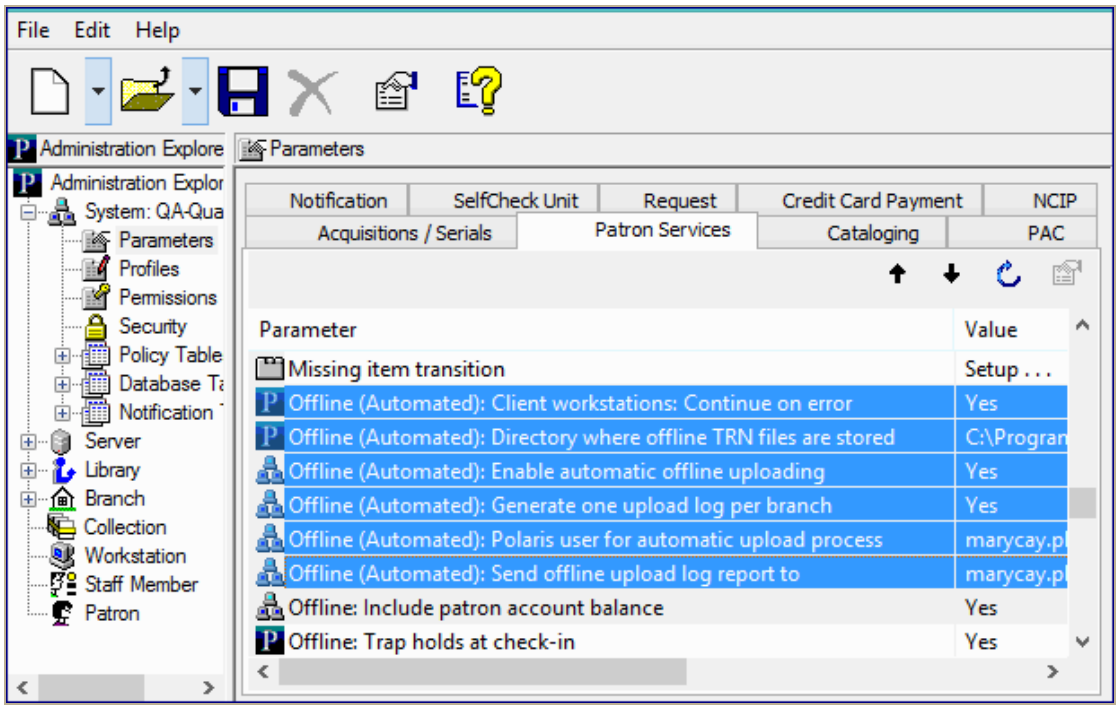
This new process automates the retrieval and upload of the offline files, but it does not affect how staff members work offline.

With automated offline processing, libraries can automatically retrieve offline files from library workstations and load them into the database without library staff intervention. When automated offline processing is enabled via a system-level parameter, all transactions (files with a .TRN extension) for patron registrations, check-ins, and check-outs are pulled from the staff workstations and stored on the server. The system reads the files, renames them with a .DON extension, sorts the transactions, and processes them. The results of the uploaded transactions are recorded in one or more log files. The library can specify whether to generate one upload log per offline branch or a single log file for all offline branches. Then, the library can email the logs to specified staff members.

Note:
You can continue to use the existing offline process if your library does not want to implement automated offline processing. The new automated upload functionality is disabled by default.

This development includes the following:

- New **Offline (Automated)** Patron Services Administration parameters:



  - **Offline (Automated): Client workstations: Continue on error** - This parameter, set at the System level only, is used to specify whether to continue or stop the automatic offline process if an error is encountered when pulling transactions from a workstation.The default setting is **Yes**. If this parameter is set to **Yes**, the process continues even if an error is encountered, such as the workstation is offline or the .TRN path is invalid, and the job cannot pick up the .TRN files
  - **Offline (Automated): Directory where offline TRN files are stored** - This parameter, set at the System level only, is used to specify the directory where the offline TRN files are gathered and stored on the **client** workstation. The default setting is: **C:\ProgramData\Polaris\5.0\OfflineTransaction**.

    Note:
    If your library chooses to use a network share, enter the path in this parameter. For example, **\\server\share**.
  - **Offline (Automated): Enable automatic offline uploading** - This parameter, set at the System level only, is used to enable automatic offline processing for the library system. The default value is **No**. If set to **Yes**, automatic offline processing is enabled for all branches.

- **Offline (Automated): Generate one upload log per branch** - This parameter, set at the System level only, is used for generating one or multiple log reports. If the value is set to **Yes** (the default), one upload log is generated per offline branch. If this parameter is set to **No**, a single log file is generated for all offline branches. Log files are saved to: **\\SERVER\c$\ProgramData\Polaris\<version>\Logs\Offline**.
- **Offline (Automated): Polaris user for automatic upload process** - This parameter, set at the System level only, specifies the user assigned during the automatic upload processing. The default setting is **PolarisSuperUser**. To specify a user, choose the user from the drop-down list of usernames.
- **Offline (Automated): Send offline upload log report to email address** - This parameter, which can be set at the System, Library, or Branch level, specifies the email addresses of users who receive the log reports. No email address is specified by default. (If the job runs and no email address has been entered at the branch, library, or system level, the logs will still be produced, but they will not be emailed.) You can enter one or multiple email addresses, not to exceed 255 characters total. If multiple email addresses are entered, they must be separated by semicolons.

- A new **Automatic Offline Circulation Upload Processing** SQL Job - To enable the job, the library sets the System-level **Offline (Automated): Enable automatic offline uploading** parameter to **Yes** and schedules the job (no default schedule is set), or runs the job manually. When the job runs, it checks the parameter, and if it is set to **No**, the job ends and no processing takes place. If the parameter is set to **Yes**, the job finds the TRN files that are stored on the workstations in the directory specified in the parameter **Offline (Automated): Directory where offline TRN files are stored**. It then pulls these files from the workstations into a centralized location on the server, uploads the transactions into the Polaris database, renames the .TRN files with a .DON extension, and logs the results of the upload.

  Note:
  If no .TRN files are found, the SQL job history includes the message:**There were no EXISTING TRN files to process.**

  Note:
  When calculating fines for uploaded check-in transactions, the system uses the number of days specified in the Patron Services Administration parameter **Free days (bulk)**.

- Updates to the offline log processing:
  - The library can choose to produce one log file for all offline branches or multiple log files, one for each offline branch.
  - Totals have been moved from the bottom to the top of the log.
  - The branch name displays in both types of log files (system or branch level logs).

- In each branch log, only one section displays with the branch name.
- In the system log, each branch name is listed as a separate section, with separate totals by branch, not for the whole file.
- The log files have a .log extension and are named with the system or branch organization abbreviation and a date/time stamp.
    - Example of a System-level log file name: **QA Quantum YYYYMMDDHHMMSS.log**
    - Example of a Branch-level log file name: **STI YYYYMMDDHHMMSS.log**

API Support for Title Lists in the Patron Account

Polaris API methods were added to support saved title lists in the patron account for Polaris libraries that use public access catalogs other than the Polaris PowerPAC or Polaris Mobile PAC. For more information, see the Polaris API Guide.

The following new Polaris API (PAPI) methods were added:

- **Add title list (PatronAccountCreateTitleList)** - This POST method creates a named title list on the patron account. List names must be in nvarchar format with a limit of 255 characters.The following characters are not supported in title list names and should not be passed in to PAPI: plus, backslash, quotation marks (double or single), pipe.
- **Delete title list (PatronAccountDeleteTitleList)** - This DELETE method deletes the specified existing named title list on the patron account.
- **Get list of lists (PatronAccountGetTitleLists)** - This GET method retrieves a list of all title lists in the patron account.
- **Add title to a list (PatronTitleListAddTitle)** - This POST method adds the specified bibliographic record to the specified list on the patron account.
- **Delete title from list (PatronTitleListDeleteTitle)** - This DELETE method deletes a single specified bibliographic record from the specified list in the patron account.
- **Get titles in a list (PatronTitleListGetTitles)** - This GET method retrieves a list of titles and bib control numbers for the bibliographic records in a specified title list. You can get the entire list or a range (for example, positions 5-10). For more bibliographic data, use the existing BibGet method.
- **Copy record (PatronTitleListCopyTitle)** - This POST method copies the specified bibliographic record to the specified titles list in the patron account.
- **Copy all records (PatronTitleListCopyAllTitles)** - This POST method copies all bibliographic records from one title list to another title list on the patron account.
- **Move record (PatronTitleListMoveTitle)** - This POST method moves the specified bibliographic record from one title list to another in the same patron account.
- **Remove all records (PatronTitleListDeleteAllTitles)** - This DELETE method removes all records from a specified list, but leaves the empty list in the patron account.

Polaris Leap Development

Polaris Leap development for 1.0 SP3 includes the following new and enhanced functions, views, and options:

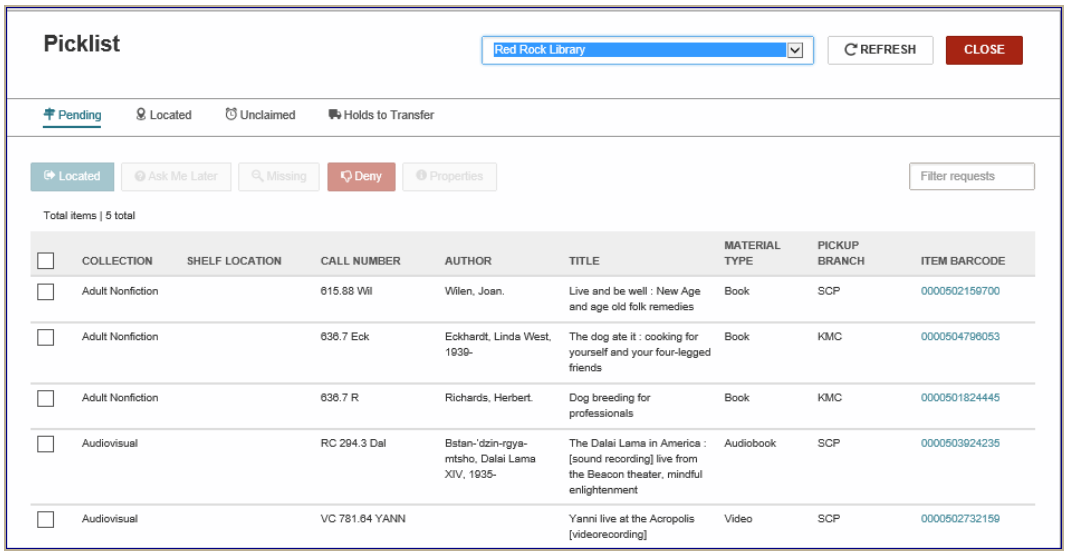
See:

- "New Hold Request Workform" on page 17.
- "Picklist Improvements" on page 13.
- " Item Statistics View" on page 19.
- "Check-In Receipts" on page 20.

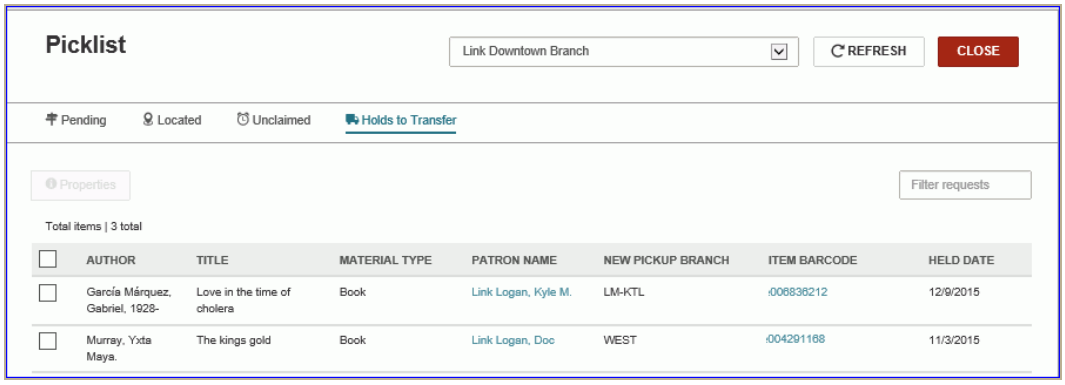
Picklist Improvements

The following improvements were made to the Picklist:

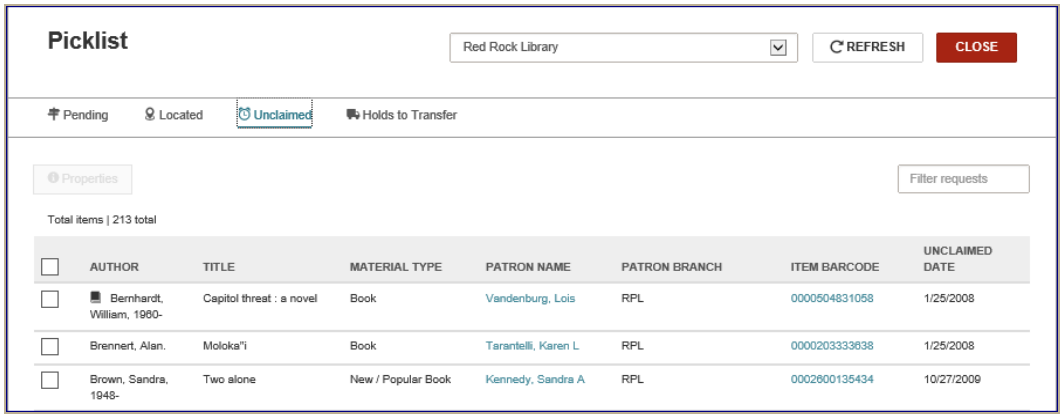
- The Picklist was updated to make it consistent with the other Leap workforms.
- The column was renamed **MATERIAL TYPE** for the material type in the item record, not the type of material (TOM) from the bibliographic record.



- You can select a barcode link in the **ITEM BARCODE** column to go to the item record. The Item Record workform has a new Statistics view where you can see the circulation statistics. See " Item Statistics View" on page 19.
- You can select a hold request in the Picklist to open it in the new Hold Request workform. See: "New Hold Request Workform" on page 17.
- The new **Holds to Transfer** view displays holds that need to be transferred to a new branch because the pickup location was changed.



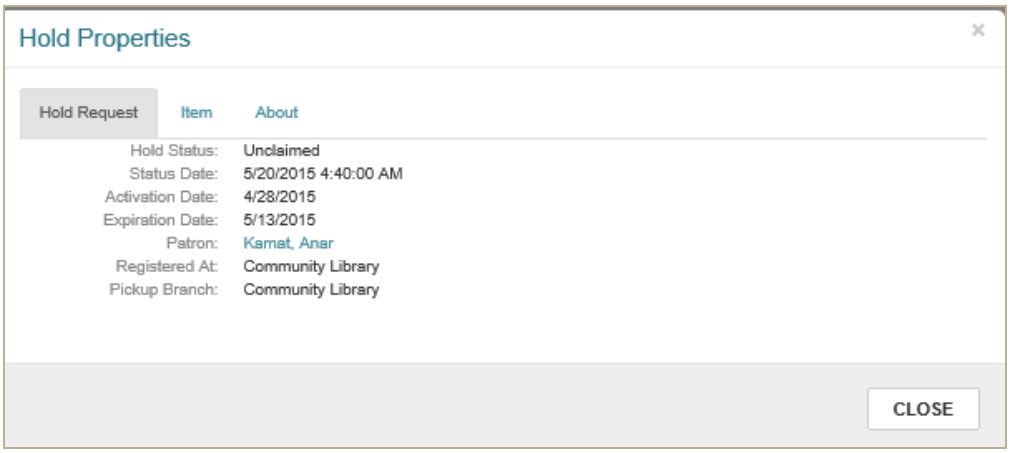
- The new **Unclaimed** view displays holds that still have not been picked up and the held until date has passed.



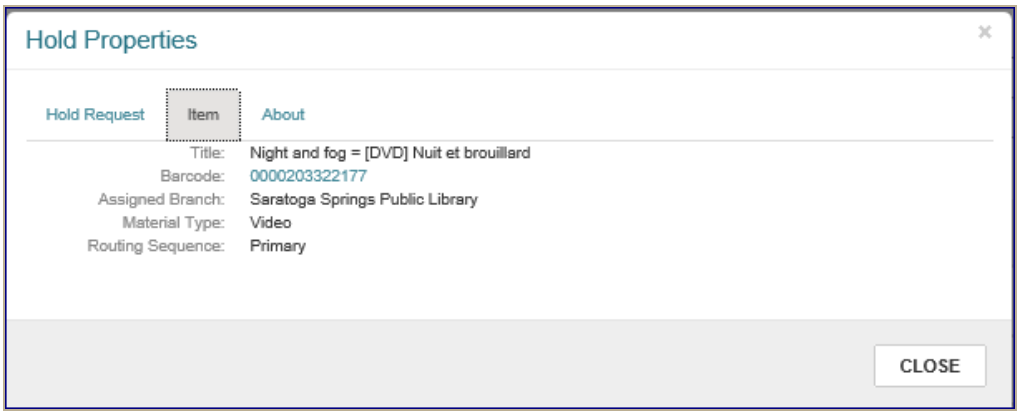
- From the **Unclaimed** and **Holds to Transfer** views, you can select the patron name to go to the patron record.
- A **Properties** button was added. When you choose a check box next to a hold request in the list, you can select the **Properties** button to open the Properties dialog box.

The Hold Properties dialog box displays the following information on the Hold Request, Item, and About tabbed views:

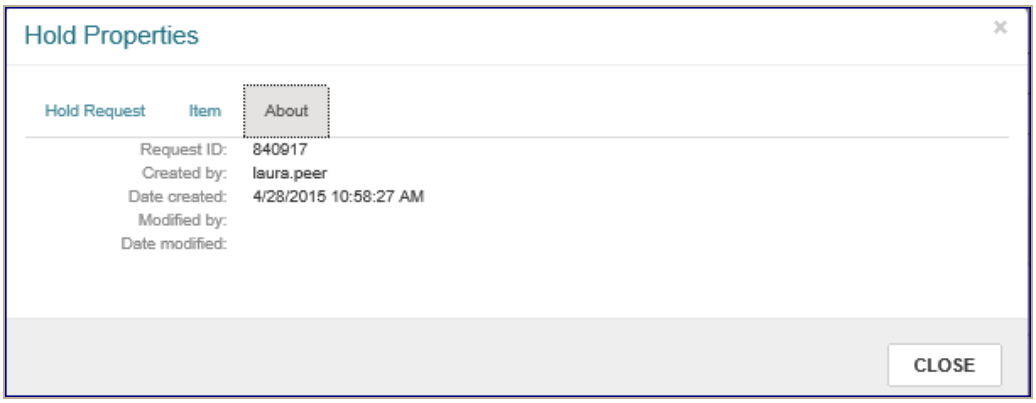
  - **Hold Request** view:
    - Hold Status
    - Status Date
    - Activation Date
    - Expiration Date
    - Patron - The patron name is a link to the patron record.
    - Registered At
    - Pickup Branch



- **Item** view:
  - Title
  - Barcode - The barcode is a link to the item record.
  - Assigned Branch
  - Material Type
  - Routing Sequence



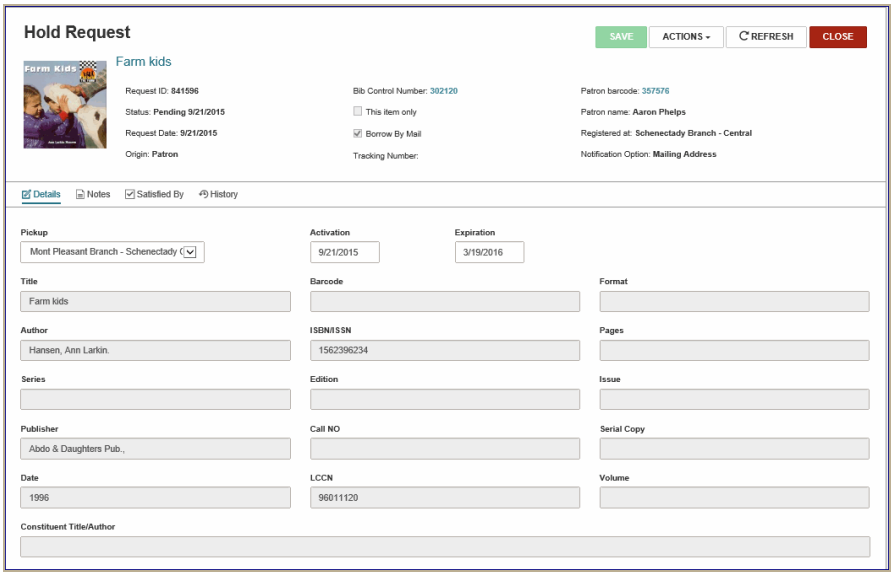
- **About** view:
  - Request ID
  - Created by
  - Date created
  - Modified by
  - Date modified


Hold Properties
Hold Request
Item
About
Request ID: 840917
Created by: laura.peer
Date created: 4/28/2015 10:58:27 AM
Modified by:
Date modified:
CLOSE

New Hold Request Workform

A new Hold Request workform was added to Leap. This new workform is only accessible by clicking on a hold request from the Picklist. This replaces the previous action which brought up a light box with details about the request.

When you first access the Hold Request workform, the **Details** view displays.



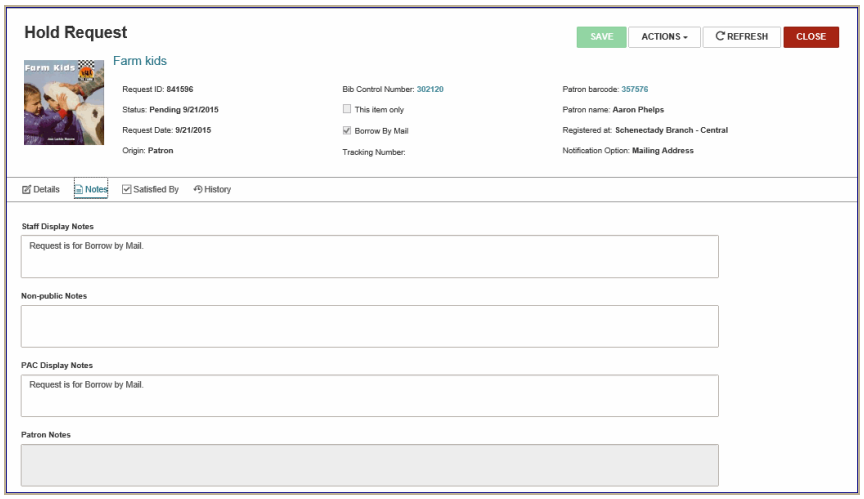
From the Hold Request workform, you can select the Bib Control Number to link to the bibliographic record, and the Patron barcode to link to the patron record.

To perform an action on the hold request, select **ACTIONS** and choose an action from the list:

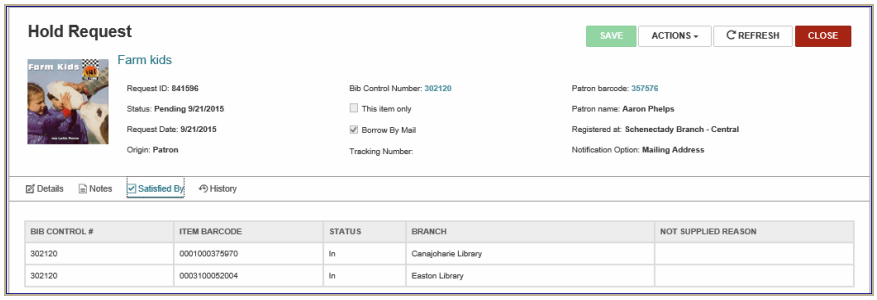
- **Cancel** - Cancels the hold request
- **Reactivate** - Reactivates the hold request
- **Delete** - Deletes the hold request
- **Fill Now** - Allows you to scan an item barcode to fill the hold request.

To see additional information about the hold request, choose the **Notes**, **Satisfied By**, or **History** tab.

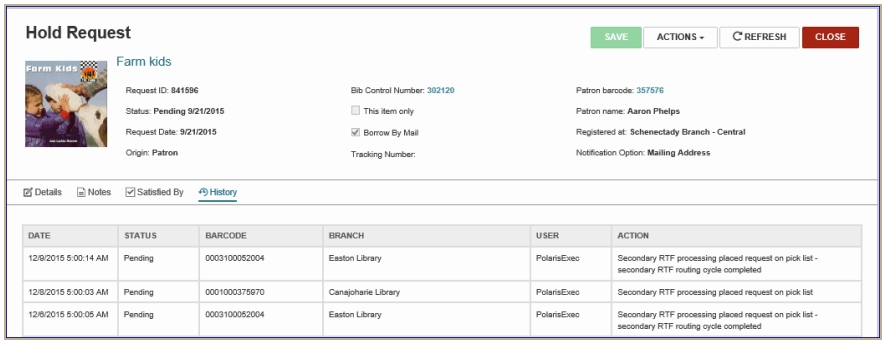
The Notes view displays any notes that may have been entered for a hold request. You can enter notes in the Staff Display Notes, Non-public Notes, and PAC Display Notes fields.



The **Satisfied By** view lists all the items that can fill the hold request. You can select an item in the list to open the Item Record workform.



The **History** view displays the history for this hold request.



Item Statistics View

The Item Record workform now has a Statistics view that displays the following circulation statistics for the item:

- Year-to-date circulation
- Previous year-to-date circulation
- Lifetime circulation
- Year-to-date in-house use
- Previous year-to-date in-house use
- Lifetime in-house use
- Inventory date

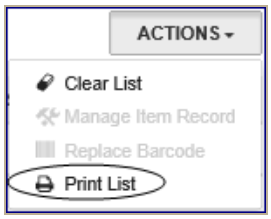
Check-In Receipts

You can now print check-in receipts when checking in items in normal or bulk mode. If multiple items for the same patron are selected, the receipt lists the selected items. If multiple items for multiple patrons are selected, the receipts are grouped by patron.

> **Note:**
> The receipt contents are determined by the Polaris System Administration settings for the workstation's branch.

To print check-in receipts:

1. Check the item or items in using Normal or Bulk mode.
2. Select the items for which you want to print a receipt.
3. Select **Actions | Print List.**



The Check-in receipts are printed.