What's New in Polaris and Leap 5.2

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World Headquarters
5850 Shell-mound Way
Emeryville, CA 94608
+1.510.655.6200

Eastern US - New York
103 Commerce Blvd., Suite A
Liverpool, NY 13088
+1.800.272.3414

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Polaris Installation Note

When the new Polaris release is installed on a workstation, the file path changes from Polaris Clients 5.1 to Polaris Clients 5.2.

Examples:
c:\ProgramData\Polaris\Polaris Clients 5.2
c:\Program Files\Polaris\Polaris Clients 5.2
c:\Program Files (x86)\Polaris\Polaris Clients 5.2

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
Profiles			
PowerPAC Profiles - Added			
Title List: Enable bulk holds	When set to Yes, logged-in patrons can select multiple titles from their working or saved title lists and place hold requests on all the selected titles at once. See "Bulk Hold Requests from Polaris PowerPAC" on page 12.	No	System, Library, Branch
Title list: maximum number of titles to request in bulk	Specifies the maximum number of titles that can be requested in a bulk hold request. See "Bulk Hold Requests from Polaris PowerPAC" on page 12.	10	System, Library, Branch
PowerPAC Profiles - Changed			
Dashboards: Narrow your search & Related searches	Availability dashboard element added. See "Availability and Assigned Branch Facets in PowerPAC Narrow Your Search" on page 21.	Not displayed	System, Library, Branch

Location / Name	Purpose	Default	Level
Title Display Configure	Requested date indicator for display to logged-in patrons on the PowerPAC search results page, the full display for a title, the working title list, and saved title lists. The system uses the setting for the connection organization. See "PAC Requested Titles Indicator" on page 20.	Not displayed	System, Library, Branch
Mobile PAC Profiles - Changed			
Title Display Configure	Requested date indicator for display to logged-in patrons on the search results page, the title screen, the working title list, and saved title lists. The system uses the setting for the connection organization. See "PAC Requested Titles Indicator" on page 20.	Not displayed	System, Library, Branch
Permissions			
INN-Reach administration: Access (replaces the existing Access INN-Reach Administration: Allow permission)	Provides read-only access to the INN-Reach Administration page. See "INN-Reach Administration Permissions" on page 35.	Staff who previously had the Access INN-Reach Administration: Allow permission will be granted this permission.	System
INN-Reach administration: Modify	In combination with the INN-Reach administration: Access permission, provides read-write access to the INN-Reach Administration page. See "INN-Reach Administration Permissions" on page 35.	This permission is not granted by default.	System

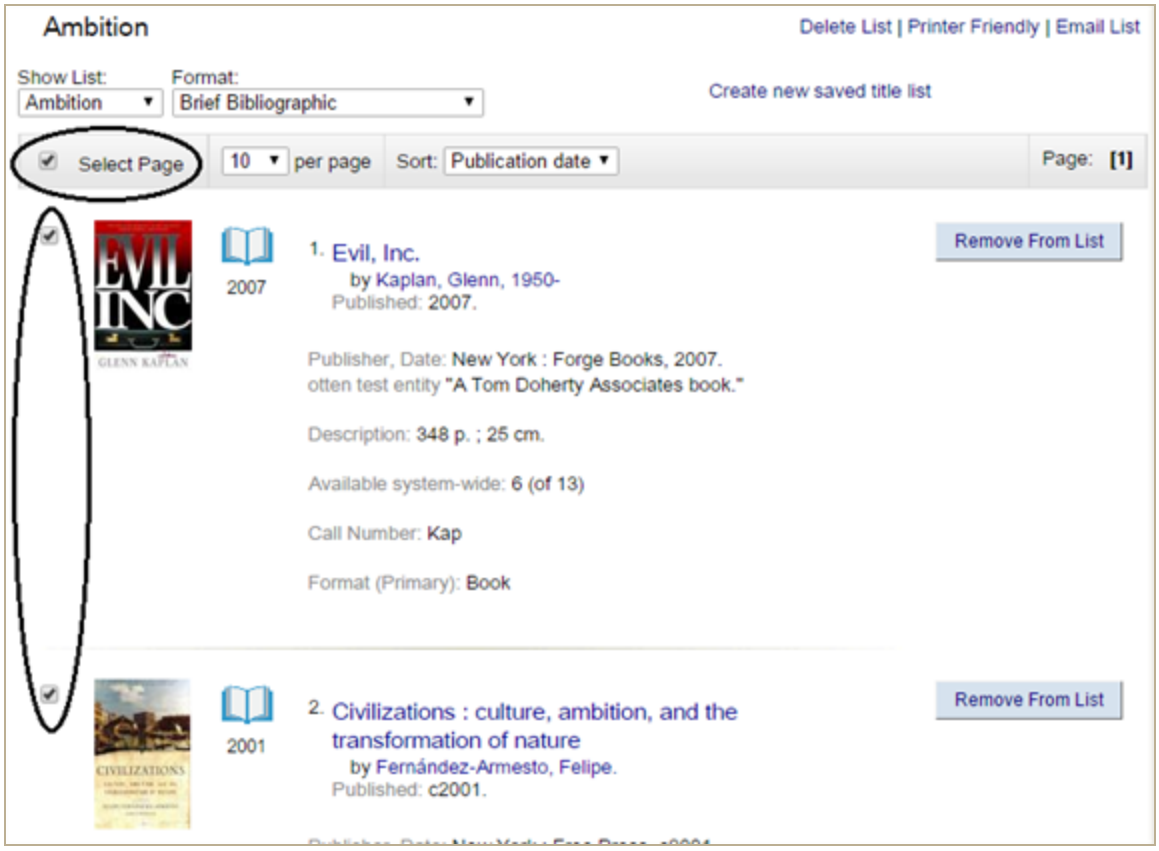
Location / Name	Purpose	Default	Level
Purchase Order: Change Fund, Destination, Collection	Allows editing of the material type, destination, collection, and fund for purchase order line items/segments on released purchase orders. See "Modify a Purchase Order After Release" on page 30.	This permission is not granted by default.	Branch
Picklist: Modify circulation status Existing permission updated.	Allows modification of item record circulation status from the Picklist view in Leap. See "Leap - Picklist Updates" on page 139.	This permission is not granted by default.	System, Library, Branch

PAC Title List Improvements

Working and saved title lists in both PowerPAC and Mobile PAC have been improved in several ways:

Selecting Multiple Titles

Patrons can easily select individual and multiple titles in working and saved lists. In Polaris PowerPAC, a check box appears next to each title in a logged-in patron's working or saved title list. The user can check single or multiple titles to place a hold request (see "Bulk Hold Requests from Polaris PowerPAC" on page 12) or take other actions (copy, move, or remove) on the selected title or titles. A **Select Page** check box is also added to the top of and bottom of the page in Polaris PowerPAC. When you select this check box, all titles on the current page are checked. These changes apply to the Brief Bibliographic, Full Bibliographic, Chicago Manual of Style, and APA views of the page. The example shows the Brief Bibliographic view in Polaris PowerPAC.



The **Copy**, **Move**, and **Delete** buttons have been moved to the bottom of the page, and renamed **Copy selected to**, **Move selected to**, and **Remove selected**. You can select

single or multiple titles and click the appropriate button to take the same action on all the selected titles. (If no titles are selected, the buttons are disabled.) In addition, a **Remove from list** control has been added to individual titles on working and saved title lists when displayed in Brief Bibliographic or Full Bibliographic format. You can click **Remove from list** to remove a single title without first selecting the check box.

> **Note:**
> If the user leaves the page and then returns to the page, all the check boxes revert back to the default state (unchecked).

The following WebAdmin strings have been added for the page elements:

- Select Page text: **PACML_SELECTALLCHECKBOX**
- Column headers: **PACML_SL_TITLEAUTHOR**, **PACML_SL_FORMAT**
- Remove control: **PACML_REMOVEFROMLIST** (PowerPAC) and **MP_REMOVEFROMLIST** (Mobile PAC)

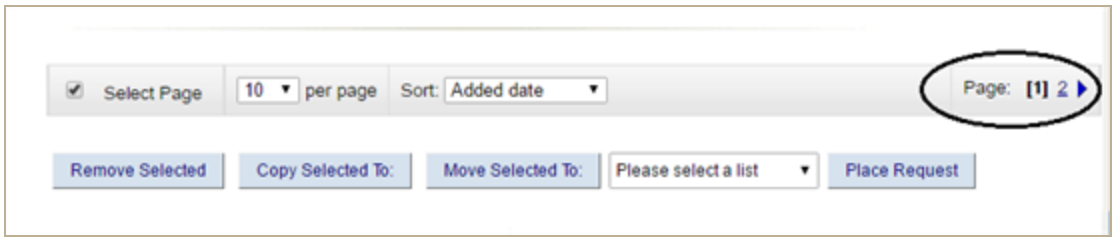
On a PowerPAC working title list, the default string for **PACML_TITLELIST_LBL_LOGIN2** is changed from **Log in to save titles to your account** to **Log in to place requests or save titles to your account**. If your library will not enable bulk holds (see "Bulk Hold Requests from Polaris PowerPAC" on page 12), you may want to edit this message. The bulk hold feature does not apply to Mobile PAC.

For information about editing string text, see the Polaris WebAdmin Tool online help.

Paging

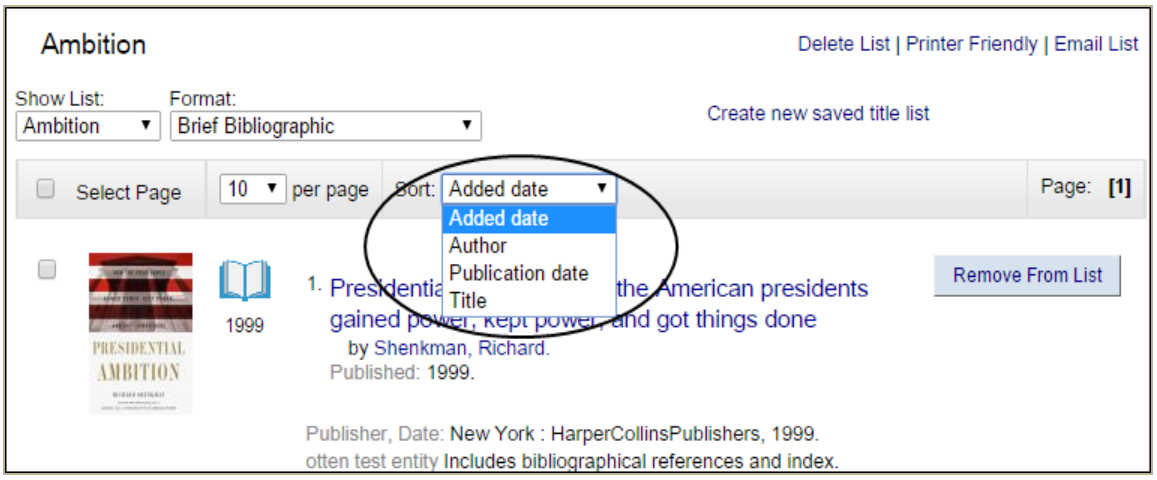
Paging has been added to PowerPAC title lists. You can opt to display 10 (the default), 20, 30, 50, or 100 titles per page from a drop-down control at the top of the list.

Paging controls are available at the top and bottom of multi-page lists.



Sorting

You can now sort the brief and full views of working and saved title lists by date added to list (the default), author, publication date, or title. When you select a new sort order, the entire list is sorted even if it extends to multiple pages; the page refreshes and you return to the first page of the list. The selected sort order is retained in the output file when you select print, email list, or save to disk.



If you select the Chicago Manual of Style or APA format, the list is sorted according to the rules of those style guides, and that order is retained in the output file for print, email, or save to disk. If you switch back to the brief or full view, the sorting order is the one most recently selected for those views.

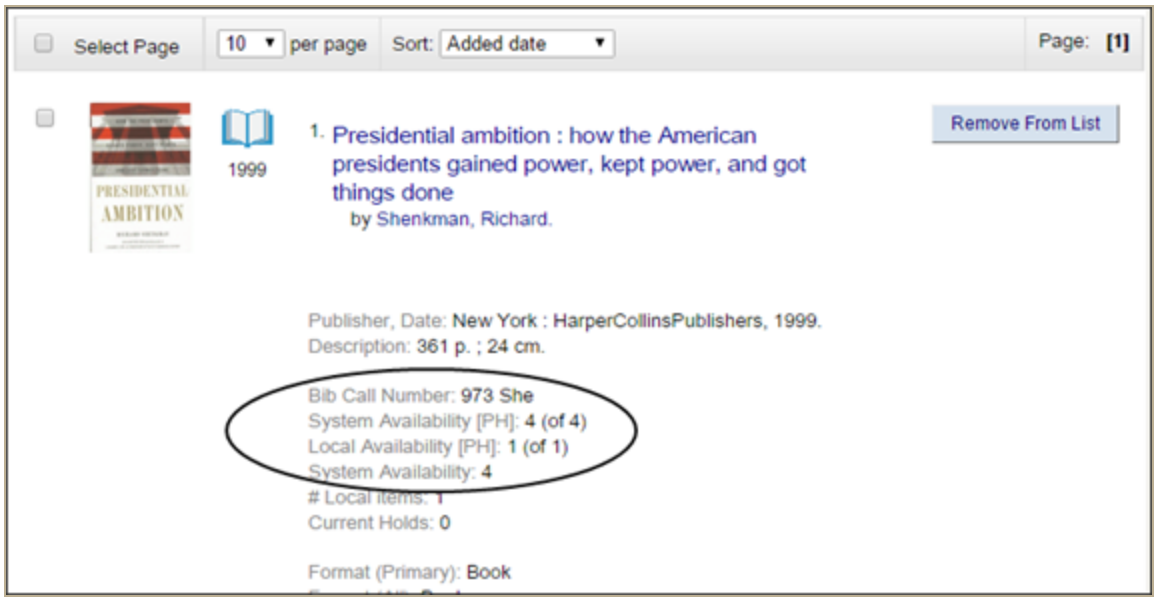
When a logged-in patron selects a sort order in a saved title list, the sort order is retained the next time the patron logs in, and any titles added to the saved list are correctly sorted for that list.

Availability Information Updated in Real Time

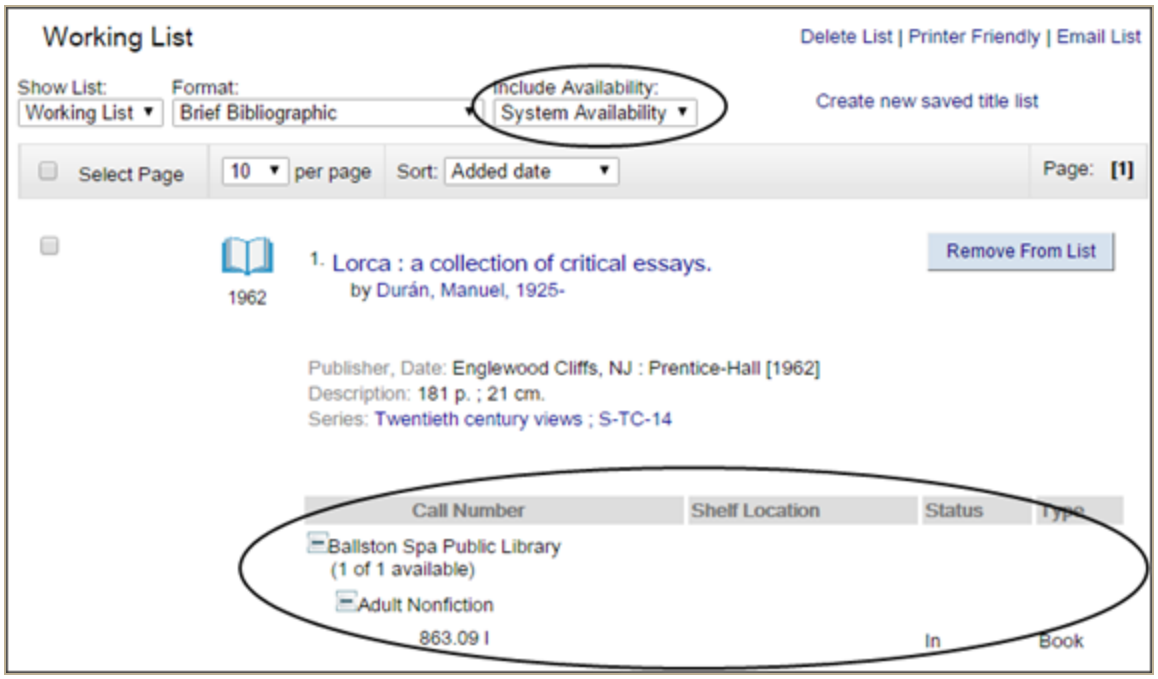
Availability counts and availability details on working and saved title lists are now automatically updated to reflect real-time data whenever the user displays the list. Previously, availability information was captured when a title was first saved to a list but was not subsequently updated.

> **Note:**
> As in previous versions of Polaris, availability details are displayed only on the working list.

When availability counts on the brief and full displays for the connected branch are set to display (PowerPAC profile - **Title Display: Configure**), the counts on working and saved title lists reflect real-time data when the patron displays the title list page. The counts are refreshed when the patron takes any action that refreshes the page; for example, leaving the page and returning; paging through a multi-page list; changing the sort order; changing the list format.



When availability details on the brief and full displays for the connected branch are set to display (PowerPAC profile - **Title Display: Configure**), the working list displays the details when the patron selects **Local Availability** or **System Availability** from the **Include Availability** drop-down list.



Availability details are also updated in real time when the patron takes any action that refreshes the page.

Bib Data Updated in Saved Title Lists

When a bibliographic record is changed, the change is now automatically reflected in any saved titles lists where the record appears. (This feature does not apply to titles that are not in the local Polaris database.)

Printing and Emailing Title Lists

When you click **Printer Friendly** or **Email List** on a working or saved title list, titles from the current page only are displayed in the printer-friendly view. You can click **Print Page**, **Save Page to Disk**, or **Email Page to** to take action on the current page, or click the new option **Email all to**, which emails the entire list to the designated address.

The following default WebAdmin strings identify the changed print, save, and email options, and the new **Email all** option:

- Print Page button: **PACML_TITLELIST_LINK_PRINT**
- Save Page to Disk button: **PACML_TITLELIST_LINK_SAVE**
- Email Page to button: **PACML_TITLELIST_BTN_EMAIL_TO**
- Email All to button: **PACML_TITLELIST_EMAILALL_TO**

Very long emails may exceed system or email service limits that prevent successful delivery. The system displays an alert message for large lists: "System limits or email service limits may prevent successful delivery of very long emails. If your email fails, return to the title list and select a different display format, or select fewer titles." You can edit the message in WebAdmin. The PowerPAC string mnemonic is **PACML_TITLELIST_EMAILALL_LISTSIZE_ERROR**; the Mobile PAC string mnemonic is **MP_TITLELIST_EMAILALL_LISTSIZE_ERROR**.

The user can click **OK** to close the alert message and send the email, or **Cancel** to return to the title list without send the email.

For information about editing string text, see the Polaris WebAdmin Tool online help.

Displaying a Requested Indicator

The library can choose to display a **Requested date** indicator in titles lists and search results for titles on which the logged-in patron has an active, pending, held, shipped, or located hold request. See "PAC Requested Titles Indicator" on page 20.

Record Limits Changed

The 1000-record limit for saved title lists has been removed.

Working title lists are now limited to 100 titles. If the patron clicks **Add to My List** in this case, the system displays a message: "The working list has reached the maximum number of titles allowed. To make a larger list, please make a saved title list." You can edit the message in Polaris WebAdmin. The PowerPAC string mnemonic is **PACML_TITLELIST_LIMIT_WORKINGLIST**; the Mobile PAC string mnemonic is **MP_TITLELIST_LIMIT_WORKINGLIST**.

Bulk Hold Requests from Polaris PowerPAC

Logged-in patrons can now select multiple titles from their working or saved title lists in Polaris PowerPAC and place hold requests on all the selected titles at once.

> **Note:**
> For more information about multi-selecting titles in title lists, see "PAC Title List Improvements" on page 5. A new **Requested date** indicator is also available to let patrons know which titles they have already requested in a title list or set of search results. See "PAC Requested Titles Indicator" on page 20.

The bulk holds feature is not available in these cases:

- Titles from remote databases listed in the title list cannot be requested through bulk holds.
- Integrated econtent titles cannot be cannot be requested through bulk holds.
- The bulk hold feature does not apply to Borrow by Mail requests.
- The bulk hold feature is not available in Mobile PAC.

Enabling Bulk Holds

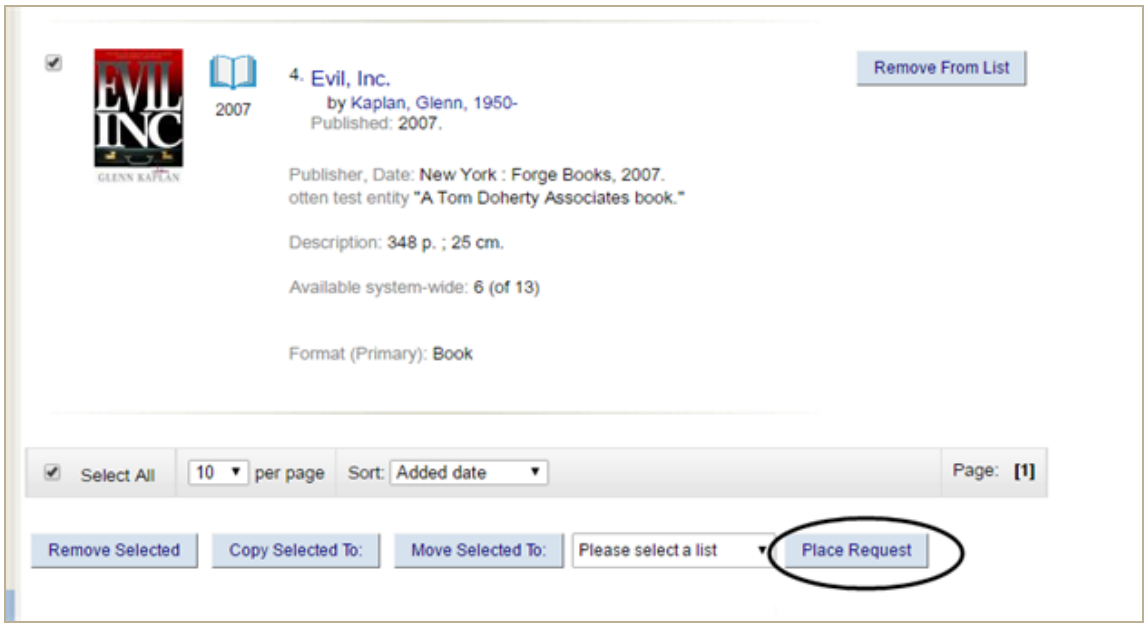
To enable this feature, first confirm that the setting **Enable title-level hold requests from PowerPAC and Mobile PAC** is checked for the connection branch (**Request** parameter **Holds options**, Requests tab).

Then set the new PowerPAC profile **Title list: Enable bulk holds** to **Yes**. The default value is **No**. When this profile is set to **Yes** and title-level hold requests from PAC are enabled, the **Place Request** button is displayed in working and saved title lists. It is available at the system, library, and branch levels; the system uses the PAC connection branch setting.

By default, 10 titles can be processed in one bulk hold request. You can change this number with the new PowerPAC profile **Title list: maximum number of titles to request in bulk**. The range is 1-100. It is available at the system, library, and branch levels; the system uses the PAC connection branch setting.

Placing Bulk Hold Requests

In Polaris PowerPAC, the logged-in patron checks at least one title in a working or saved title list and clicks **Place Request**.

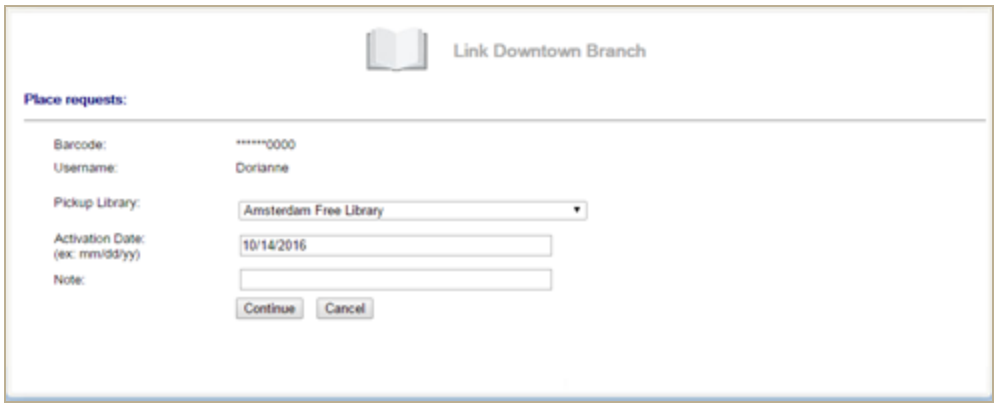


- The **Place Request** button is disabled if the patron has not selected at least one title in the list. The button is also disabled for secured patrons. (The button is not displayed at all if PAC title-level holds and bulk holds have not been enabled in Polaris administration. See "Enabling Bulk Holds" on page 12.)
- You can edit the **Place Request** button label in Polaris WebAdmin. The string mnemonic is **PACML_REQUESTS_1380**. See Polaris WebAdmin online help.
- If the patron has selected more titles than allowed by the PowerPAC profile **Title list: maximum number of titles to request in bulk**, the system displays a message: "You can only place [n] holds at once. Uncheck one or more titles and try again." You can edit the message in Polaris WebAdmin; the string mnemonic is **PACML_REQUESTS_MAXREQ**.

Place Requests Page

When the patron's selections meet the bulk hold limit and the patron clicks **Place Requests**, the Place Requests page is displayed. The patron can set an activation date; the patron can also select a pickup library and enter a note if these features are enabled for patron-initiated requests. See "Managing Holds" in Polaris staff client help for more information about these settings. This page also displays a policy statement link if the PAC profile **Patron access: Policy statement hypertext link permitted** is set to **Yes** for the connection branch.

> **Note:**
> The activation date must be entered in the format displayed on the Place Requests page. It cannot be in the past, and cannot be more than two years from the current date. If there is a problem with the date entry, the system displays a message. The patron clicks **OK** and re-enters the date.



You can edit the **Place requests:** title on this page in Polaris WebAdmin. The string mnemonic is **PACML_REQUESTS_1380**.

The Place Requests page displays a warning message if the system-level **Request** parameter **Holds Options** (Charges tab) is set to charge for holds. The patron can click **OK** to proceed or **Cancel** to exit. If your library system has set this option, you can edit the message in the **Request** parameter **Holds Options**, Charges tab.

The patron can click **Cancel** on the Place Requests page to return to the title list, where any titles previously checked remain checked, or (if not blocked) the patron can click **Continue** to proceed with the bulk hold requests. A progress indicator and the message "Checking status and limits..." are displayed. The WebAdmin string mnemonic for the message is **PACML_REQUESTS_1395**.

If placing the hold requests would meet or exceed the maximum total number allowed for the patron as set in the Patron/Material Type policy table, and the option **If the patron is blocked: Block in PAC** is checked in the **Holds Options** parameter (Staff client & PAC tab), the system displays a page with a message: "Your requests cannot be placed because you have reached your limit of [n] requests. You may want to cancel some requests from your patron account, then try again." The WebAdmin string mnemonic for the message is **ILL_BULK_BLOCKEDMAXNUMREQS**. The patron can click **Back** to return to the title list.

Confirm Bulk Requests Page

When the patron clicks **Continue** on the Place Requests page, the Confirm Bulk Requests page appears.

The list displays the selected titles, and for each title, the material types of the items that can potentially satisfy the request. The list can be sorted by clicking a column header (**Type** or **Title**). If the PAC profile **Patron access: Display hold queue information** is set to **Yes** for the patron's registered branch, the list includes an Active Requests column that displays how many other requests exist for the title. (This profile also affects the PAC patron account Requests page.) Titles with check boxes can be unchecked if the patron does not want them.

Titles without check boxes in the display cannot be requested at all, either because they are from remote databases, they are duplicates, they represent integrated eContent, the bibliographic record has been deleted but not yet removed by overnight processing, or due to item-related or patron-related conditions. A message specific to the error displays under the title of each request.

The Confirm Bullk Requests page displays appropriate messages if a request on a selected title or titles cannot be placed due to the following item-related conditions:

> **Note:**
> When no items can fill a request on a title and the checkbox is suppressed, the material type and active requests information is also suppressed.

- The title has no linked items and **If no items are attached: Block in PAC** is checked in the **Holds Options** parameter (Staff client & PAC tab). The system displays this message under the title: "No items are available to fill your request. Contact the library for assistance." The WebAdmin string mnemonic for this message is **ILL_TEXT_ NOITEMSAVAILABLE**.
- The title is linked to at least one item that is IN and **Prevent on status: In** is checked in the **Holds Options** parameter (Requests tab). The system displays this message under the title: "The request cannot be placed because a copy of this title is currently

available at the library. You can obtain the item at the library." The WebAdmin string mnemonic for this message is **ILL_TEXT_ERR_COPYAVAILABLE**.

- All items associated with the title are restricted from being held. The system displays this message under the title: "Requests are not permitted for this title. Contact the library for assistance." The WebAdmin string mnemonic for this message is **ILL_TEXT_REQNOTPERMITTED**.
- There are no item records linked to the title, or all the linked item records fit one or more of these conditions:
    - **Display in PAC** is set to No (not checked) in the item record, or
    - The item circulation status is set to be suppressed from the PAC display in the PAC profile **Suppress item display** for the connection branch, or
    - The connection organization is the System, and the linked item is assigned to a branch that is set for suppression from PAC in the system-level PAC profile **Suppress branches**,

      AND
    - Suppress **All records** is selected for the Type of Material (TOM) in the PAC profile **Suppress availability and requests** for the connection branch, or
    - Suppress **Records with an 856** is selected for the Type of Material (TOM) in the PAC profile **Suppress availability and requests** for the connection branch. Note that this selection applies only to records with the 856$u tag.

  The system displays this message under the title: "Requests are not permitted for this title. Contact the library for assistance." The WebAdmin string mnemonic for this message is **ILL_TEXT_REQNOTPERMITTED**.
- All items associated with the title have an excluded status. The system displays this message under the title: "This item is not available to fill your request. Contact the library for assistance." The WebAdmin string mnemonic for this message is **ILL_TEXT_ITEMNOTAVAILABLE**.
- The title is from a remote database, or the bibliographic record has been deleted but the cached copy has not yet removed by overnight processing. The system displays this message under the title: "The library does not own this title. You cannot request this title from your title list. You can search for the title in a remote database and request it individually, or contact the library for assistance." The WebAdmin string mnemonic for this message is **PACML_REQUESTS_REMOTEDB**.
- All items linked to the title are restricted, and at least one item's eContent check box is checked. The system displays this message under the title: "You cannot request this eContent title through bulk requests. Please contact your library for more information." The WebAdmin string mnemonic for this message is **ILL_BULK_NO_ECONTENT**.
- The title is a journal and **Allow requests on serials in PAC and Staff client** is set in the **Holds options** parameter, Requests tab (Manage item requests). The system

displays this message under the title: "Serial issues must be searched for and requested individually." The WebAdmin string mnemonic for this message is **ILL_BULK_SERIALSNOREQ**.

- The title is a multi-part set and **Allow requests on multi-part sets is set in PAC and Staff client** is set in the **Holds options** parameter, Requests tab (Manage item requests). The system displays this message under the title: "Multi-volume sets must be searched for and requested individually." The WebAdmin string mnemonic for this message is **ILL_BULK_MULTIPARTNOREQ**.
- The title appears in the list more than once, so the system does not allow the duplicate request. The system displays this message under the title: "This title is a duplicate of another title in this list." The WebAdmin string mnemonic for this message is **PACML_REQUESTS_1396**.

The Confirm Bullk Requests page also displays appropriate messages if a request on a selected title or titles cannot be placed due to patron-related conditions as specified in Polaris Administration. See "Managing Hold Requests" in Polaris staff client online help for more information about these settings. The following situations are examples:

- Placing a hold request on a title would result in a duplicate request. The system displays this message: "The request cannot be placed because a duplicate request has been found. Please check your account." The WebAdmin string mnemonic for the message is **ILL_TEXT_DUPLICATEREQ**.
- If placing these hold requests would exceed the maximum total number allowed for the patron as set in the Patron/Material Type policy table, and **If the patron is blocked: Block in PAC** is checked in the Holds Options parameter (Staff client & PAC tab) for the pickup branch, the system displays a message: "You currently have [n] total requests. You are allowed a maximum of [n]. Uncheck [n] and click Update." The WebAdmin string mnemonic for the message is **ILL_BULK_ILL_BULK_EXCEEDMAXREQUESTS**.
- Placing the hold requests would exceed the maximum number of holds for a particular material type for the patron as set in the Patron/Material Type policy table and **If the patron is blocked: Block in PAC** is checked in the Holds Options parameter (Staff client & PAC tab). The system displays this message: "You will exceed the maximum number of requests allowed for one or more material types:". The WebAdmin string mnemonic for the message is **ILL_BULK_EXCEEDMATERIALLIMITS**. Separate messages then detail the material types affected; for example:
  - "Book: maximum = 20; uncheck 4 of this type" (**ILL_BULK_EXCEEDMATERIALLIMITS_UNCHECK**)
  - "Audiobook: maximum = 5; limit reached, uncheck all of this type" (**ILL_BULK_EXCEEDMATERIALLIMITS_UNCHECKALL**)

Note:
For both maximum holds and maximum holds for material type, if the system-level Patron Services parameter **Consortium circulation - Patron blocks** is set to **Transacting branch**, the pickup branch's setting for **Block in PAC** determines

whether the patron can place the hold requests. If **Consortium circulation - Patron blocks** is set to **Patron branch**, the patron's registration branch setting for **Block in PAC** determines whether the patron can place the hold requests.

The Confirm Bulk Requests page may also display warning messages for certain titles with checkboxes:

- An item attached to a selected title might fill the request, and the Patron Services parameter **Check-out: Charge options** for the item's assigned branch is checked for the logged-in patron's code. The default message text is "If your request is filled you may be charged to borrow this item according to the policy of the owning library." You can edit the message in WebAdmin. The string mnemonic is **ILL_BULK_CHARGECKOREQ**.
- The title has no linked items, but **If no items are attached: Block in PAC** is *not* checked in the Holds Options parameter (Staff client & PAC tab). The default message text is "This title has no items. Your request may not be filled." You can edit the message in WebAdmin. The string mnemonic is **ILL_TEXT_NOITEMSAVAILABLE_BULK**.

The patron can uncheck selected titles if necessary, and click **Update**. If no titles are selected and the patron clicks **Update**, a message is displayed: "You must select one or more titles, or click Cancel to return to your title list" (WebAdmin string mnemonic **PACML_REQUESTS_1394**). When the list is satisfactory, and after the patron has clicked **Update** to save any changes, the patron clicks **Confirm**. If the patron clicks **Cancel**, the display returns to the page of the title list that was displayed when the patron navigated away from the page; any titles previously checked remain checked.

You can edit the text of page elements on the Confirm Bulk Requests page in Polaris WebAdmin. The string mnemonics are as follows:

LABEL	MNEMONIC
Confirm bulk requests	PACML_REQUESTS_1381
Click Update to make changes. Click Confirm to submit your hold requests.	PACML_REQUESTS_1382
Type	PACML_REQUESTS_1383
Active Requests	PACML_REQUESTS_1384
Title	PACML_REQUESTS_1385
Update	PACML_REQUESTS_1386
Confirm	PACML_REQUESTS_1387
Cancel	PACML_REQUEST_XSL_1652

Bulk Requests Results Page

When the patron clicks **Confirm**, a "processing" spinner icon is briefly displayed with the message **Creating requests . . .**. You can edit the message in Polaris WebAdmin (string mnemonic **PACML_REQUESTS_1393**). When processing is complete, the system displays the Bulk Requests Results page with the message: **Your requests were successfully placed!**

The patron can select **Return to your Title List**, **Go to your list of hold requests**, or **Log Out**. The labels can be edited in Polaris WebAdmin. The string mnemonics for the page are as follows:

LABEL	MNEMONIC
Bulk requests results: [page title]	PACML_REQUESTS_1389
Return to your Title List	PACML_REQUESTS_1392
Go to your list of hold requests	PACML_REQUEST_GOTO_ACCOUNT
Log Out	PACML_BASICINFO_1195

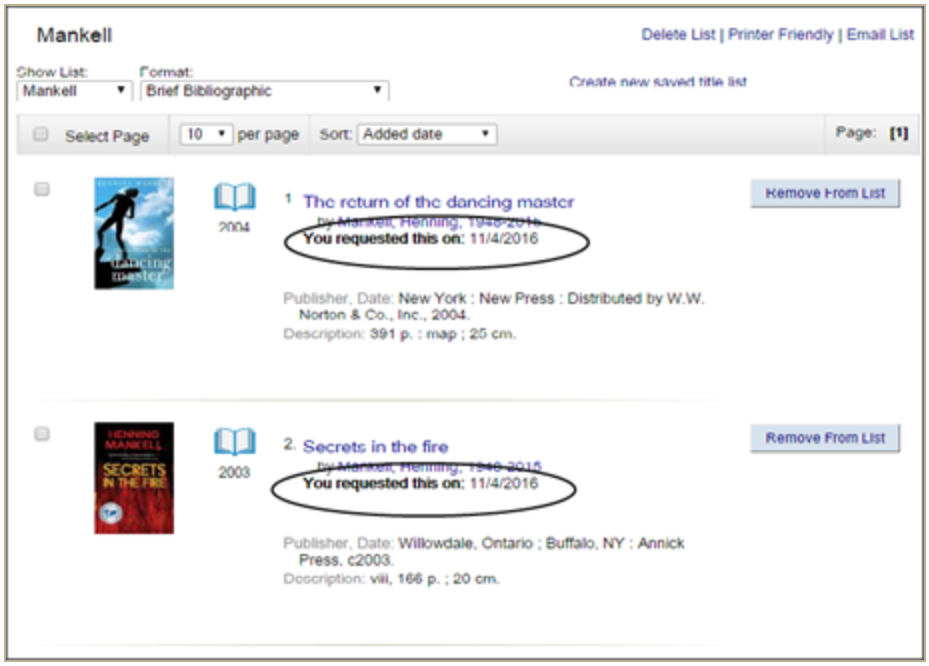
Bulk Holds Processing

Bulk Holds processing uses two new database tables: BulkHolds and BulkHoldsBibs. These tables are populated with data needed during bulk holds processing but not required once the bulk holds process has completed. A Bulk Holds Cleanup step has been added to the Hold Request Cleanup Nightly SQL job. This step deletes all entries in the BulkHolds and BulkHoldsBibs tables that are over 120 minutes old.

PAC Requested Titles Indicator

You can choose to display a new "requested" indicator in Polaris PowerPAC and Mobile PAC for titles on which the patron has an active, pending, held, shipped, or located hold request. The indicator is a message: **You requested this on [date]**; the system supplies the date.

The indicator is available for display to logged-in patrons on the PowerPAC search results page, the full display for a title, the working title list, and saved title lists. In Mobile PAC, the indicator can be displayed to logged-in patrons on the search results page, the title screen, the working title list, and saved title lists. The example shows the requested indicator in a saved title list.



The **Requested date** indicator is available in the PowerPAC and Mobile PAC Title Display Configure profiles in System Administration. Using the Title Display Configure dialog, you can specify where in the bib data display you want the indicator to appear.

The Brief and Full configuration view settings in the profiles apply to both search results screens and title lists; that is, when you set the **Requested date** indicator to display in search results, it will also display in working and saved title lists. For detailed information about using these profiles, see "Configuring the PowerPAC Title Display" and "Configuring the Mobile PAC Title Display" in Polaris staff client online help.

Note:
At this time the indicator is enabled only for requests that have been placed in Polaris. The requested indicator does not apply to integrated econtent titles.

Availability and Assigned Branch Facets in PowerPAC Narrow Your Search

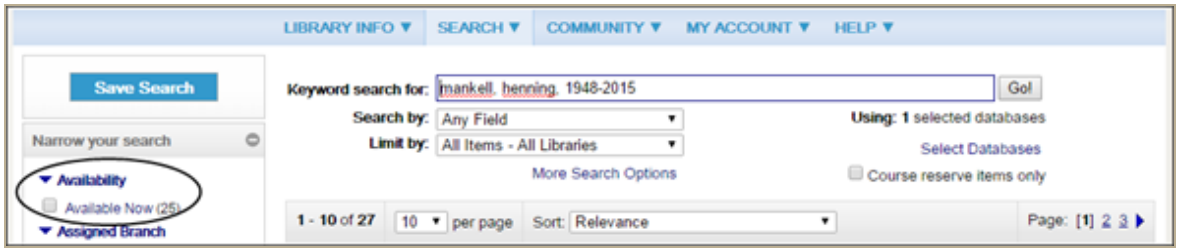
Polaris 5.2 offers a new Availability facet under the Narrow Your Search dashboard. Used in conjunction with the improved Assigned Branch facet, your patrons can now filter their search results to identify items that are available anywhere or at specific branches. Item availability for most titles is updated in real time.

The **Assigned Branch** facet now consults the system administration Item Availability Display Order policy table for the connection branch to show local libraries first in the list of assigned branches, making it easier for patrons to find available titles that are nearby.

Libraries that currently have "availability" or "assigned branch" limits configured for the **Limit By** search drop-down list may want to consider using the facets instead. The new Availability facet works much like the “availability” **Limit By** feature, but PowerPAC users can combine the facet with multiple assigned branches to retrieve a narrow or wide range of available titles from their search results.

Libraries whose branches all connect at the system level can take advantage of the new Availability facet since both local and system organizations (as defined in the Item Availability Display Order table) are included in the Availability facet results. For more information about the Item Availability Display Order table, see "Setting Up Local and System Availability" in Polaris staff client help.

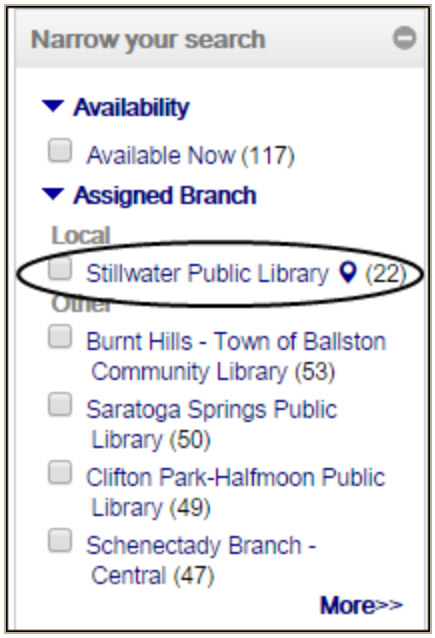
When you enable the facet, an **Available now** check box is displayed in the Narrow Your Search dashboard for search results. The **Available now** line also displays the number of titles that will be in the search results list if **Available now** is checked.



Libraries listed under the **Assigned Branch** facet are divided into two categories: **Local** and **Other**. **Local** lists those branches defined as local in the Item Availability Display Order policy table for the connection branch. **Other** lists those branches defined as system in the Item Availability Display Order policy table. You can edit the **Local** and **Other** labels in Polaris WebAdmin; the string mnemonics are **PACML_DASHBOARD_LOCAL** and **PACML_DASHBOARD_OTHER**.

A branch appears in the Assigned Branch list only if it has at least one item on at least one title in the search results. Within each category, organizations are listed in descending order by the number of titles that will be retrieved if the facet is selected. The connection branch

appears at the top of the local list. An icon indicates the connection branch. See the example below.



If the assigned branch in an item record is changed, the change is reflected in the results the next time a search is done.

The **Assigned Branch** facet uses the **Minimum to Show** and **Maximum to Show** settings in the PowerPAC profile **Dashboards: Narrow your search & Related searches**. The settings are applied to the list as a whole, regardless of where the local/other cut-off point may occur for any given set of search results. As in previous versions of Polaris, the system limit on the number of entries for the web part is 99.

A title is available for a connection branch when these conditions are met:

- **Display in PAC** is checked in the bib record, and either:
  - There is at least one linked item record where the item record status is Final, and
  - The item circulation status is In, and
  - The assigned branch is in the Item Availability Display Order policy table for the connection branch, and
  - **Display in PAC** is checked in the item record, and
  - The item's circulation status is *not* checked in the PAC profile **Suppress Item Display** for the connection branch (for example, shelving or non-circulating).
- Or **Display in PAC** is checked in the bib record, there is an issue record, the issue is not linked to an item, and the issue is linked to a subscription Serial Holdings record and is retained.

Note:
Bib records that do not typically have linked item records (for example, titles from

remote databases, non-integrated eContent titles, digital collections, and cataloged web sites) have an availability count of 0, and are not included in the filtered search results list when **Available Now** is checked.

Note:
For integrated eContent, the availability results reflect the status of the Polaris eContent item records and are accurate unless a checkout or checkin has taken place in the last few minutes.

When the patron checks **Available now**, but does not check an **Assigned Branch** facet, the search results list is filtered to display the titles that meet the requirements for displaying in PAC and have at least one item record that is "available" at a branch listed in the organization's Item Availability Display Order table. Bib records that do not meet those requirements are no longer in the search results list. The **Assigned Branch** facet lists only organizations that have at least one item record that is available at a branch listed in the organization's Item Availability Display Order table. The assigned branch facet count for an organization is the number of titles that will be in the search results list if that assigned branch facet is selected.

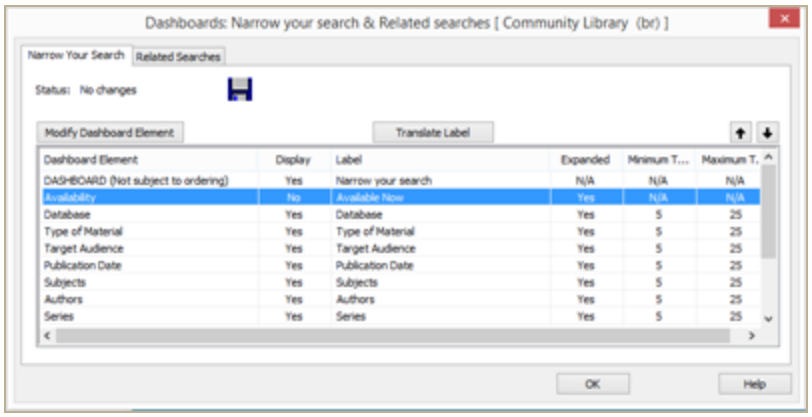
If the patron checks both **Available Now** and an **Assigned Branch** facet, the search results list is filtered to display only the titles that meet all current requirements for displaying in PAC and have at least one item record that is available at the selected assigned branch. The **Assigned Branch** facet count on the remaining assigned branch facets includes a plus sign and the number of records that will be added to the search results list if the patron selects the branch facet.

When the **Availability** facet is combined with another dashboard facet, each title in the results list matches both facet selections. When the **Availability** facet is combined with a CQL filter from the **Limit By** drop-down list, each title in the results list matches both the CQL filter and the availability facet. When the availability facet is combined with title-level **More Search Options** (Publication Dates, Target Audiences, Languages), each title in the results list matches both the selected options and the availability facet. When the availability facet is combined with item-level **More Search Options** (Libraries, Detailed Material Types, Collections), each title in the results list matches the selected item-level search options and the selected facets, but the selected options and facets are not necessarily on the same item record.

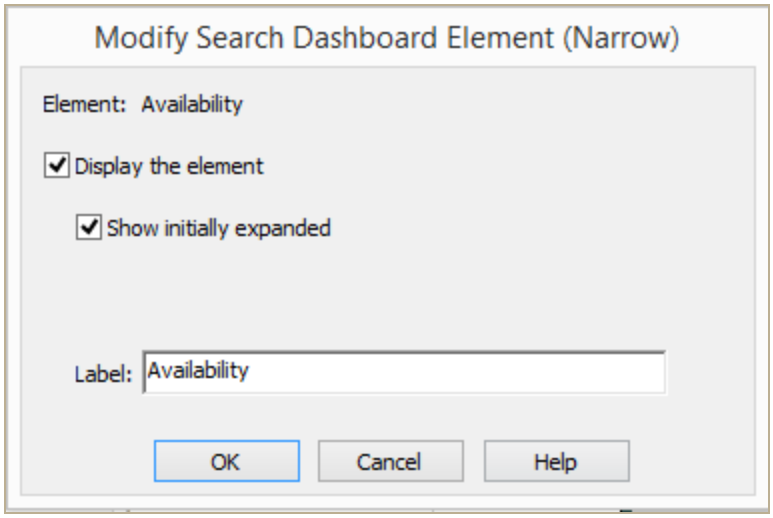
Once **Available now** is checked, it remains checked if the user navigates to the full display for a title or logs in to place a request, then returns to the search results. The facet checkbox is cleared when a new search is launched, the PAC times out, the user clicks **Reset** after setting **More Search Options**, or the user logs in from the **My Account** menu.

To display the Availability facet in the Narrow Your Search dashboard:

1. Open the PowerPAC profile **Dashboards: Narrow your search & Related searches**.
2. Select **Availability**.



3. Click **Modify Dashboard Element**. The Modify Search Dashboard Element dialog box opens.
4. Check **Display the element** and click **OK**. The dialog box closes.



5. (Optional) Consider using the arrow buttons to position the Assigned Branch facet immediately under the Availability facet.
6. Click **OK** to save your changes and close the profile dialog box.

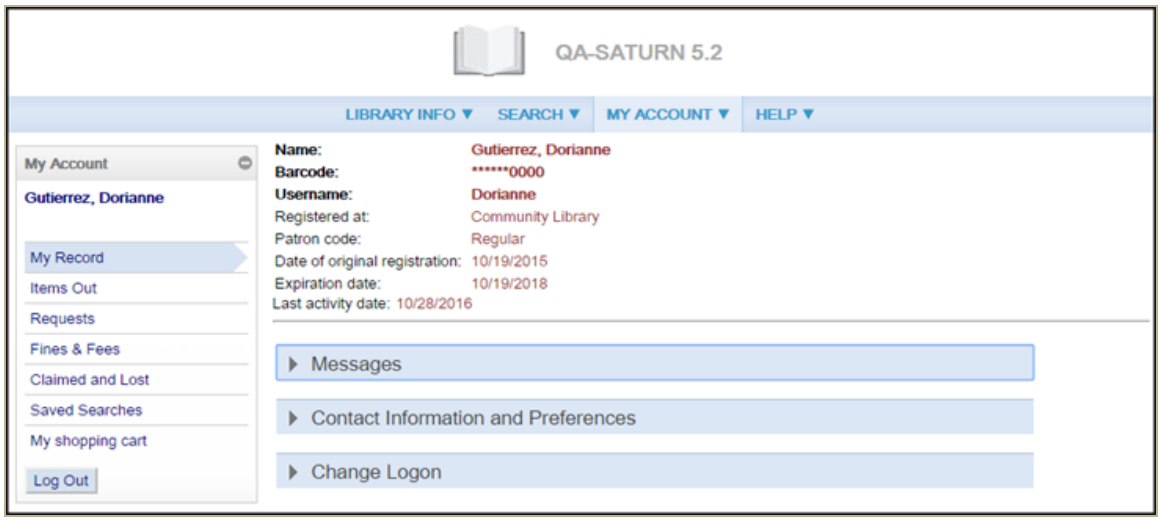
   For more information about setting up PowerPAC search dashboards, see "Setting PowerPAC Narrow/Related Search Options" in Polaris staff client online help.

Cloud Library Renamed cloudLibrary

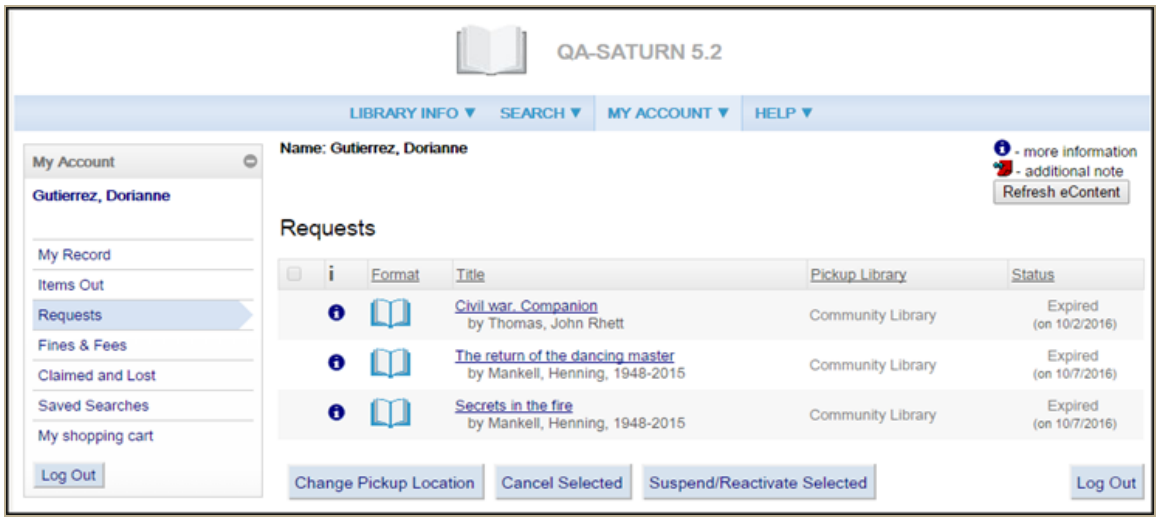
Bibliotheca's Cloud Library product (formerly 3M Cloud Library) for eContent has been renamed **cloudLibrary**. Innovative will be working with Bibliotheca to gradually include the new name in bib record fields (538 tags, 710 tags, etc.). In the meantime, if you have customized PAC language strings in Polaris WebAdmin that refer to this product, you may want to edit your strings to avoid patron confusion.

PowerPAC Patron Account Page Design

The patron account information display in Polaris PowerPAC has been streamlined. The changes described here have been made to help prepare the patron account pages for responsive web design (coming in a future release). The My Record page continues to show full account information in the header area, including barcode, username, registered branch, patron code, original registration date, expiration date, current blocks, and last activity date; for example:



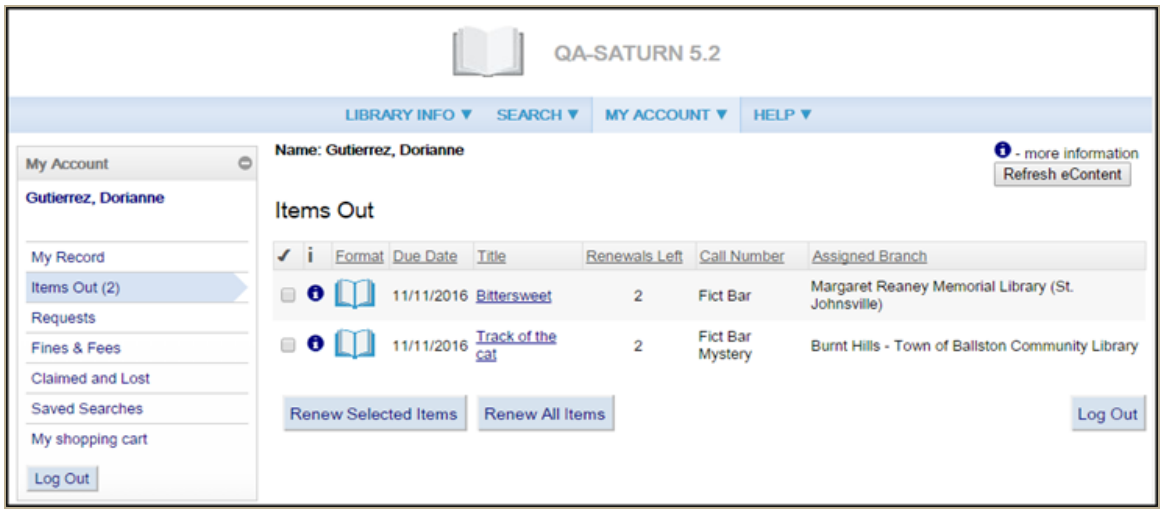
Other patron account pages (Items Out, Requests, Fines & Fees, Claimed and Lost, Reading History, Saved Searches, My shopping cart, and Community) now show only the patron's name but continue to display messages, the information and additional note icons, and the Refresh eContent button in the header area when applicable. The example shows the Requests page:



In addition, the column order on the Items Out page has changed, with the most relevant columns on the left. This change accommodates display on narrow screens. From left to right, the new column order is:

- Check boxes
- Information icon
- Format icon
- Due date
- Title
- Renewals left
- Call number
- Assigned branch

An example is shown below:



New PAC Web Link Icon

This new icon replaces the globe icon to indicate a link to an external web resource. The new icon appears wherever the Web Link (Short) entity is set for display in the PowerPAC and Mobile PAC **Title Display: Configure** or **Community Information Display: Configure** profiles for the connection branch, and in Polaris PowerPAC Children's Edition when the title information includes a web link. The illustration below is an example from PowerPAC:

In PowerPAC and Mobile PAC, when the user clicks the icon, the web resource opens in a new browser tab or window. As in previous releases of Polaris, the Children's PAC web link is "live" only when the Children's PAC profile **Web access: Enable** is set to **Yes** for the connection branch.

Scanning a Driver's License for Patron Registration

In previous versions of Polaris, the patron name might be entered incorrectly when you scanned a California driver's license during patron registration; for example, the name might be truncated or extra characters might be added. Also, carriage returns might be included in the address that cause formatting issues in notices and reports. These problems have been corrected in Polaris 5.2 software, but you must also reconfigure the scanner to run in a mode that returns the line feed character which indicates the end of each field in the driver's license.

For the Gryphon 44XX scanner, the correct mode is **USB Alternate Keyboard**. The image for reconfiguring the Gryphon 44XX scanner is on page 12 of the scanner user guide, and is reproduced below:

Modify a Purchase Order After Release

The following changes allow staff members with the appropriate permission to make changes to a purchase order line item and line item segments after the purchase order has been released. You can make two types of changes:

- Change a header fund and material type on a PO line item for **all** PO line item segments
- Change the fund, destination branch, and/or or collection for an individual PO line item segment

Your changes are also reflected in any linked items and open invoices.

> **Note:**
> You can use SimplyReports to report on the "modify PO line item" action. Item List and Count reports include a **History action** drop-down list in the item general filters. Select **Modified via PO Line Change Fund processing** in the **History action** drop-down list. For more information, see SimplyReports online help.

New Acquisitions Permission

The new branch-level Polaris Acquisitions permission, **Purchase orders: Change fund, destination, collection**, can be granted to designated staff members so that they can modify the material type, destination, collection, and fund for purchase order line items on released purchase orders. Staff members with this permission can perform the following actions on released purchase orders for the branch at which the permission was assigned:

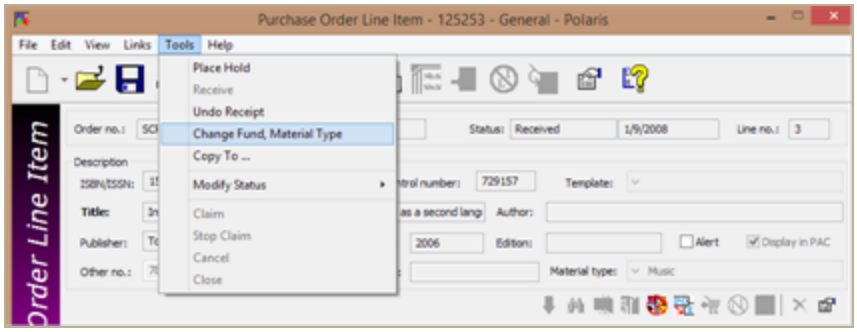
- Change a fund for **all** segments on a purchase order line item with the identical fund
- Change the material type for a purchase order line item
- Change the fund, destination, and collection for a purchase order line item segment

The new permission is added to the Administrator Group and all workstations, but it is unassigned to staff members by default.

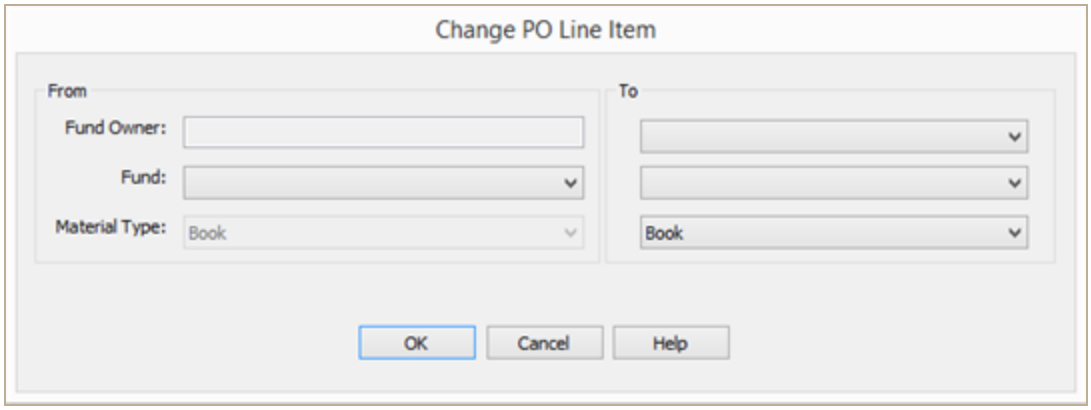
Change the Header Fund or Material Type for a Purchase Order Line Item

Staff members with the **Purchase orders: Change fund, destination, collection** permission can now use the new Tools menu option, **Change Fund, Material Type**, on the Purchase Order Line Item workform to replace an existing fund with another fund for all line item segments and/or change the item material type for the line item. The option is also available by pressing **ALT+T,F**. This option is available for Purchase Order Line Items with a status of On Order, Partly Rec, Received, Backordered, Exceptional Condition, Never

Published, Not Yet Published, Out of Print, Return Requested, or Returned. Any linked invoices must be Open to reflect the change.



When you select the **Change Fund, Material Type** option, the Change PO Line Item dialog box opens.



To change the fund:

1. In the **From** section, select the current fund from the drop-down list. The list consists of the funds linked to all the PO line item segments in the line item. (The **Fund Owner** field is blank until a fund has been selected.)

   Note:
   If a segment is linked to two or more funds, the funds do not appear in the list unless they are also used in another segment. You cannot change the fund for segments linked to two or more funds with this method.

2. In the **To** section, select the new Fund from the drop-down list. The list displays funds based on the settings in the Acquisitions/Serials profile **Acq fund droplist setup** for the logged-on user.
3. (Optional) In the **To** section, select a Fund Owner from the drop-down list to filter the Fund list. The list displays organizations based on the setting for the Acquisitions/Serials profile **Filter branches in line item segments** for the organization listed in the purchase order's **Ordered At** section.
4. Click **OK**. A confirmation message appears if the change can be made.

Note:
If the change cannot be made, the system displays a message: **One or more segment statuses are ineligible, are split across funds, or they are linked to paid invoice lines.** Click **OK** to return to the Change PO Line Item dialog box and edit your changes, or click **Cancel** and make your changes by editing a PO line item segment directly.

5. Click **OK** to confirm the change, or click **Cancel** to cancel it.

When a fund change is successful, the system replaces the old fund with the new one in all affected PO line item segment(s). For each segment, the system records a disencumber transaction in the old fund and an encumbrance transaction in the new fund. The funding source field is also updated in the linked on-order items, and the funds are changed in the linked invoice line item segments.

The current material type is displayed in the **Material Type** box. To change the material type:

1. In the **To** section of the Change PO Line Item dialog box, select the new Material Type from the drop-down list.
2. Click **OK**. A confirmation message appears if the change can be made.
3. Click **OK** to confirm the change, or click **Cancel** to cancel it.

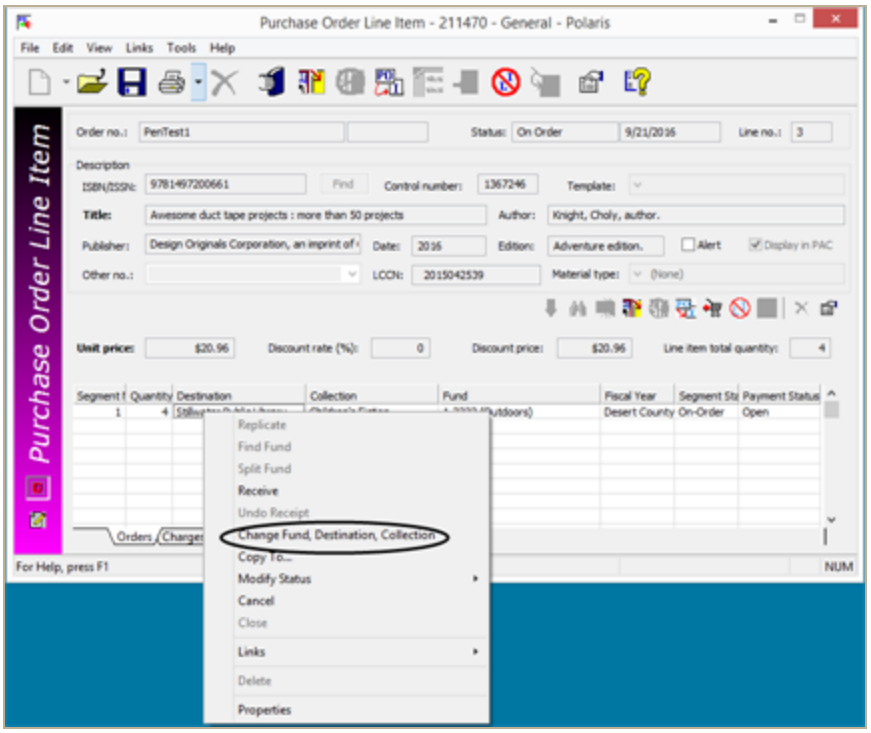
When a material type change is successful, the new material type is saved for the PO line item and linked on-order items. The item history is also updated.

Change the Fund, Destination Branch, or Collection for a PO Line Item Segment

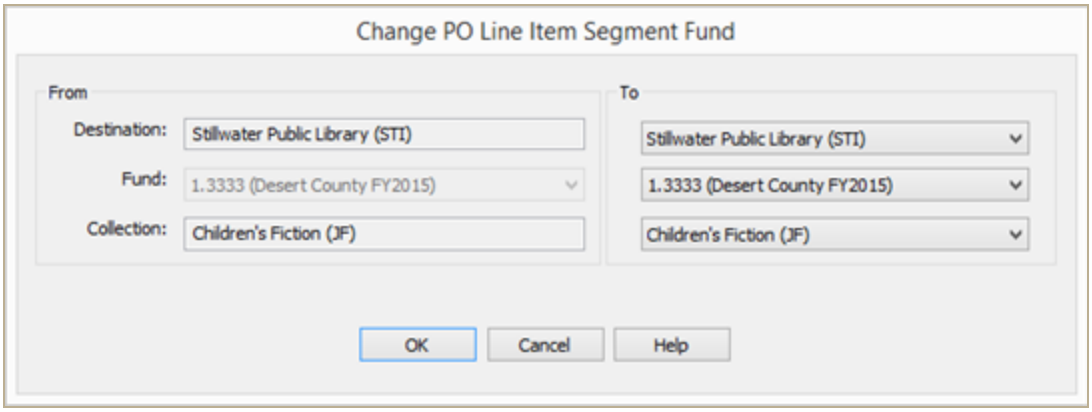
Staff members with the **Purchase Order: Change Fund, Destination, Collection** permission can now change the fund, destination branch, and/or the collection for a purchase order line item segment on a released purchase order. The line item segment status must be On Order, Received, Backordered, Exceptional Condition, Never Published, Not Yet Published, Out of Print, Return Requested, or Returned, the invoice payment status must be Open, and only one fund can be linked to the segment.

To change the fund, destination, and/or collection of a line item segment:

1. Right-click the line item segment in the PO Line Item workform. The context menu appears.



2. Select **Change Fund, Destination, Collection**. The Change PO Line Item Segment dialog box opens. The **From** section of the dialog box shows the current destination, fund,and collection for the line item segment.



3. To change the destination, select the new destination in the **To** section of the dialog box.
4. To change the fund, select the new fund in the **To** section of the dialog box.
5. To change the collection, select the new collection in the **To** section of the dialog box.
6. Click **OK**. A confirmation message appears.
7. Click **OK** to confirm the change, or click **Cancel** to cancel it.

- If the destination is changed, any linked on-order items are updated with the new **Assigned Branch**(The Home and Owning branches are unchanged.)
- If the collection is changed, any linked on-order items are updated with the new **Assigned Collection**.
- The item record history is updated for assigned branch and collection changes.
- The invoice line item/segment is updated with the new assigned branch and/or collection.
- If the segment fund is changed, a disencumber transaction is posted in the old fund, an encumbrance transaction is posted in the new fund, and the **Funding Source** field on the Item Record workform, Source and Acquisition view is updated for any linked on-order item records. The open invoice line item/segment fund is also updated with the new fund.

INN-Reach Administration Permissions

Polaris Administration now includes two System-level permissions for staff who will use the web-based INN-Reach Administration tool to monitor INN-Reach processes on the local server:

- **INN-Reach administration: Access** - When this permission is granted without the new Modify permission, staff can access the INN-Reach Administration page and view the data, but cannot change any settings. With Access permission only, the following options do not appear:
  - Home, Status - **Data Upload and Synchronization** menu
  - Home, Diagnostics, Circulation Exceptions - **Requeue Selected** button, **Delete Selected** button, and check boxes
  - Home, Diagnostics, Contribution Exceptions - **Requeue Selected** button, **Delete Selected** button, and check boxes
- **INN-Reach administration: Modify** - When a staff member has both the Access and Modify permissions, all options are available.

  Note:
  INN-Reach administrators must have a Polaris login to access these permissions.

These permissions are added to the Administrator group and all workstations. Staff members who had the **Access INN-Reach administration: Allow** permission are granted the new **INN-Reach administration: Access** permission by default. The new **INN-Reach administration: Modify** permission is not granted by default.

See also:

- "INN-Reach Automatic Return at Check-In Processing Expanded" on page 36
- "Edit Need-by and Held Period When PAC Requests Are Disabled for ILL Holds" on page 37
- "Virtual Bibliographic Records Assigned the Type of Material (TOM) from the ILL Request" on page 39
- "Leap - Picklist Updates" on page 139

INN-Reach Automatic Return at Check-In Processing Expanded

INN-Reach automatic return processing has been expanded to expedite processing for INN-Reach ILL items. In Polaris 5.1 SP1, when the Request parameters **INN-Reach: Automatic return at check-in** and **INN-Reach: Use my branch to ship/receive materials** are set to **Yes** for the check-in branch, and an INN-reach ILL item is checked in after circulating to the patron, the item status changes from Out to In and then Returned-ILL in a single process. In Polaris 5.2, when the parameters are set to **Yes** for the check-in branch, the following *additional* item status transitions produce the automatic Returned-ILL status:

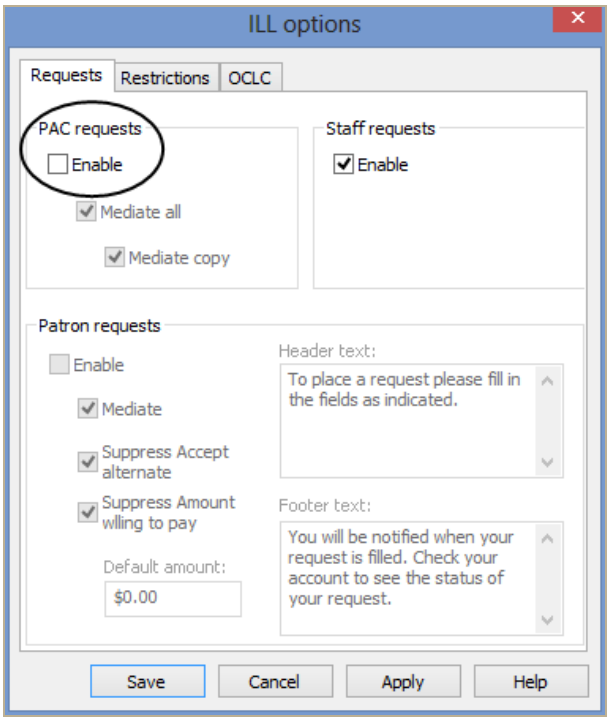
- **IN-TRANSIT to IN** - Item returns In-Transit from another branch.
- **HELD to IN**- Item is pulled from the hold shelf and checked in without circulating.
- **Item status is IN and ILL Request status is Return Uncirculated** - Item was created when Received in Request Manager, and the **Return Uncirculated** checkbox is set. (In this case, the receiving branch has the parameters set to **Yes**.)
- **LOST to IN** - Item is checked in after being declared Lost.
- **CLAIM RETURN to IN** - Item is checked in after being declared Claim Returned.
- **CLAIM NEVER HAD to IN** - Item is checked in after being declared Claim Never Had.
- **MISSING to IN** - Item is checked in after being declared Missing.
- **WITHDRAWN to IN** - Item is checked in after being Withdrawn.
- **BINDERY to IN** - Item is checked in after being declared (in) Bindery.
- **IN-REPAIR to IN** - Item is checked in after being declared In-Repair.
- **UNAVAILABLE to IN** - Item is checked in after being declared Unavailable.
- **CLAIM MISSING PARTS to IN** - Item is checked in after being declared Claim Missing Parts.

This feature is also available in a patch to Polaris 5.1 SP1.

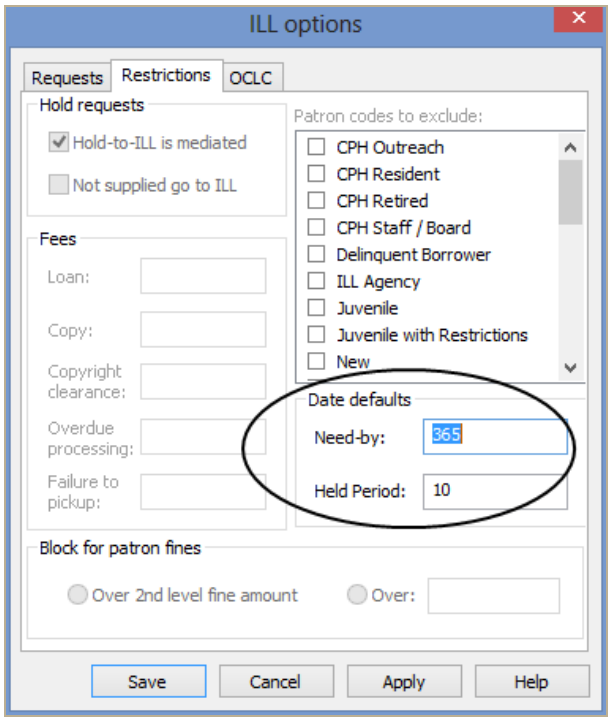
Edit Need-by and Held Period When PAC Requests Are Disabled for ILL Holds

Libraries that use INN-Reach for interlibrary loans can now prevent patrons from placing ILL holds through the PAC but still modify the defaults for the number of days that an INN-Reach ILL request should be filled and the number of days that an INN-Reach ILL item is held. Previously, if interlibrary loans were not allowed from the PAC, administrators could not modify the ILL date defaults.

When the **PAC requests**, **Enable** check box is unchecked on the Requests tab of the ILL options dialog box, patrons cannot place interlibrary loan requests from the Polaris PowerPAC or Mobile PAC.



On the Restrictions tab, the **Need-by** and **Held Period** fields can now be modified even if PAC requests are disabled for ILL holds.


ILL options
Requests
Restrictions
OCLC
Hold requests
Hold-to-ILL is mediated
Not supplied go to ILL
Fees
Loan:
Copy:
Copyright clearance:
Overdue processing:
Failure to pickup:
Patron codes to exclude:
CPH Outreach
CPH Resident
CPH Retired
CPH Staff / Board
Delinquent Borrower
ILL Agency
Juvenile
Juvenile with Restrictions
New
Date defaults
Need-by:
365
Held Period:
10
Block for patron fines
Over 2nd level fine amount
Over:
Save
Cancel
Apply
Help

Virtual Bibliographic Records Assigned the Type of Material (TOM) from the ILL Request

When an INN-Reach or other ILL item is received, and the staff member uses the Brief Item Entry dialog box to create the virtual bib and item records, the primary TOM from the ILL Request is now assigned to the virtual bibliographic record. Before this change the ILL requests were updated with the correct TOMs, but the virtual bibliographic records were created with the primary TOM of Book. This feature is also available in a patch to Polaris 5.1 SP1.

Polaris API Changes - Overview

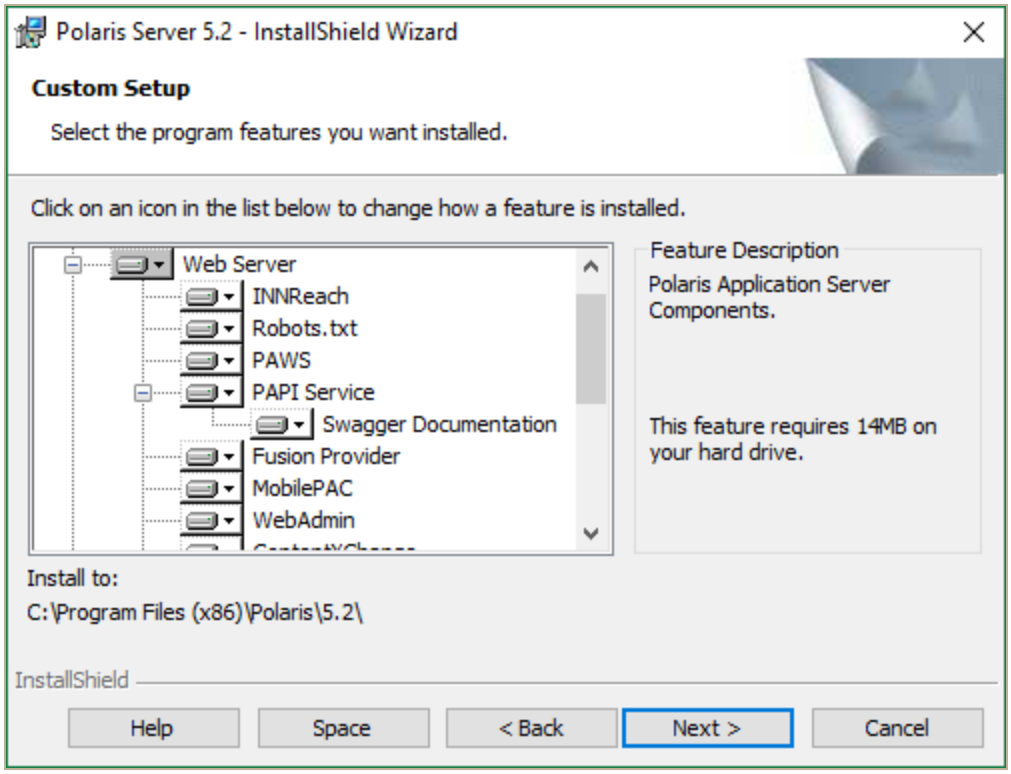
The Polaris API (PAPI) has been improved as follows:

- You can now use Swagger™, a framework for APIs, for the PAPI service. See "PAPI Uses Swagger" on page 41.
- The following methods have changed:
  - "AuthenticatePatron" on page 42
  - "NotificationUpdate" on page 45
  - "PatronHoldRequestsGet" on page 53
  - "PatronItemsOutGet" on page 57
  - "PatronRegistrationCreate" on page 62
  - "PatronUpdate" on page 69
- The following methods are new:
  - "DatesClosed" on page 77
  - "PatronCodesGetResult" on page 80
  - "PatronILLRequestsGet" on page 83
  - "RecordSetContentPut" on page 87
  - "RecordSetRecordsGet" on page 89
  - "SAMobilePhoneCarriersGetResult" on page 92
  - "UpdatePickupBranchID" on page 95

PAPI Uses Swagger

Swagger is an open-source framework for REST APIs. The Polaris API now has a Swagger endpoint which provides code and documentation to Polaris customers and third-party vendors who use the Polaris API. For more information about Swagger, go to **http://swagger.io/**.

A new Polaris Web Server installation option provides access to the Polaris Swagger endpoint.



AuthenticatePatron

A call to AuthenticatePatron is required before calling any public method that requires a patron's password. Upon success, this method will return an access token. The access token will be used in place of the patron's password when building the hash for secure patron methods.

> **Note:**
> It is strongly recommended that HTTPS be used with this call. The HTTP body data will contain the patron's barcode and password.

New in Polaris 5.2:

- AuthenticatePatron supports either barcode or username in the XML body Barcode element.
- The method supports the **PAC override password** and **Enable Patron username** options as specified in the Polaris Administration PAC profile **Patron Access options - Log In**.

URI

/public/{version}/{lang_ID}/{app_ID}/{org_ID}/authenticator/patron

HTTP Verb

POST

Request Body XML

<PatronAuthenticationData>

<Barcode></Barcode>

<Password></Password>

</PatronAuthenticationData>

XML Body Elements

Name	Required	Description/Notes
Barcode	Yes	Barcode or Username
Password	Yes	Password

Authorization Required?

Yes

XML Elements Returned

Name	Description/Notes
AccessToken	Access token to be used in place of the patron's password when building the hash for patron methods.
PatronID	Patron ID

Example

https://[hostname]/PAPIService/REST/public/v1/1033/100/1/authenticator/patron

Header

Date: Sat, 14 May 2016 22:23:32 GMT

Authorization: PWS polarisdev:/uessDsxjU9iY2QJDNJbV+CZ62U=

Content-Type: text/xml

Body

<PatronAuthenticationData>

<Barcode>21756003332060</Barcode>

<Password>1234</Password>

</PatronAuthenticationData>

Return

<PatronAuthenticationResult>

<PAPIErrorCode>0</PAPIErrorCode>

<ErrorMessage/>

<AccessToken>$2a$10$nN4s2fmVtX.9PQnczt5zTOmTKFLrV/vZIDsoqAuaVANcRR14q0F3K</AccessToken>

<PatronID>358255</PatronID>

</PatronAuthenticationResult>

Error Code

-3001 Unable to authenticate the patron credentials

NotificationUpdate

The NotificationUpdate method will update the Notification Log and remove or update the Notification Queue entry. It is also responsible for updating related ItemCheckout data elements and rolling phone notification into print notification. This method should be called after a patron is contacted.

This method supports telephone notification processing, as well as email and text messaging for specific types of notices, and may be used in conjunction with the phone notification export process. Telephone notification rolls to print for 5 failure statuses: 7- No dial tone; 8 - Intercept tones heard; 9 - Probable bad phone number; 10 - Maximum number of retries exceeded; 11 - Undetermined error.

A call to AuthenticateStaffUser is required before calling any protected methods. See AuthenticateStaffUser in the Polaris API Guide. For more information about protected methods, see PAPI Protected Methods in the Polaris API Guide.

New in Polaris 5.2:

- Notification types added - 2nd Notice, ID = 18; Missing Part, ID=19, Manual Bill, ID=20
- Email, phone, and text messaging (SMS) delivery options are now supported for 1st, 2nd, and 3rd overdue notices (ID types 1, 12, and 13).
- Email and text messaging (SMS) delivery options are now supported for bills (ID type 11) and manual bills (ID type 12).
- Email, phone, and text messaging delivery options are now supported for holds notices (ID type 2) and 2nd holds notices (ID type 18)
- Email, phone, and text messaging delivery options are now supported for fine notices (ID type 8).
- Email, phone, and text messaging delivery options are now supported for missing part notices (ID type 19).
- Email, phone, and text messaging delivery options are now supportedfor cancellation notices (ID type 3).
- Email and text messaging delivery options are now supported for reminder notices (ID types 7, 9, 10).
- Email and SMS notification roll to print for 2 failure statuses: 13 - Email Failed - Invalid Address, and 14 - Email Failed.

URI

/protected/{version}/{lang_ID}/{app_ID}/{org_ID}/{access_token}/notification/{notification_type_ID}

HTTP Verb

PUT

Notification Type ID

ID	Notification Type
0	Combined
1	1st Overdue
2	Hold
3	Cancel
4	Recall
5	All
6	Route
7	Almost overdue reminder
8	Fine
9	Inactive Reminder
10	Expiration Reminder
11	Bill
12	2nd Overdue
13	3rd Overdue
14	Serial Claim
15	Polaris Fusion Access Request
16	Course Reserves
17	Borrow-By-Mail Failure Notice
18	2nd Hold
19	Missing Part
20	Manual Bill

Request Body XML

```
<NotificationUpdateData>
 <LogonBranchID />
 <LogonUserID />
 <LogonWorkstationID />
 <ReportingOrgID />
 <NotificationStatusID />
 <NotificationDeliveryDate />
 <DeliveryOptionID />
 <DeliveryString />
 <Details />
 <PatronID />
 <PatronLanguageID />
 <ItemRecordID />
</NotificationUpdateData>
```

XML Body Elements

Name	Required	Description/Notes
LogonBranchID	Yes	Logon branch ID
LogonUserID	Yes	Logon staff user ID
LogonWorkstationID	Yes	Logon workstation ID
ReportingOrgID	See notes	Required for email notification. Not required for telephony notification. System ID is automatically used for telephony due to its centralized processing.
NotificationStatusID	Yes	Notification Status ID 1 - Call completed – Voice 2 - Call completed - Answering machine 3 - Call not completed - Hang up 4 - Call not completed -

Name	Required	Description/Notes
		Busy 5 - Call not completed - No answer 6 - Call not completed - No ring 7 - Call failed - No dial tone (rolls to print) 8 - Call failed - Intercept tones heard (rolls to print) 9 - Call failed - Probable bad phone number (rolls to print) 10 - Call failed - Maximum number of retries exceeded (rolls to print) 11 - Call failed - Undetermined error (rolls to print) 12 - Email Completed 13 - Email Failed - Invalid address (rolls to print) 14 - Email Failed (rolls to print) 15 - Mail Printed
NotificationDeliveryDate	Yes	Notification Delivery Date

Name	Required	Description/Notes
DeliveryOptionID	Yes	Delivery Option ID 1 - Mailing Address 2 - Email Address 3 - Telephone 1 4 - Telephone 2 5 - Telephone 3 6 - FAX 7 - EDI 8 - TXT Messaging (SMS) * Only 2, 3, 4, 5, 8 currently supported *
DeliveryString	Yes	Phone number or email
Details	See notes	Status message from notification device. Manual bills require ItemBarcode in the Details tag. Cancellation notices require RequestID in the Details tag.
PatronID	Yes	ID of patron being notified
PatronLanguageID	See notes	Language ID used to contact patron. If not supplied, the default will be the patron's preferred language. 1033 – English 1042 – Korean 1049 – Russian 1066 – Vietnamese 1141 – Hawaiian

Name	Required	Description/Notes
		2052 – Chinese 3082 – Spanish 3084 – French 12289 – Arabic
ItemRecordID	See notes	ID of item record attached to notification. Required for overdue, hold and cancel phone notifications. ItemRecordID or ItemBarcode required for hold notices, almost overdue reminders, missing part notices, and bills.

Authorization Required?

Yes

Protected method?

Yes

Return Codes

ID	Notification Type
0	Success
-1	Failure general
-5	Failure database
-6	Failure invalid

ID	Notification Type
	parameter
-2000	Item ID is invalid
-3000	Patron ID is invalid

XML Elements Returned

Name	Description/Notes
PAPIErrorCode	PAPI Error Code
ErrorMessage	Error or information message

Example

http://
[hostname]/PAPIService/REST/protected/v1/1033/100/1/HfOzmNFbhgIFMOQvFpZpjzCdM2Bq1Qcs/notification/1

Header

Date: Thu, 8 Aug 2011 22:23:32 GMT
Authorization: PWS polarisdev:/uessDsxjU9iY2QJDNJbV+CZ62U=
Content-Type: text/xml

Body

```
<NotificationUpdateData>
 <LogonBranchID>1</LogonBranchID>
 <LogonUserID>1</LogonUserID>
 <LogonWorkstationID>1</LogonWorkstationID>
 <NotificationStatusID>1</NotificationStatusID>
 <NotificationDeliveryDate>2011-08-04</NotificationDeliveryDate>
 <DeliveryOptionID>3</DeliveryOptionID>
 <DeliveryString>3155551212</DeliveryString>
 <Details>Call completed - Voice</Details>
 <PatronID>299377</PatronID>
 <ItemRecordID>2035574</ItemRecordID>
</NotificationUpdateData>
```

Return

```
<NotificationUpdateResult xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
 <PAPIErrorCode>-1</PAPIErrorCode>
 <ErrorMessage>NotificationQueue entry does not exist for this delivery
option.</ErrorMessage>
</NotificationUpdateResult>
```

PatronHoldRequestsGet

Returns a list of hold requests placed by the specified patron. The list can be filtered by ALL hold requests or by the status of the request.

New in Polaris 5.2:

- Designation and VolumeNumber are returned if present in data.
- PACDisplayNotes (up to 255 characters from the PAC Display Note field) are returned.

URI

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}/holdrequests/all

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}/holdrequests/inactive

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}/holdrequests/active

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}/holdrequests/pending

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}/holdrequests/shipped

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}/holdrequests/held

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}/holdrequests/notsupplied

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}/holdrequests/unclaimed

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}/holdrequests/expired

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}/holdrequests/cancelled

URI Parameters

Name	Required	Description/Notes
patron_barcode	Yes	Barcode of patron

HTTP Verb

GET

Authorization required?

Yes

XML Elements Returned

One or more hold requests placed by the patron. The list is sorted in ascending order by activation date.

Name	Description/Notes
HoldRequestID	Polaris ID of the Hold Request
BibID	The ID of the associated bibliographic record
StatusID	Polaris ID of the status of the hold request 1 - Inactive 3 - Active 4 - Pending 5 - Shipped 6 - Held 7 - Not Supplied 8 - Unclaimed 9 - Expired 16 - Cancelled
StatusDescription	Description of the status of the hold request
Title	Title of the item
Author	Author of the item
CallNumber	Call Number of the item
FormatID	Polaris ID of the type of format
FormatDescription	Format description
PickupBranchID	ID of branch at which the item should be picked up
PickupBranchName	Name of branch at which the item should be pickup up
PickupByDate	Date that the item will be held until
QueuePosition	Position this hold request is in the queue for this bibliographic record. This may be null depending on the status of the hold

Name	Description/Notes
	request.
QueueTotal	Total number of hold requests for this bibliographic record.
ActivationDate	Date the hold request was activated. An activation date in the future means the request is currently inactive.
ExpirationDate	Expiration date of the hold request
GroupName	Name used to identify a group of titles that can satisfy this hold request
ItemLevelHold	Is the request an item level hold, or will any item associated with this title satisfy the request.
BorrowByMail	Is the request a Borrow by Mail type of request.
Designation	Designation, when present
VolumeNumber	Volume, when present
PACDisplayNotes	PAC Display Note field (maximum 255 characters)

Example

http://localhost/PAPIService/REST/public/v1/1033/100/1/patron/21756003332022/holdrequests/all

Header

Date: Wed, 09 Oct 2009 22:23:32 GMT
Authorization: PWS polarisdev:fB5eam199jSdF5lf3SLJ+czTHpM=

Return - Success

HTTP/1.1 200 OK
Content-Type: application/xml; charset=utf-8

<PatronHoldRequestsGetResult xmlns:i="http://www.w3.org/2001/XMLSchema-instance"><PAPIErrorCode>0</PAPIErrorCode><ErrorMessage/><PatronHoldRequestsGetRows><PatronHoldRequestsGetRow><HoldRequestID>801604</HoldRequestID><BibID>620893</BibID><StatusID>8</StatusID><StatusDescription>Unclaimed</StatusDescription><Title>Moose"s big idea</Title><Author>Greene, Stephanie.</Author><CallNumber>J Fict Gre</CallNumber><FormatID>1</FormatID><FormatDescription>Book</FormatDescription><PickupBranchID>90</PickupBranchID><PickupBranchName>Saratoga Springs Public Library</PickupBranchName><PickupByDate>2008-12-13T23:59:00</PickupByDate><QueuePosition>0</QueuePosition><QueueTotal>0</QueueTotal><ActivationDate>2008-12-03T00:00:00</ActivationDate><ExpirationDate>2009-04-

02T23:59:00</ExpirationDate><GroupName/><ItemLevelHold>false</ItemLevelHold></PatronHoldRequestsGetRow><PatronHoldRequestsGetRow><HoldRequestID>801645</HoldRequestID><BibID>84712</BibID><StatusID>8</StatusID><StatusDescription>Unclaimed</StatusDescription><Title>Seven plays of the modern
theater.</Title><Author/><CallNumber>808.82
S49</CallNumber><FormatID>1</FormatID><FormatDescription>Book</FormatDescription><PickupBranchID>92</PickupBranchID><PickupBranchName>Schenectady County Public Library - Central</PickupBranchName><PickupByDate>2009-03-
23T23:59:00</PickupByDate><QueuePosition>0</QueuePosition><QueueTotal>0</QueueTotal><ActivationDate>2008-12-09T00:00:00</ActivationDate><ExpirationDate>2009-06-
07T23:59:00</ExpirationDate><GroupName/><ItemLevelHold>false</ItemLevelHold></PatronHoldRequestsGetRow></PatronHoldRequestsGetRows></PatronHoldRequestsGetResult>

Return - Failed

```
HTTP/1.1 401 Unauthorized
WWW-Authenticate: PWS realm="Polaris API"
```

```
HTTP/1.1 200 OK
Content-Type: application/xml; charset=utf-8
```


```
<PatronHoldRequestsGetResult xmlns:i="http://www.w3.org/2001/XMLSchema-
instance"><PAPIErrorCode>-1</PAPIErrorCode><ErrorMessage>Invalid Status ID
Filter</ErrorMessage><PatronHoldRequestsGetRows
i:nil="true"/></PatronHoldRequestsGetResult>
```

PatronItemsOutGet

Returns list of items out to the specified patron. The list can be filtered by ALL items out, OVERDUE items only, or LOST items only.

New in Polaris 5.2:

- Designation and VolumeNumber are returned if present in data.
- CanItemBeRenewed (true/false) is returned.

URI

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}/itemsout/all

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}/itemsout/overdue

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}/itemsout/lost

URI Parameters

Name	Required	Description/Notes
patron_barcode	Yes	Barcode of patron

HTTP Verb

GET

Authorization required?

Yes

XML Elements Returned

One or more items checked out to or lost by the patron. The list is sorted in ascending order by due date.

Name	Description/Notes
ItemID	Polaris ID of the item record
Barcode	The item barcode
BibID	The ID of the associated bibliographic record
FormatID	Polaris ID of the type of format
FormatDescription	Format description
Title	Title of the item
Author	Author of the item
CallNumber	Call Number of the item
CheckOutDate	Check Out Date of the item
DueDate	Due Date of the item
RenewalCount	Number of times item has been renewed by this patron. (For LOST items, this value will always be '0').
RenewalLimit	Maximum number of times this item can be renewed by this patron. (For LOST items, this value will always be '0').
AssignedBranchID	Polaris ID of the branch to which the item is assigned.
AssignedBranchName	Name of the branch to which the item is assigned.
LoaningBranchID	Polaris ID of the branch from which the item was checked out.
LoaningBranchName	Name of the branch from which the item was checked out.
BillingNoticeSent	(Boolean value) Was a billing notice sent for this item?
ReplacementChargeTxnID	(Integer value) Patron account transaction ID for a replacement charge (Can be used for accrued fines)
ProcessingChargeTxnID	(Integer value) Patron account transaction ID for a processing charge (Can be used for accrued fines)
OverdueChargeTxnID	(Integer value) Patron account transaction ID for an overdue charge (Can be used for accrued fines)

Name	Description/Notes
DisplayInPAC	(Boolean value) Is this item displayable to the public?
ElectronicItem	(Boolean value) Is this an electronic item?
VendorName	The vendor name associated with the electronic item
VendorAccountName	The vendor account name associated with the electronic item
VendorObjectIdentifier	The unique ID of the electronic item in the vendor's repository
ISBN	The ISBNs of the associated bibliographic records
ISSN	The ISSN of the associated bibliographic records
OCLCNumber	The OCLC number of the associated bibliographic records
UPCNumber	The UPC number of the associated bibliographic records
Designation	Designation, when present.
VolumeNumber	Volume, when present.
CanItemBeRenewed	Indicates whether item is renewable

Example

http://localhost/PAPIService/REST/public/v1/1033/100/1/patron/21756003332022/itemsout/all

Header

Date: Wed, 09 Oct 2016 22:23:32 GMT
Authorization: PWS polarisdev:IK0cRxywhfBT4oPoLEsoRBDkAVo=

Return - Success

HTTP/1.1 200 OK
Content-Type: application/xml; charset=utf-8

```
<PatronItemsOutGetResult xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
  <PAPIErrorCode>1</PAPIErrorCode>
  <ErrorMessage />
  <PatronItemsOutGetRows>
    <PatronItemsOutGetRow>
      <ItemID>9350467</ItemID>
```

<Barcode>fjkdsalfjds;afasl</Barcode>

<BibID>2931</BibID>

<FormatID>1</FormatID>

<FormatDescription>Book</FormatDescription>

<Title>Catts Edition 1 (Sep. 1 2009)</Title>

<Author>Steinberg, Phillip Orso.</Author>

<CallNumber>Fict 3 v.3</CallNumber>

<CheckOutDate>2011-10-05T08:57:49.41</CheckOutDate>

<DueDate>2011-11-02T23:59:00</DueDate>

<RenewalCount>0</RenewalCount>

<RenewalLimit>3</RenewalLimit>

<AssignedBranchID>38</AssignedBranchID>

<AssignedBranchName>Fort Plain Free Library</AssignedBranchName>

<LoaningBranchID>101</LoaningBranchID>

<LoaningBranchName>Southern Adirondack Library System</LoaningBranchName>

<BillingNoticeSent>1</BillingNoticeSent>

<ReplacementChargeTxnID>3635064</ReplacementChargeTxnID>

<ProcessingChargeTxnID>0</ProcessingChargeTxnID>

<OverdueChargeTxnID>3635065</OverdueChargeTxnID>

<DisplayInPAC>1</DisplayInPAC>

<ElectronicItem>false</ElectronicItem>

<VendorName i:nil="true" />

<VendorAccountName i:nil="true" />

<VendorObjectIdentifier i:nil="true" />

<ISBN>9780822512523</ISBN>

<ISSN i:nil="true" />

<OCLCNumber i:nil="true" />

<UPCNumber i:nil="true" />

<CanItemBeRenewed>true</CanItemBeRenewed>

<Designation>Edition 1 (Sep. 1 2009)</Designation>

```
            <VolumeNumber>v.3</VolumeNumber>
        </PatronItemsOutGetRow>
    </PatronItemsOutGetRows>
</PatronItemsOutGetResult>
```

Return - Failed

```
HTTP/1.1 401 Unauthorized
WWW-Authenticate: PWS realm="Polaris API"
```

```
HTTP/1.1 200 OK
Content-Type: application/xml; charset=utf-8
```

```
<PatronItemsOutGetResult xmlns:i="http://www.w3.org/2001/XMLSchema-
instance"><PAPIErrorCode>-1</PAPIErrorCode><ErrorMessage>Invalid Status ID
Filter</ErrorMessage><PatronItemsOutGetRows i:nil="true"/></PatronItemsOutGetResult>
```

PatronRegistrationCreate

Create a new patron registration record; basic patron duplicate detection (name, username, barcode) is performed.

New in Polaris 5.2:

- XML body elements now include ExpirationDate, AddrCheckDate, and PatronCode.
- A new error code, Invalid_Patron_Code (-3612) is added.

URI

/public/{version}/{lang_ID}/{app_ID}/{org_ID}/patron

XML Body Elements

Important:
XML elements must be in the order shown below.

Name	Order	Required	Description/Notes
LogonBranchID	1	Yes	Transaction processing field
LogonUserID	2	Yes	Transaction processing field
LogonWorkstationID	3	Yes	Transaction processing field
PatronBranchID	4	Yes	Patron's registering branch
PostalCode	5		Patron postal code
ZipPlusFour	6		Patron zip+4 code
City	7		Patron city
State	8		Patron state
County	9		Patron county
CountryID	10		Patron country
StreetOne	11		Patron street one
StreetTwo	12		Patron street two

Name	Order	Required	Description/Notes
NameFirst	13	Yes	Patron first name
NameLast	14	Yes	Patron last name
NameMiddle	15		Patron middle name
User1	16		System defined field for patron data
User2	17		System defined field for patron data
User3	18		System defined field for patron data
User4	19		System defined field for patron data
User5	20		System defined field for patron data
Gender	21		Use M, F, or N (not applicable)
Birthdate	22		Patron birthdate
PhoneVoice1	23		Patron phone
PhoneVoice2	24		Patron phone
EmailAddress	25		Patron email
LanguageID	26		Patron language iD - From Languages table 1 - English 2 - Spanish 3 - German 4 - French
DeliveryOptionID	27		1 Mail, 2 Email, 3 Telephone 1, 4 Telephone 2, 5 Telephone 3, 6 FAX, 7 EDI, 8 TXT messaging

Name	Order	Required	Description/Notes
UserName	28		Online user name
Password	29		Patron password
Password2	30		Patron password duplicate (for verification)
AltEmailAddress	31		Patron alternate email
PhoneVoice3	32		Patron phone
Phone1CarrierID	33		Phone 1 carrier ID. Database field not supported in 4.0 but included in the API to provide continuity with 4.1. Sample list from SA_ Mobilephonecarriers table: 1 - AT&T 2 - Bell Canada 8 - Sprint 9 - T_Mobile 10 - Tracfone 11 - Verizon 17 - Boost Mobile 22 - Rogers Canada
Phone2CarrierID	34		Phone 2 carrier ID. Database field not supported in 4.0 but included in the API to provide continuity with 4.1.

Name	Order	Required	Description/Notes
Phone3CarrierID	35		Phone 3 carrier ID. Database field not supported in 4.0 but included in the API to provide continuity with 4.1.
EnableSMS	36		Enable text messaging 0 - Do not send additional text notice 1 - Send additional text notice
TxtPhoneNumber	37		Phone number for TXT messaging 1 - PhoneVoice1 2 - PhoneVoice2 3 - PhoneVoice3 Also used for cell phone number in Polaris 4.0. See "Cell Phone Field in Polaris 4.0" on page 66.
Barcode	38		Patron barcode (if not auto-assigning)
EReceiptOptionID	39		Ereceipt option ID [4.1 only] 2 - Email Address 8 - TXT Messaging 100 - All
ExpirationDate	40		Patron card expiration date. Default used when date not provided.

Name	Order	Required	Description/Notes
AddrCheckDate	41		Patron card address check date. Default used when date not provided.
PatronCode	42		ID of patron code assigned to patron. Default used when ID not provided.

Cell Phone Field in Polaris 4.0

In Polaris 4.0, you may set the patron's Cell Phone (deprecated in v4.1) by using the TxtPhoneNumber element. Specifying this element will set the Cell Phone field and will use the corresponding carrier ID to populate the CellPhoneCarrierID (deprecated in v4.1). Example:

<PhoneVoice1>315-555-1212</PhoneVoice1>

<PhoneVoice3>315-555-1111</PhoneVoice3>

<Phone3CarrierID>1</Phone3CarrierID>

<TxtPhoneNumber>3</TxtPhoneNumber>

In this example, the 4.0 patron registration record will be populated as follows:

PhoneVoice1: 315-555-1212

PhoneVoice3: NULL

CellPhone: 315-555-1111

CellPhoneCarrierID: 1

The passed-in phone voice field used for the TxtPhoneNumber will be set to NULL to support the v4.0 to v4.1 conversion later. The v4.1 database upgrade will move the v4.0 CellPhone field into the first NULL PhoneVoice database field.

HTTP Verb

POST

Authorization required?

Yes

XML Elements Returned

Name	Description/Notes
Barcode	Patron barcode (can be input also if known ahead of time)
PatronID	Polaris Patron ID for newly created Patron

Example

http://localhost/PAPIService/REST/public/v1/1033/100/1/patron

Header

Date: Wed, 09 Oct 2009 22:23:32 GMT
Authorization: PWS polarisdev:/uessDsxjU9iY2QJDNJbV+CZ62U=
Content-Type: text/xml
Content-Length: 133

Body

```
<PatronRegistrationCreateData>
   <LogonBranchID>1</LogonBranchID>
   <LogonUserID>1</LogonUserID>
   <LogonWorkstationID>1</LogonWorkstationID>
   <PatronBranchID>74</PatronBranchID>
   <PostalCode>13090</PostalCode>
   <City>Liverpool</City>
   <State>NY</State>
   <StreetOne>100 Main Street</StreetOne>
   <NameFirst>Gary</NameFirst>
   <NameLast>Unmarried</NameLast>
   <PhoneVoice1>555-1212</PhoneVoice1>
   <EmailAddress>dude@hotmail.com</EmailAddress>
   <UserName>PolarisDude</UserName>
```

<Password>1234</Password>

<Password2>1234</Password2>

</PatronRegistrationCreateData>

Return - Success

HTTP/1.1 200 OK
Content-Type: application/xml; charset=utf-8

<PatronRegistrationCreateResult xmlns:i="http://www.w3.org/2001/XMLSchema-instance"><PAPIErrorCode>0</PAPIErrorCode><ErrorMessage/><Barcode>PACREG357166</Barcode><PatronID>357166</PatronID></PatronRegistrationCreateResult>

Return - Failed

HTTP/1.1 401 Unauthorized
WWW-Authenticate: PWS realm="Polaris API"

HTTP/1.1 200 OK
Content-Type: application/xml; charset=utf-8

<PatronRegistrationCreateResult xmlns:i="http://www.w3.org/2001/XMLSchema-instance"><PAPIErrorCode>-1</PAPIErrorCode><ErrorMessage>Procedure or function 'PAPI_PatronRegistrationCreate' expects parameter '@nPatronBranchID', which was not supplied.</ErrorMessage><Barcode/><PatronID>0</PatronID></PatronRegistrationCreateResult>

PatronUpdate

Update Patron Registration information.

New in Polaris 5.2:

- PatronUpdate now supports patron requests to change address. If this option is set in the Polaris Administration PAC profile **Patron Access Options - Contact info**, **Patron can request address change** and the patron requests a change, an email message confirming the request is sent to the patron if this option is set in the **Patron Access Options** profile, a Verify Patron block is placed on the patron record, and an email message is sent to a staff member. An error message (Address change request not permitted, -501) is sent if the **Patron can request address change** option is not set.
- The following xml body elements are added:
  - AltEmail address
  - EnableSMS
  - PhoneVoice2
  - PhoneVoice3
  - Phone1CarrierID
  - Phone2CarrierID
  - Phone3CarriedID
  - TxtPhoneNumber
  - EReceiptOptionID (including None)
  - ExcludeFromAlmostOverdueAutoRenew
  - ExcludeFromPatronRecExpiration
  - ExcludeFromInactivePatron
  - ExpirationDate
  - AddrCheckDate
  - PatronCodeID
  - AddressID
  - FreeTextLabel
  - StreetOne
  - State
  - County
  - PostalCode
  - Country
  - AddressTypeID
- Null (none) is now a valid input option for DeliveryOptionID

- You can remove an email address by sending a blank EmailAddress or Altemail address in the request body; for example: **<EmailAddress><\EmailAddress>** would remove whatever was in the record.

URI

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}

URI Parameters

Name	Required	Description/Notes
patron_barcode	Yes	Barcode of patron

XML Body Elements

Name	Required	Description/Notes
LogonBranchID	Yes	Current Branch (can default to System [1])
LogonUserID	Yes	Current User (can default to PolarisExec)
LogonWorkstationID	Yes	Current Workstation (can default to OPACDefault)
ReadingListFlag		Enable or disable reading list
EmailFormat		Format of email: 1 - Plain Text 2 - HTML

Name	Required	Description/Notes
DeliveryOptionID		Delivery options: 0 - None 1- Mailing address 2- Email address 3- Telephone 1 4- Telephone 2 5- Telephone 3 6- FAX 7- EDI 8- TXT Messaging
Email Address		Email address
PhoneVoice1		Primary phone number
Password		Patron's password
AltEmail address		Alternate email address
EnableSMS		Allow text messaging
PhoneVoice2		Telephone 2 number
PhoneVoice3		Telephone 3 number

Name	Required	Description/Notes
Phone1CarrierID		Mobile carrier for Telephone 1
Phone2CarrierID		Mobile carrier for Telephone 2
Phone3CarrierID		Mobile carrier for Telephone 3
TxtPhoneNumber		Mobile number for text messaging
EReceiptOptionID		0 - None 2 - Email receipt 8 - Text message receipt
ExcludeFromAlmostOverdueAutoRenew		Exclude patron from almost over-due/auto-renew reminder notices
ExcludeFromPatronRecExpiration		Exclude patron from patron record expiration reminder notices
ExcludeFromInactivePatron		Exclude from inact-ive patron reminder notices
ExpirationDate		Patron card expir-ation date
AddrCheckDate		Patron's address check date
PatronCodeID		ID of patron code assigned to patron
AddressID		Address ID of requested patron address change
FreeTextLabel		Address type label (for example, Home ot School) of reques-ted patron address

Name	Required	Description/Notes
		change
StreetOne		Street address of requested patron address change
State		State of requested patron address change
County		County of reques-ted patron address change
PostalCode		Postal code of requested patron address change
Country		Country of reques-ted patron address change
AddressTypeID		Address type of requested patron address change 1 - Generic 2 - Notices

HTTP Verb

PUT

Authorization required?

Yes

Example

http://localhost/PAPIService/REST/public/v1/1033/100/1/patron/21756003332022

Header

Date: Wed, 09 Oct 2009 22:23:32 GMT
Authorization: PWS polarisdev:YtS8qFIPK/+1dy36LRKdhmSyFZQ=
Content-Type: text/xml
Content-Length: 341

Body

```
<PatronUpdateData>
   <LogonBranchID>1</LogonBranchID>
   <LogonUserID>1</LogonUserID>
   <LogonWorkstationID>1</LogonWorkstationID>
   <EmailFormat>1</EmailFormat>
   <DeliveryOptionID>3</DeliveryOptionID>
   <EmailAddress>dude@hotmail.com</EmailAddress>
   <PhoneVoice1>315-555-3189</PhoneVoice1>
   <PhoneVoice2>315-555-3189</PhoneVoice2>
   <PhoneVoice3>315-555-3189</PhoneVoice3>
   <Password>12345</Password>
   <PatronCode>2</PatronCode>
   <PatronAddresses>
      <Address>
         <AddressID>1091488</AddressID>
         <FreeTextLabel>Home</FreeTextLabel>
         <StreetOne>PPPPPTTT</StreetOne>
         <State>NJ</State>
         <County>ONONDAGAA</County
         ><PostalCode>13000</PostalCode>
         <Country>USA</Country>
         <AddressTypeID>2</AddressTypeID>
      </Address>
      <Address>
         <AddressID>1091487</AddressID>
```

```
            <StreetTwo>SECOND STREETT</StreetTwo>
            <FreeTextLabel>Home</FreeTextLabel>
            <StreetOne>PPPPPTTT</StreetOne>
            <City>LIVERPOOLL</City>
            <City>LIVERPO</City>
            <State>NJ</State>
            <County>ONONDAGAA</County
            ><PostalCode>13000</PostalCode>
            <Country>USA</Country>
            <CountryID>2</CountryID>
            <AddressTypeID>2</AddressTypeID>
        </Address>
    </PatronAddresses>
</PatronUpdateData>
```

Return - Success

HTTP/1.1 200 OK
Content-Type: application/xml; charset=utf-8

```
<PatronUpdateResult xmlns:i="http://www.w3.org/2001/XMLSchema-
instance"><PAPIErrorCode>0</PAPIErrorCode><ErrorMessage/></PatronUpdateResult>
```

Return - Failed

HTTP/1.1 401 Unauthorized
WWW-Authenticate: PWS realm="Polaris API"

Error Messages

Code	Description
-501	Patron personal information change is not allowed
-3000	Invalid PatronID specified

Code	Description
-3518	Invalid Email address
-3519	Invalid DeliveryMethod Value (No Address for Patron)
-3520	Invalid Delivery Method Value (No Email Address for Patron)
-3521	Invalid DeliveryMethod Value (No PhoneVoice1 for Patron)
-3522	Invalid DeliveryMethod Value (No PhoneVoice2 for Patron)
-3523	Invalid DeliveryMethod Value (No PhoneVoice3 for Patron)
-3524	Invalid DeliveryMethod Value (No PhoneFax for Patron)
-3525	Invalid DeliveryMethod Value
-3526	Invalid EmailFormat Value
-3527	Invalid ReadingList Value
-3532	Invalid PhoneVoice1
-3533	Invalid Patron Password format
-3534	Invalid Password Length
-3535	Patron password change is not allowed
-3612	Invalid PatronCodeID
-3613	Invalid PhoneVoice2
-3614	Invalid PhoneVoice3
-3615	Invalid Alt Email Address
-3616	Invalid TXTPhoneNumber
-3617	Invalid PhoneCarrier
-3619	Invalid DeliveryMethod No Phone
-3620	Invalid Email Address for EReceipt

DatesClosed

This new method returns a list of dates closed by organization. If the specified organization ID does not exist, an error is returned (Invalid OrgID supplied, -5000).

URI

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/datesclosed

URI Parameters

Name	Required	Description/Notes
org_id	Yes	Organization ID

HTTP Verb

GET

Authorization required?

Yes

XML Elements Returned

Dates closed for the specified organization.

Name	Description/Notes
DateClosed	Date closed

Example

https://qa-saturn.polarislibrary.com/PAPIService/REST/public//public/v1/1033/100/3/datesclosed

Header

Date: Fri, 21 Oct 2016 22:23:32 GMT
Authorization: PWS polarisdev:fB5eam199jSdF5lf3SLJ+czTHpM=

Return - Success

HTTP/1.1 200 OK
Content-Type: application/xml; charset=utf-8

<DatesClosedGetResult xmlns:i="http://www.w3.org/2001/XMLSchema-instance"><PAPIErrorCode>0</PAPIErrorCode><ErrorMessage i:nil="true" />

<DatesClosedRows>

<DatesClosedRow><DateClosed>2014-08-03T00:00:00</DateClosed></DatesClosedRow>

<DatesClosedRow><DateClosed>2014-08-10T00:00:00</DateClosed></DatesClosedRow>

<DatesClosedRow><DateClosed>2014-08-17T00:00:00</DateClosed></DatesClosedRow>

<DatesClosedRow><DateClosed>2014-08-24T00:00:00</DateClosed></DatesClosedRow>

<DatesClosedRow><DateClosed>2014-09-07T00:00:00</DateClosed></DatesClosedRow>

<DatesClosedRow><DateClosed>2014-09-14T00:00:00</DateClosed></DatesClosedRow>

<DatesClosedRow><DateClosed>2015-07-04T00:00:00</DateClosed></DatesClosedRow>

<DatesClosedRow><DateClosed>2015-12-25T00:00:00</DateClosed></DatesClosedRow>

</DatesClosedRows>

</DatesClosedGetResult>

Error Message

If the organization ID does not exist in the database, error code -5000 ("Invalid OrganizationID supplied") is returned.

PatronCodesGetResult

This new method returns a list of valid patron codes. If the specified organization ID does not exist, an error is returned (Invalid OrgID supplied, -5000).

URI

/public/{version}/{lang-ID}/{product-ID}/{org-ID}/patroncodes

URI Parameters

Name	Required	Description/Notes
org_id	Yes	Organization ID

HTTP Verb

GET

Authorization required?

No

XML Elements Returned

Valid patron codes for the specified organization.

Name	Description/Notes
PatronCodeID	Patron code ID
Description	Patron code description

Example

https://qa-saturn.polarislibrary.com/PAPIService/REST/public//public/v1/1033/100/3/patroncodes

Header

Date: Fri, 21 Oct 2016 22:23:32 GMT
Authorization: PWS polarisdev:fB5eam199jSdF5lf3SLJ+czTHpM=

Return - Success

HTTP/1.1 200 OK
Content-Type: application/xml; charset=utf-8

```
<PatronCodesGetResult xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
   <PAPIErrorCode>0</PAPIErrorCode>
   <ErrorMessage></ErrorMessage>
   <PatronCodesRows>
      <PatronCodesRow>
         <PatronCodeID>1</PatronCodeID>
         <Description>Regular</Description>
      </PatronCodesRow>
      <PatronCodesRow>
         <PatronCodeID>2</PatronCodeID>
         <Description>Juvenile</Description>
         </PatronCodesRow>
         <PatronCodesRow>
         <PatronCodeID>3</PatronCodeID>
         <Description>Juvenile with Restrictions</Description>
      </PatronCodesRow>
      <PatronCodesRow>
         <PatronCodeID>4</PatronCodeID>
         <Description>Staff / Board</Description>
      </PatronCodesRow>
   </PatronCodesRows>
```

</PatronCodesGetResult>

Error Message

If the organization ID does not exist in the database, error code -5000 ("Invalid OrganizationID supplied") is returned.

PatronILLRequestsGet

This new method returns a list of ILL requests placed by the specified patron. The list can be filtered by the status of the request.

URI

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}/illrequests/all

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}/illrequests/ReceivedTransferred

/public/{version}/{lang-ID}/{app-ID}/{org-ID}/patron/{patron_barcode}/illrequests/cancelled

URI Parameters

Name	Required	Description/Notes
org_id	Yes	Organization ID
patron_barcode	Yes	Barcode of patron

HTTP Verb

GET

Authorization required?

Yes

XML Elements Returned

One or more ILL requests placed by the patron. The list is sorted in ascending order by activation date.

Name	Description/Notes
ILLRequestID	Polaris ID of the Hold Request
BibID	The ID of the associated bibliographic record
StatusID	Polaris ID of the status of the ILL request 0 - All 1 - Inactive 3 - Active 5 - Shipped 10 - ReceivedHeld 11 - ReceivedTransferred 12 - ReceivedSatisfied 13 - ReceivedUsed 14 - ReceivedUnUsed 15 - Returned 16 - Cancelled
StatusDescription	Description of the status of the ILL request
Title	Title of the item
Author	Author of the item
CallNumber	Call Number of the item (only populated after item is "received")
VolumeAndIssue	Volume and issue number if applicable
FormatID	Polaris ID of the type of material (TOM)
FormatDescription	Format description (TOM description)
PickupBranchID	ID of branch at which the item should be picked up
PickupBranchName	Name of branch at which the item should be pickup up
PickupByDate	Date that the item will be held until

Name	Description/Notes
ActivationDate	Date the ILL request was activated. An activation date in the future means the request is currently inactive.
NeedByDate	Provided by patron as the date by which the request is needed
OPACNotes	Note in public access catalog

Example

http://localhost/PAPIService/REST/public/v1/1033/100/3/patron/21234000002105//illrequests/all

http://localhost/PAPIService/REST/public/v1/1033/100/3/patron/21234000002105//illrequests/ReceivedTransferred

Header

```
Date: Wed, 09 Oct 2016 22:23:32 GMT
Authorization: PWS polarisdev:fB5eam199jSdF5lf3SLJ+czTHpM=
```

Return - Success

```
HTTP/1.1 200 OK
Content-Type: application/xml; charset=utf-8
```

```
<PatronILLRequestsGetResult xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
   <PAPIErrorCode>0</PAPIErrorCode>
   <ErrorMessage></ErrorMessage>
   <PatronILLRequestsGetRows>
      <PatronILLRequestsGetRow>
         <ILLRequestID>6</ILLRequestID>
         <ILLStatusID>11</ILLStatusID>
         <PatronID>71128</PatronID>
         <ItemRecordID>9475571</ItemRecordID>
         <BibRecordID>806821</BibRecordID>
         <PickupBranchID>107</PickupBranchID>
         <Author i:nil="true" />
```

```
            <Title>HARRY POTTER AND THE GOBLET OF FIRE BOO</Title>
            <Format>Sound Recording</Format>
            <CreationDate>2008-03-05T10:08:54.857</CreationDate>
            <ActivationDate>2011-11-18T09:06:06.86</ActivationDate>
            <Status>Received</Status>
            <Item>Transferred</Item>
            <NeedByDate>2009-03-05T00:00:00</NeedByDate>
            <PickupBranch>Waterford Public Library</PickupBranch>
            <FormatID>5</FormatID>
            <LastStatusTransitionDate>2011-12-
            06T16:21:12.857</LastStatusTransitionDate>
            <OpacNotes i:nil="true" />
            <CallNumber>ILL</CallNumber>
            <VolumeAndIssue i:nil="true" />
            <PickupByDate i:nil="true" />
        </PatronILLRequestsGetRow>
    </PatronILLRequestsGetRows>
</PatronILLRequestsGetResult>
```

Error Message

If the organization ID does not exist in the database, error code -5000 ("Invalid OrganizationID supplied") is returned.

RecordSetContentPut

This new method adds or removes records from a record set. In Polaris 5.2, the method supports only the patron record set.

URI

https://[host]/PAPIService/REST/protected/{ver}/{lang_id}/{product_id}/{org_id}/{AccessToken}/recordsets/{recordsetID}?userid={user_id}&wsid={workstation_id}&action=add

https://[host]/PAPIService/REST/protected/{ver}/{lang_id}/{product_id}/{org_id}/}/{AccessToken}/recordsets/{recordsetid}?userid={user_id}&wsid={workstation_id}&action=remove

URI Parameters

Name	Required	Description/Notes
org_id	Yes	Organization ID
user_id	Yes	Staff user ID
wsid	Yes	Workstation ID
recordsetid	Yes	Patron record set ID
action	Yes	Options: **add** or **remove**

HTTP Verb

PUT

Authorization required?

Yes

Body

<ModifyRecordSetContent><Records>1,2,3,4...</Records></ModifyRecordSetContent>

Error Messages

Code	Description
-8000	Invalid PolarisUserID supplied
-8001	Polaris user is not permitted
-9000	Invalid WorkstationID supplied
-11000	Supplied recordSetID is not of type patron
-11001	RecordSetID does not exist

RecordSetRecordsGet

This new method returns a list of record IDs in a specified record set. In Polaris 5.2, the method supports only the patron record set.

URI

/protected/{version}/{lang-ID}/{product-ID}/{org-ID}/recordsets/patron/{recordsetid}

URI Parameters

Name	Required	Description/Notes
org_id	Yes	Organization ID
user_id	Yes	Staff user ID
wsid	Yes	Workstation ID
recordsetid	Yes	Patron record set ID

HTTP Verb

GET

Authorization required?

Yes

XML Elements Returned

List of patron records in the specified record set.

Name	Description/Notes
PatronID	Patron record ID

Header

```
Date: Fri, 21 Oct 2016 22:23:32 GMT
Authorization: PWS polarisdev:fB5eam199jSdF5lf3SLJ+czTHpM=
```

Return - Success

```
HTTP/1.1 200 OK
Content-Type: application/xml; charset=utf-8

<RecordSetRecordsGetResult
   xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
   <PAPIErrorCode>0</PAPIErrorCode>
   <ErrorMessage i:nil="true" />
   <RecordSetRecordsGetRows>
      <RecordSetRecordsGetRow>
         <PatronID>33343</PatronID>
   </RecordSetRecordsGetRow>
   <RecordSetRecordsGetRow>
      <PatronID>33959</PatronID>
   </RecordSetRecordsGetRow>
   <RecordSetRecordsGetRow>
      <PatronID>73953</PatronID>
   </RecordSetRecordsGetRow>
   <RecordSetRecordsGetRow>
      <PatronID>132277</PatronID>
   </RecordSetRecordsGetRow>
   </RecordSetRecordsGetRows>
</RecordSetRecordsGetResult>
```

Error Messages

Code	Description
-8000	Invalid PolarisUserID supplied
-8001	Polaris user is not permitted
-9000	Invalid WorkstationID supplied
-11000	Supplied recordSetID is not of type patron
-11001	RecordSetID does not exist

SAMobilePhoneCarriersGetResult

This new method returns content from the SA_MobilePhoneCarriers table for a specified organization, which specifies the mobile phone carrier selections available for patron record phone fields.

URI

/protected/{version}/{lang-ID}/{app-ID}/{org-ID}/{access-token}/sysadmin/mobilephonecarriers

URI Parameters

Name	Required	Description/Notes
org_id	Yes	Organization ID

HTTP Verb

GET

Authorization required?

Yes

XML Elements Returned

One or more hold requests placed by the patron. The list is sorted in ascending order by activation date.

Name	Description/Notes
CarrierID	ID of mobile phone carrier
CarrierName	Name of mobile phone carrier

Name	Description/Notes
email2SMSemailAddress	SMS address
NumberOfDigits	Specifies number of digits in phone number; always 10
Display	Display flag

Example

https://qa-saturn.polarislibrary.com/PAPIService/REST/protected/v1/1033/100/3/OwrTPOInpRtHYILu4vjKj2cmoGLZQ5zh/sysadmin/mobilephonecarriers

Header

Date: Fri, 21 Oct 2016 22:23:32 GMT
Authorization: PWS polarisdev:fB5eam199jSdF5lf3SLJ+czTHpM=

Return - Success

HTTP/1.1 200 OK
Content-Type: application/xml; charset=utf-8

```
<SAMobilePhoneCarriersGetResult xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
  <PAPIErrorCode>26</PAPIErrorCode>
  <ErrorMessage></ErrorMessage>
  <SAMobilePhoneCarriersGetRows>
    <SAMobilePhoneCarriersGetRow>
      <CarrierID>1</CarrierID>
      <CarrierName>AT&amp;amp;T</CarrierName>
      <Email2SMSEmailAddress>@txt.att.net</Email2SMSEmailAddress>
      <NumberOfDigits>10</NumberOfDigits>
      <Display>true</Display>
    </SAMobilePhoneCarriersGetRow>
    <SAMobilePhoneCarriersGetRow>
      <CarrierID>2</CarrierID>
```

```
            <CarrierName>Bell Canada</CarrierName>
            <Email2SMSEmailAddress>@txt.bellmobility.ca</Email2SMSEmailAddress>
            <NumberOfDigits>10</NumberOfDigits>
            <Display>false</Display>
        </SAMobilePhoneCarriersGetRow>
    </SAMobilePhoneCarriersGetRows>
</SAMobilePhoneCarriersGetResult>
```

UpdatePickupBranchID

This new method updates the pickup branch for a hold request when the patron requests the change. The hold request status must be one that is allowed for change requests according to the system-level Polaris Administration setting for the Request parameter **Holds Options - Pickup**. Possible allowed statuses include Active, Held, Inactive, Located, Pending, and Shipped.

URI

/public/{version}/{lang-ID}/{AppID}/{OrgID}/patron/{PatronBarcode}/holdrequests/{RequestID}/pickupbranch?userid={user_id}&wsid={workstation_id}&pickupbranchid={pickupbranch_id}

HTTP Verb

PUT

Authorization required?

Yes

Example

https://qa-saturn.polarislibrary.com/PAPIService/REST/public/v1/1033/100/1/patron/12345678/holdrequests/123/pickupbranch?userid=1&wsid=1&pickupbranchid=3

Return - Success

HTTP/1.1 200 OK
Content-Type: application/xml; charset=utf-8

```
<?xml version="1.0" encoding="UTF-8"?>
<PAPIResult xmlns:i="http://www.w3.org/2001/XMLSchema-instance">
    <PAPIErrorCode>0</PAPIErrorCode>
    <ErrorMessage />
</PAPIResult>
```

Error Message

An invalid request status ID returns the error message **Cannot change pickup branch for request in statusID** (-4016). In addition to any request statuses not allowed due to system administration settings, invalid status IDs include the following:

Invalid StatusID	Description
7	Not supplied
8	Unclaimed
9	Expired
16	Cancelled
17	Out to patron

SimplyReports

Editing Saved Bib List and Count Reports

You can now edit all column and filter settings for saved Bib List and Count reports, in addition to saved Item, Patron, Patron Account, and Holds List and Count reports. For more information about editing saved reports, see SimplyReports online help.

Polaris ExpressCheck

It is no longer necessary to manually reset ExpressCheck printer options when you upgrade from Polaris 5.0 or Polaris 5.1. The ec_printers.xml file is automatically moved from the Polaris 5.0 or Polaris 5.1 folder to the Polaris 5.2 folder.

Note:
If you re-install an older version of Polaris you must manually reset the ec_printers.xml file or copy the file from the newer version back to the old one.

Leap - Create, Copy, and Modify Item Records

If you have the appropriate Polaris permissions, you can now create and modify item records in Leap.

When you create an item, the following permissions and profiles in Polaris Administration are checked:

- Cataloging permissions:
  - Item records: Create
  - Item templates: Access
- Cataloging profiles:
  - Bring price from bib to item record when link is made. If this profile is set to **Yes**, the price is copied according to the Item Create Price Hierarchy database table.
  - Bring call number fields from bib to item record when link is made. If this profile is set to **Yes**, the call number fields are copied according to the Item Create Call Number Hierarchy database table.
  - Default shelving scheme for new item and holdings records.

When you modify an item record in Leap, the following permissions are checked:

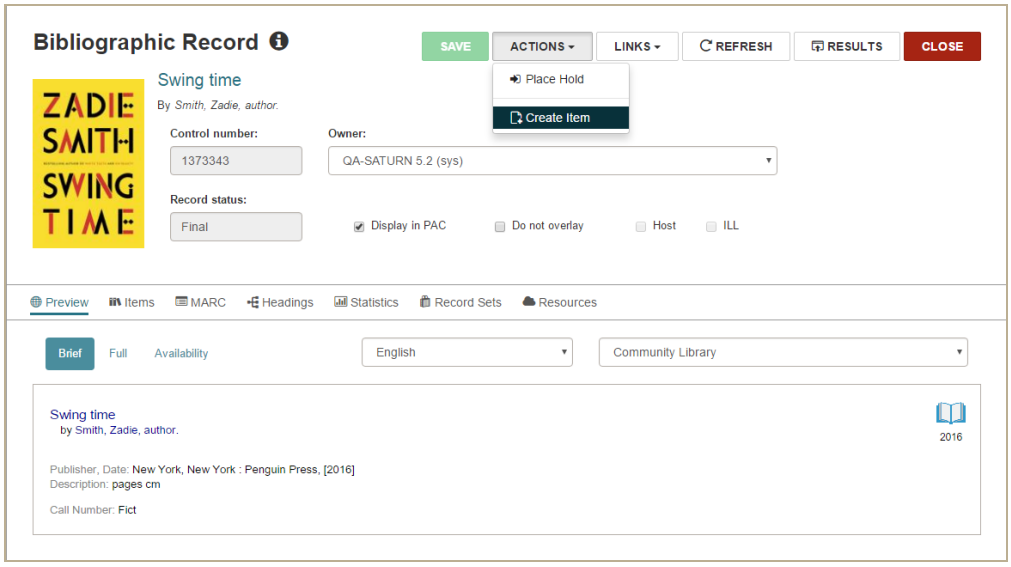
- Item records: Access
- Item records: Modify cataloging view. In Leap, this permission applies to the Controls view.
- Item records: Modify header. In Leap, this permission applies to the Details view.
- Item records: Modify notes and notices view. In Leap, this permission applies to the Blocks and Notes view; Notices is a separate view that cannot be edited.
- Item records: Modify source and acquisition view. In Leap, this permission applies to the Source and Donor view.

Create an Item from a Bibliographic Record

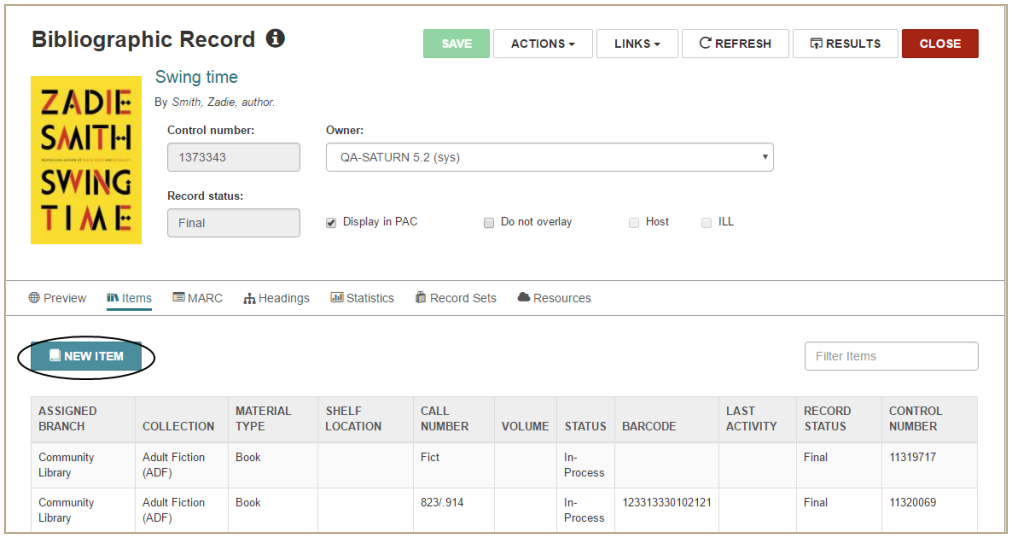
To add a new item linked to a bibliographic record:

1. Open the Bibliographic Record workform.
2. Open the New Item Record workform:

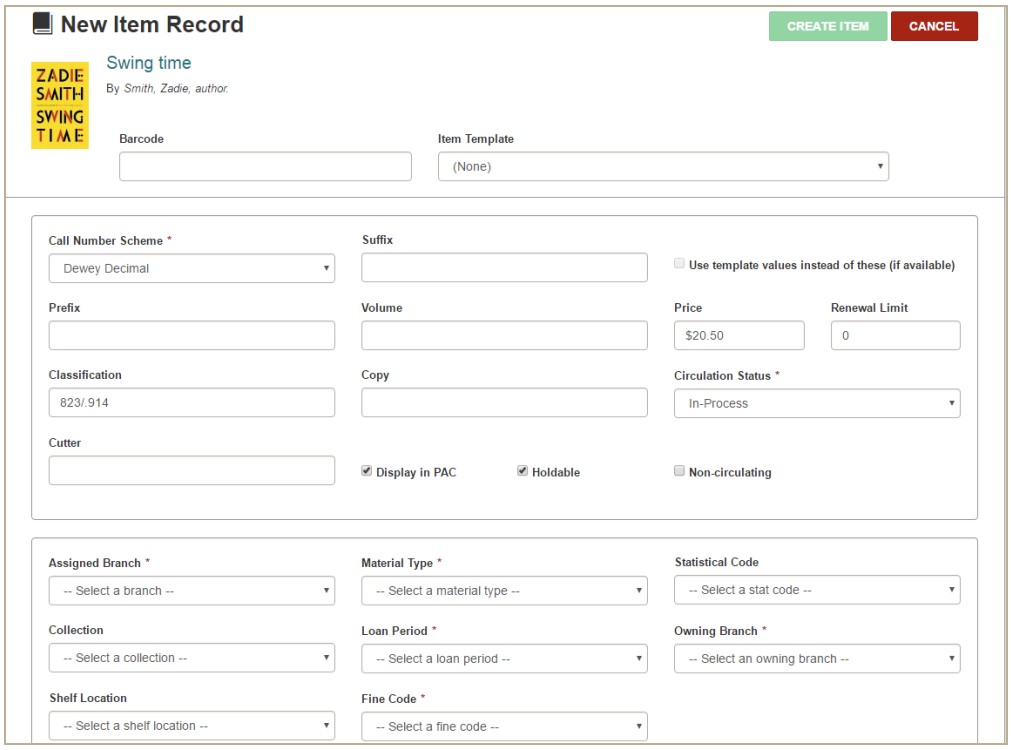
- Click **ACTIONS | Create Item**.



- Or, click **Items** to go to the Items view, and select **NEW ITEM**.



The New Item Record workform opens.



The fields in the New Item Record workform are displayed as follows:

- The required fields are noted with red asterisks.
- The call number scheme defaults to the shelving scheme set in the cataloging profile.
- The values in the **Classification** and **Cutter** fields are copied from the bibliographic record if the appropriate tag is identified in the Item Create Call Number hierarchy database table, and the cataloging profile Bring call number fields from bib to item record when link is made is set to Yes.
- The value in the **Price** field is copied from the bibliographic record if the appropriate tag is identified in the Item Create Price Hierarchy database table, and the cataloging profile, Bring price from bib to item record when link is made is set to Yes.
- The template list contains the templates you have access to based on the template owner. If you select a template and select **Use template values instead of these**, the template values are not displayed, but the item is created with the alternate values from the template. When you create a new item record and select **Use template values instead of these (if available)**, the following values, when present, are derived from the selected item template:
    - Call number scheme
    - Prefix
    - Classification
    - Cutter
    - Suffix

- Volume
- Copy
- Price
- Renewal Limit
- Display in PAC
- Holdable
- Non-circulating
- Circ status

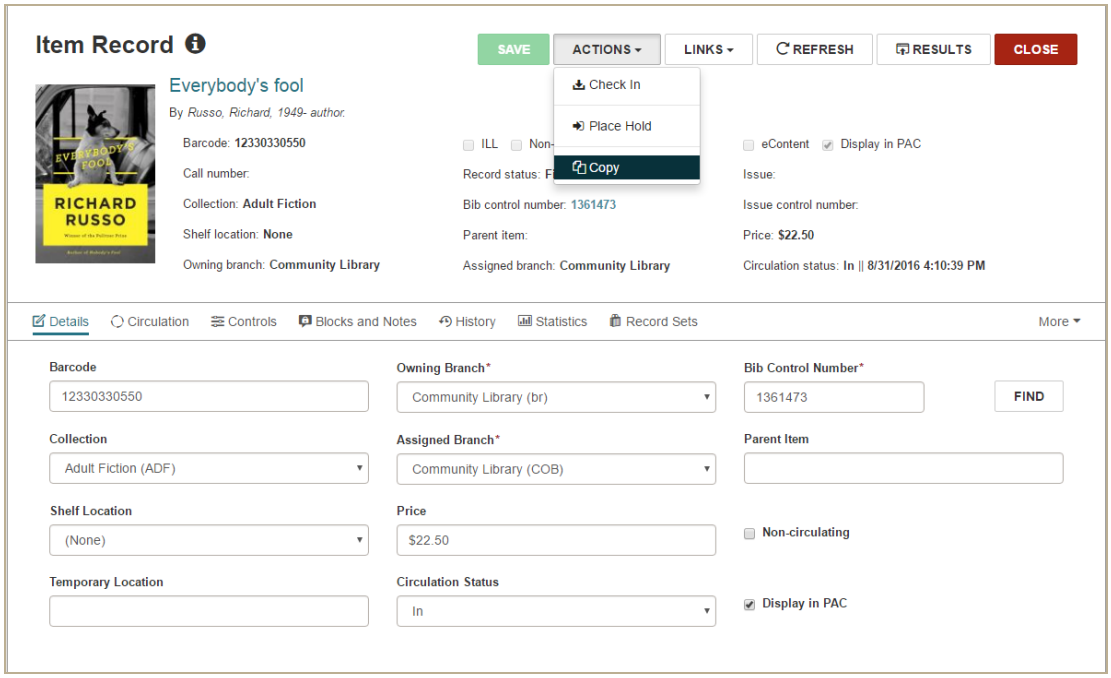
3. Enter the item barcode and other required information.
4. Click **CREATE ITEM**.

Copy an Item Record

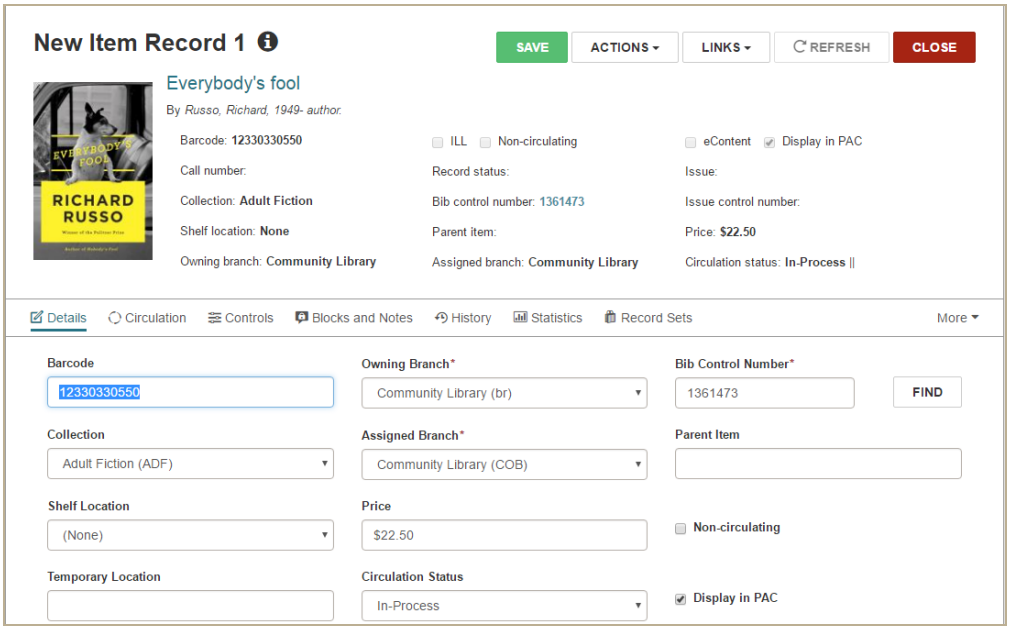
To create a new item record by copying an existing one:

1. Open the item record you want to copy.
2. Select **ACTIONS** | **Copy**.

Note:
If the item is for an electronic medium or the item is linked to a serial issue or standing order part, the option to copy the item record is not available.



The new Item Record workform opens.



The following information and settings are copied from the original record:

- Header - Most of the header information and settings are copied.

  Note:
  When you copy an item record, the **Circulation status** field in the New Item Record workform is filled automatically, but you can change it before saving the record.

  If the Cataloging profile, **Copied item records default to in-process**, is set to **Yes**, the **Circulation status** field is set to **In-process**.

  If the profile is set to **No**, the circulation status is retained from the copied record if it is: In, Missing, Withdrawn, Bindery, On-order, In-repair, or Unavailable. If the copied record has another circulation status, the **Circulation status** field in the New Item Record workform is set to **In-process**.

- Circulation view - Renewal limit
- Controls view - All the information and settings in this view are copied to the new item record.
- Blocks and Notes view - All blocks and notes are copied to the new item record except the System Block.
- History view - None
- Statistics view - None
- Record Sets view - None
- Notices view - None

- Source and Donor view - The information in the Funding Source field is copied; the other information on this view is not copied.

3. Enter or change information for the new item record.
4. Click **SAVE**.

   When the item record is saved, the Properties window is updated.

Modify an Item Record

If you have the required Polaris staff client permissions to edit item records, you can now modify item records in Leap. The Item Record workform now includes a new Details view for editing header information and a new Source and Acquisitions view for viewing and editing acquisitions and donor information. In addition, you can now update fields on the Controls view and the Blocks and Notes view. When you update fields on the Item Record workform, click **SAVE** to save your changes.

For more information on these new and updated views, see "Leap - Item Record Workform Updates" on page 125.

You can edit the following fields on the new Details view of the Item Record workform:

> **Note:**
> The following fields cannot be changed for electronic items: Non-circulating, Display in PAC, Barcode, Bib Control Number. The Find Tool is also disabled so you cannot search for and select a different bibliographic record.

- Barcode
- Collection
- Shelf Location
- Temporary Location
- Owning Branch
- Assigned Branch
- Price
- Circulation Status

  > **Note:**
  > If you change the item to an Unavailable status, and it is the last copy linked to that bib, you can uncheck the **Display in PAC** box on the Bibliographic Record workform. See "Editable Header Fields and a Save Button" on page 134.

- Bib Control Number - Type a different bib control number or click **FIND** to search for and select a different bibliographic records.
- Parent Item
- Display in PAC

You can edit the following fields on the Controls view of the Item Record workform:

- Material Type
- Loan Period
- Renewal Limit
- Statistical Code
- Home Branch

- Do not float
- Call Number Scheme
- Cutter
- Volume
- Prefix
- Suffix
- Copy
- Classification
- Name of Piece
- Loanable outside system
- Do not mail to patron
- Holdable
- To indicate limits on the holds, use the check boxes under Hold Limited To:
    - Pickup at this branch
    - Patron from this library and branches
    - Patrons from this branch only
    - Preferred borrowers

You can now edit the following fields on the Blocks and Notes view of the Item Record workform:

- Library Assigned Block
- Free Text Block
- Public Note
- Non-Public Note
- Physical Condition
- Special Item Check-In

You can edit the following fields on the new Source and Acquisitions view of the Item Record workform if the item record was not created from a purchase order:

- Funding source
- Donor First Name
- Middle
- Last Name
- Donor Organization

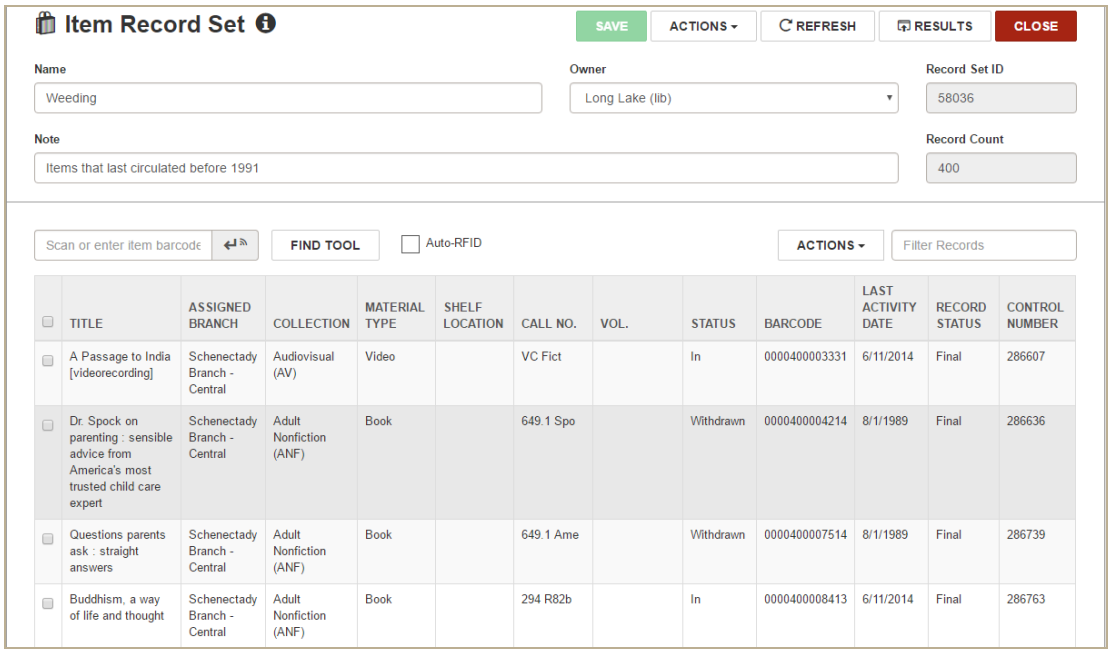
Leap - Cataloging Record Sets Implemented

If you have the required permissions in Polaris Administration, you can now search for, access, and modify bibliographic, item, and authority record sets in Leap. For information on searching for cataloging record sets in Leap, see "Search for Record Sets" on page 123.

Each cataloging record set is displayed in the appropriate workform according to record type. Regardless of the type, all record set workforms have the same header elements and a table view that lists the records. For information on a specific record set workform, see one of the following topics:

- "Leap - Bibliographic Record Sets" on page 114
- "Leap - Item Record Sets" on page 112
- "Leap - Authority Record Sets" on page 115

To access any cataloging record set, you must have the permission: Cataloging record sets: Access.



When a record set is opened, an object lock is applied. The lock is removed when the record is closed. If you attempt to open a record set that another user has open, the following message appears: **The record is being modified by [username]** and the record set opens in a read-only mode with a locked indicator to the right of the Info icon. All actions are disabled except for: **Refresh**, **Return to Results** and **Close**. However, you can still filter the contents or link to an item record from a locked Item Record Set workform.

If a record set is large, all the records may not be retrieved at once. You can click **MORE** at the bottom of a record set workform to view more records.

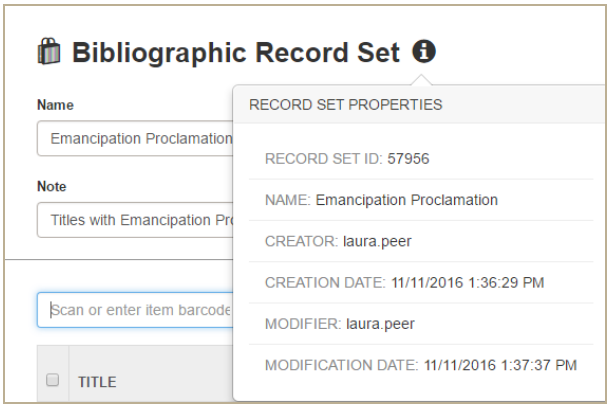
If you select multiple records to add to the record set, and some of the records are duplicates, only the unique records are added; any records identified as duplicates are not added to the record set, and the number of unique records added is displayed.

When you modify a record set, a *9004 Record set modified* transaction is logged.

Record Set Header Elements and Features

All Leap record set workforms have the following header elements:

- An Information icon that displays the record set properties: Record set ID, Name, Creator, Creation Date, Modifier, and Modification date.



- **SAVE**, **ACTIONS**, **REFRESH**, **RESULTS**, and **CLOSE** buttons.
- Editable fields - **Name**, **Owner**, and **Notes**
- Display-only fields - **Record Set ID** and **Record Count**

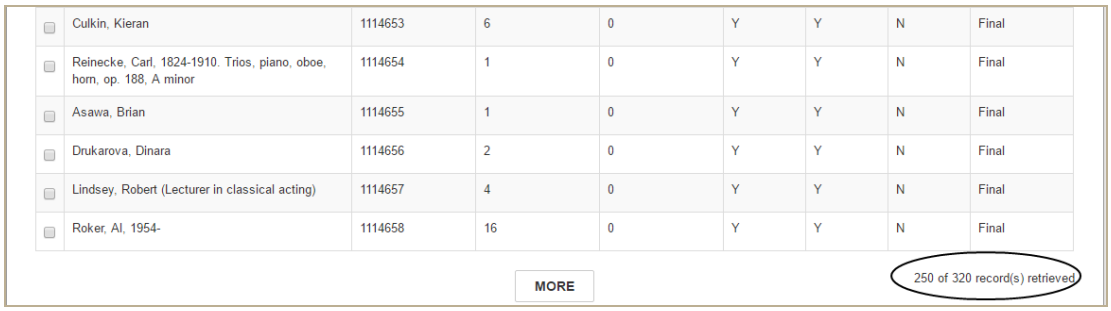
Record Set Table View

Below the workform header is a table listing the records belonging to the record set. The table columns vary according to the record type, but all record set workform table views have the following elements and features in common:

- **ACTIONS** menu - When at least one record is selected, you can select **Remove Selected Records**.
- **Filter Records** box - Start typing in the box to immediately filter the list.
- Sortable columns - Click a column header to sort the list
- Check boxes to select records - Click the check box to the left of the record, or click the check box in the column header to select all records.

- **FIND TOOL** button - Click the button to open the Find Tool and search for records to add to the record set. The Find Tool opens with the appropriate record type selected. When you select one or more records in the Find Tool results list, and click **OPEN**, the records are added to the record set except for any duplicate records.
- Links to listed records - Click a record listed in the table to open it. When you close the record, you are returned to the record set.

If a record set is large, the table view lists a portion of the records, and at the bottom of the table, a count indicates the number of records displayed out of the total number of records in the record set. You can click **MORE** to load more records to the table display.

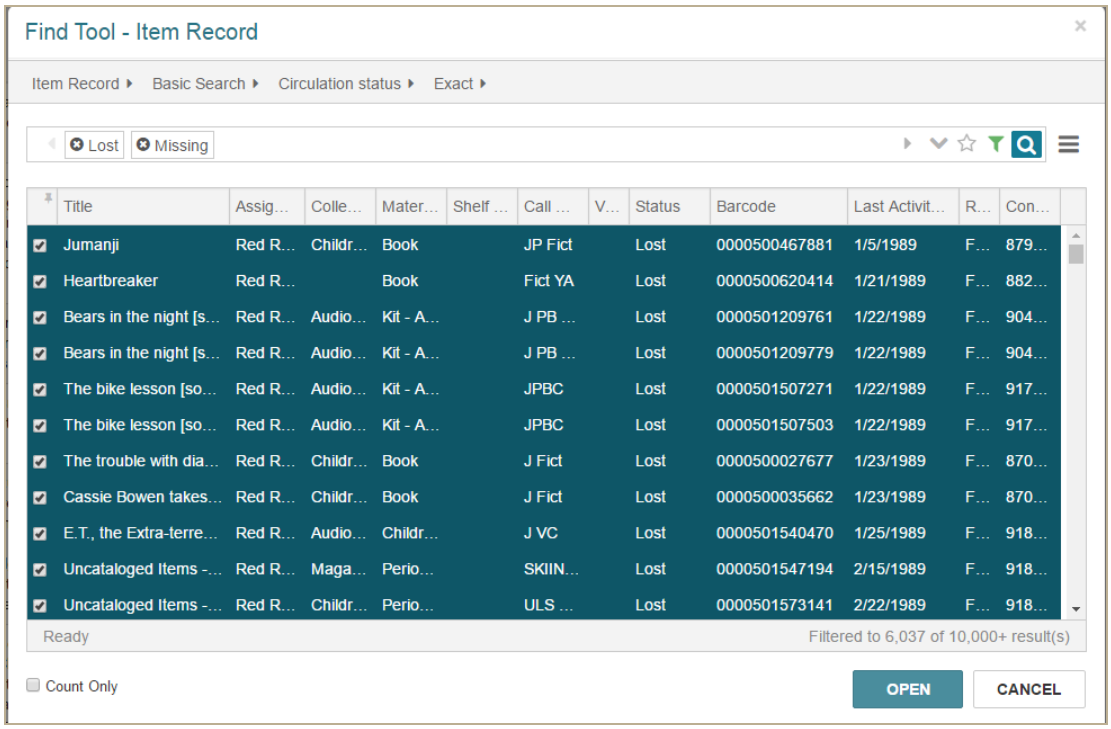


Modify a Record Set by Adding or Removing Records

If you have the required permissions, you can modify existing record sets in Leap by adding or removing records. As records are added or removed, the **Record Count** field is updated.

To remove records from any type of record set in Leap, select the records you want to remove, select **ACTIONS** above the table, and select **Remove Selected Records**. The records are removed from the record set, but the records remain in the Polaris database.

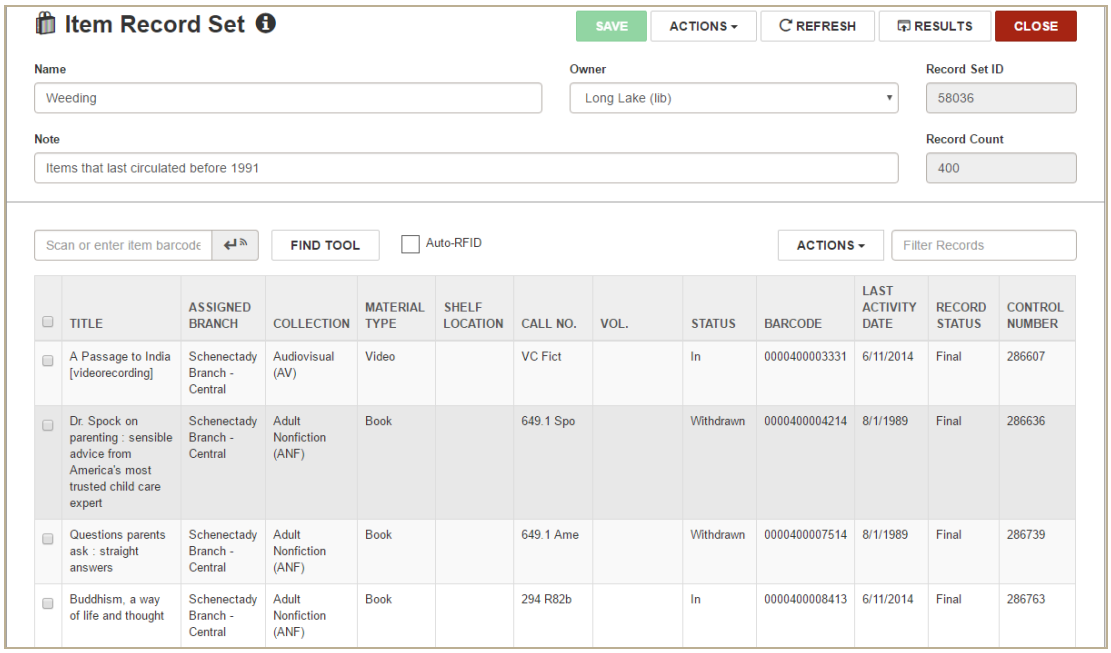
You can add records to any record set by clicking **FIND TOOL** from a record set and searching for the records using the Find Tool. When the Find Tool opens, the appropriate type of record is selected. In the Find Tool results list, you can select one or more records to add to the record set by clicking on the check boxes in the left column. When you select **OPEN**, the selected records are added to the record set. If any of the records being added already belong to the record set, a message informs you that duplicates were found and displays the number of records that were actually added.



For item and bibliographic record sets, you can add records by scanning an item barcode or RFID tag. If Auto-RFID is enabled for the workstation, and the **Auto-RFID** box is checked on the record set workform, records are added for any items that are automatically scanned. When an item is scanned from a bibliographic record set, the bibliographic record linked to the scanned item is added to the record set.

Leap - Item Record Sets

Item record sets are displayed in the Item Record Set workform. For general information on searching for, using, and modifying record sets in Leap, see "Leap - Cataloging Record Sets Implemented" on page 108.



The following columns appear in the table view of the Item Record Set workform:

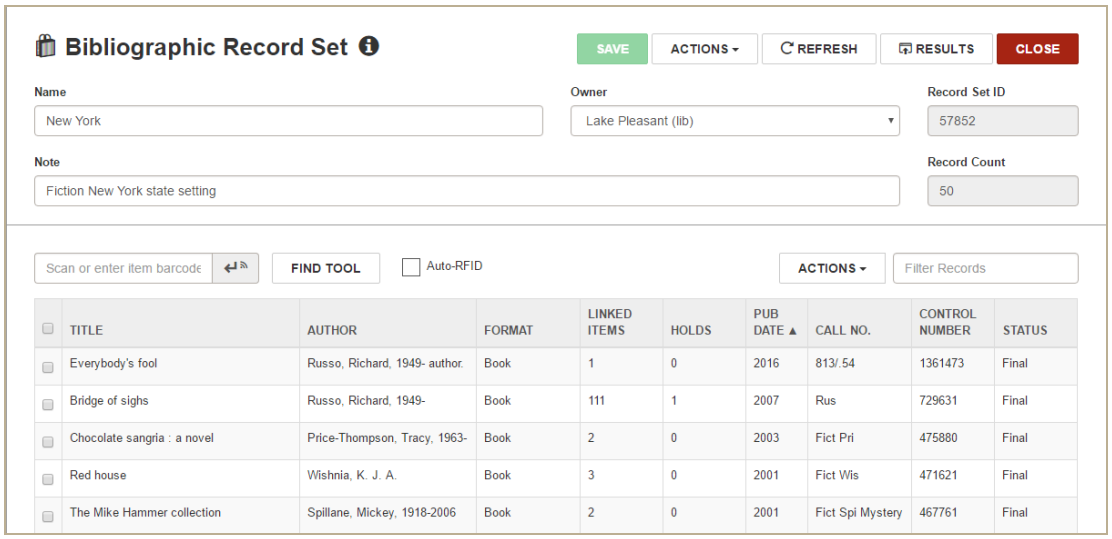
Note:
On an iPad or other tablet, the Call Number and Volume columns are combined and the Shelf Location column does not appear.

- Title
- Assigned Branch
- Collection
- Material Type
- Shelf Location
- Call Number
- Volume
- Status
- Barcode
- Last Activity Date
- Record Status
- Control Number

You can click on a record in this view to open the record in the Item Record workform. When you close the Item Record workform, you are returned to the Item Record Set workform.

Leap - Bibliographic Record Sets

You can now view and edit a bibliographic record set in the Bibliographic Record Set workform. If you have the required permissions, you can change the header information and add or remove records. For general information on searching for, using, and modifying record sets in Leap, see "Leap - Cataloging Record Sets Implemented" on page 108.



The bibliographic records belonging to the record set are listed in a table view with the following columns:

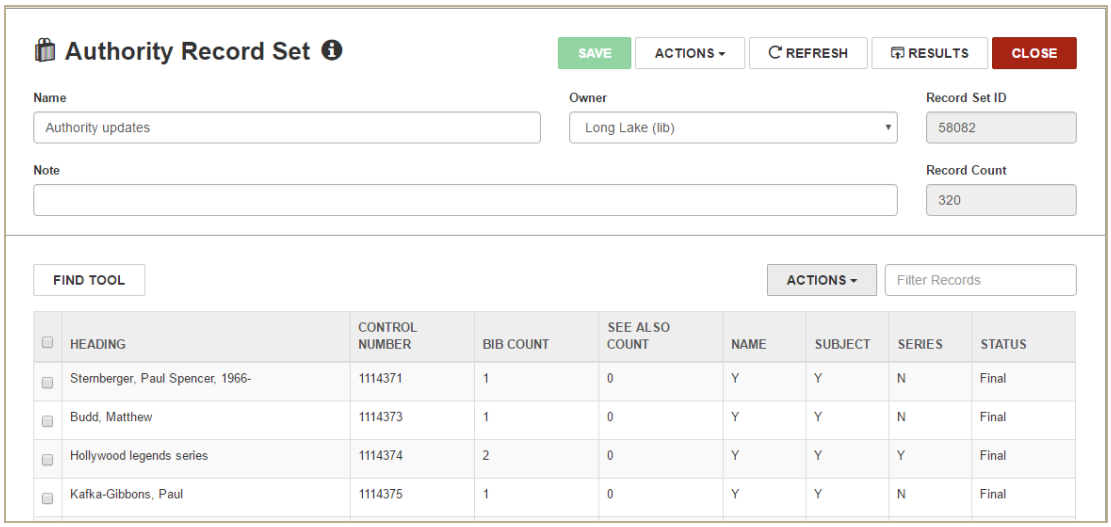
- Title
- Author
- Format
- Linked Items
- Holds
- Publication Date
- Call Number
- Control Number
- Record Status

You can click on a record in this view to open the record in the Bibliographic Record workform. When you close the Bibliographic Record workform, you are returned to the Bibliographic Record Set workform.

You can see all the record sets to which a bibliographic record belongs in the new Record Sets view of the Bibliographic Record workform. See "Leap - Bibliographic Record Workform Updates" on page 133.

Leap - Authority Record Sets

You can view and edit an authority record set in the Authority Record Set workform. If you have the required permissions, you can change the header information and add or remove records. For general information on searching for, using, and modifying record sets in Leap, see "Leap - Cataloging Record Sets Implemented" on page 108.



The authority records belonging to the record set appear in a table view with the following columns:

- Heading
- Control Number
- Bib Count
- See Also Count
- Name
- Subject
- Series
- Status

You can click on a record in this view to open the record in the Authority Record workform. When you close the Authority Record workform, you are returned to the Authority Record Set workform.

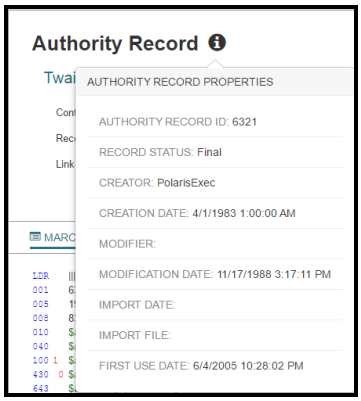
Leap - Authority Records Implemented

You can now search for, access, and link to authority records in Polaris Leap. Authority records cannot be created or modified using Leap. For information on searching for authority records, see "Search for Authority Records" on page 122.

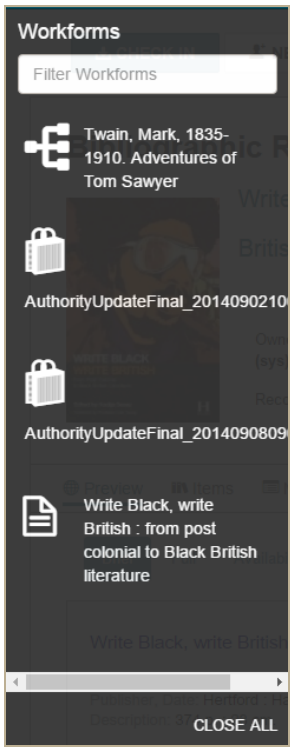
Authority Record Workform

The Authority Record workform header displays the heading, control number, kind of record, main or added entry use, record status, descriptive cataloging rules, subject use, linked bib count, subject heading system, and series use. You can return to the Find Tool results list by clicking **RESULTS** and refresh the workform by clicking **REFRESH**.

To see the authority record's properties, you can hover over the information icon.

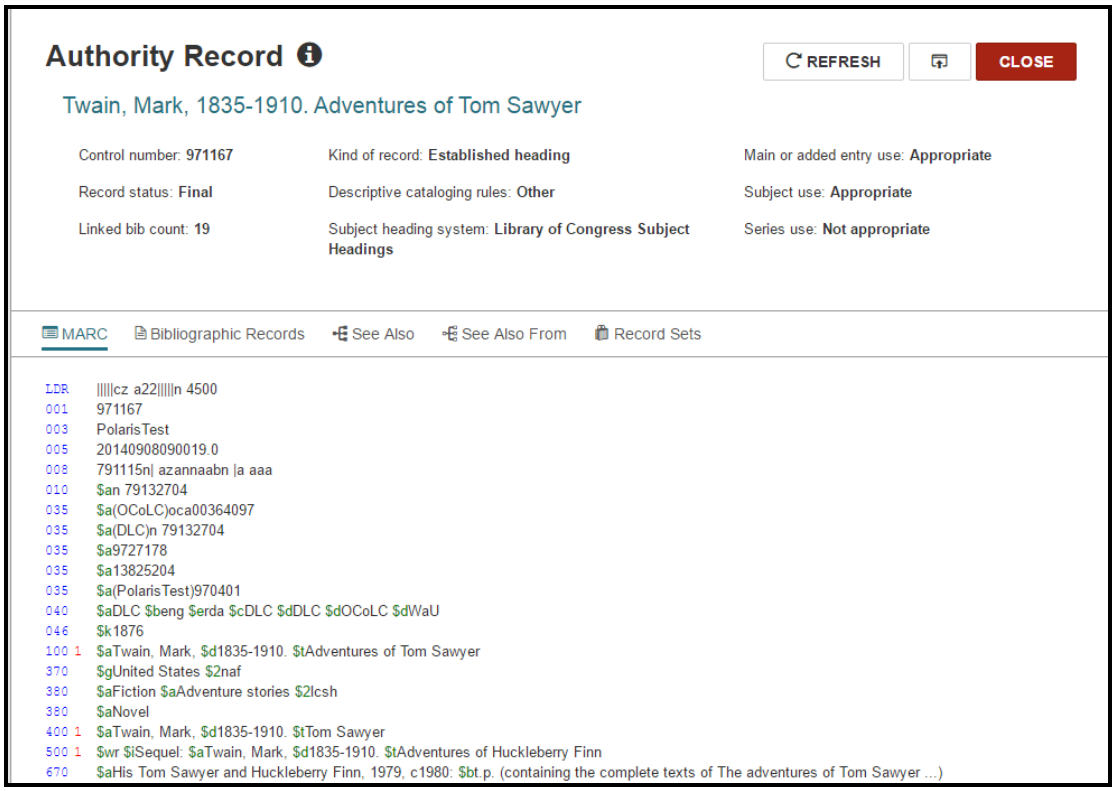


When you have opened an authority record, it appears in the workform tracker where you can click on the record to return to it.


Workforms
Filter Workforms
Twain, Mark, 1835-1910. Adventures of Tom Sawyer
AuthorityUpdateFinal_2014090210
AuthorityUpdateFinal_2014090809
Write Black, write British : from post colonial to Black British literature
CLOSE ALL

Authority Record Workform - MARC View

When the authority record workform first opens, the MARC view appears.

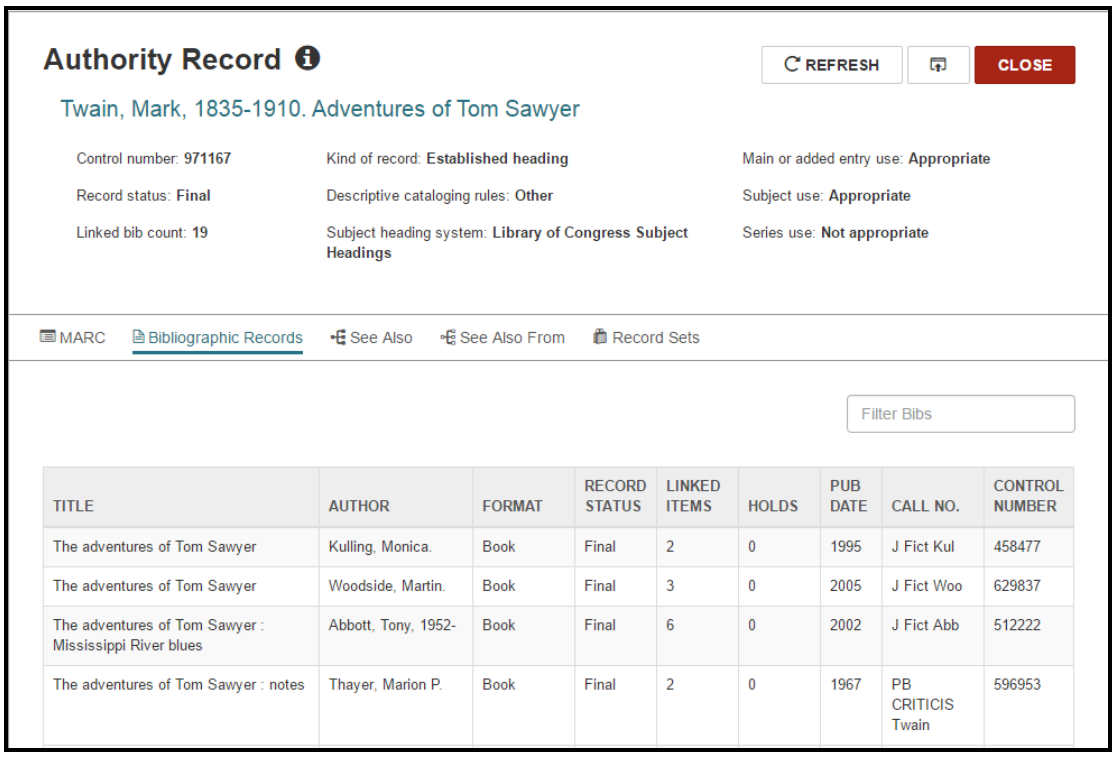


Note:
The leader data returned by the API for position 9 (character coding scheme) is hard coded to UCS/Unicode. This may not match what is displayed in the Authority Record workform in the staff client. However, if the MARC record is exported to a file, the export utility sets the value to either MARC8 or UTF8.

Authority Record Workform - Bibliographic Records View

The Bibliographic Records view displays the bibliographic records linked to the authority record in the following columns:

Title | Author | Format | Record Status | Linked Items | Holds | Publication Date | Call Number | Control Number



TITLE	AUTHOR	FORMAT	RECORD STATUS	LINKED ITEMS	HOLDS	PUB DATE	CALL NO.	CONTROL NUMBER
The adventures of Tom Sawyer	Kulling, Monica.	Book	Final	2	0	1995	J Fict Kul	458477
The adventures of Tom Sawyer	Woodside, Martin.	Book	Final	3	0	2005	J Fict Woo	629837
The adventures of Tom Sawyer : Mississippi River blues	Abbott, Tony, 1952-	Book	Final	6	0	2002	J Fict Abb	512222
The adventures of Tom Sawyer : notes	Thayer, Marion P.	Book	Final	2	0	1967	PB CRITICIS Twain	596953

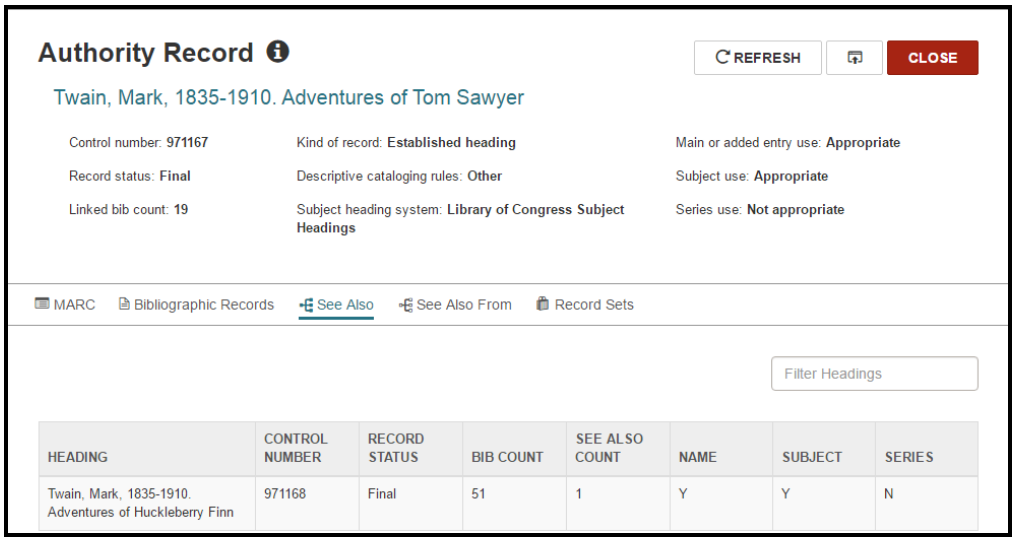
You can open a linked bibliographic record by clicking a list entry and then close the bibliographic record to return to this view.

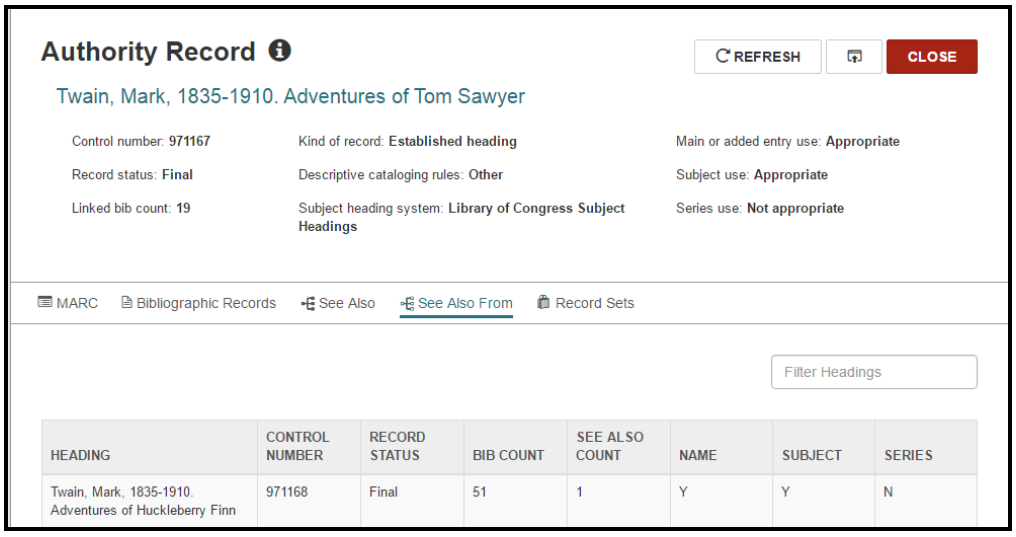
Authority Record Workform - See Also and See Also From Views

The See Also view displays the See Also references from the heading. The following message appears if there are no linked records: **There are no "See also" authority records linked to this authority record.** The See Also From view appears only if there are "See Also From" 550 fields in the record.

The See Also view displays the linked authority records in the following columns:

Heading | Control Number | Record Status | Bib Count | See Also Count | Name | Subject | Series





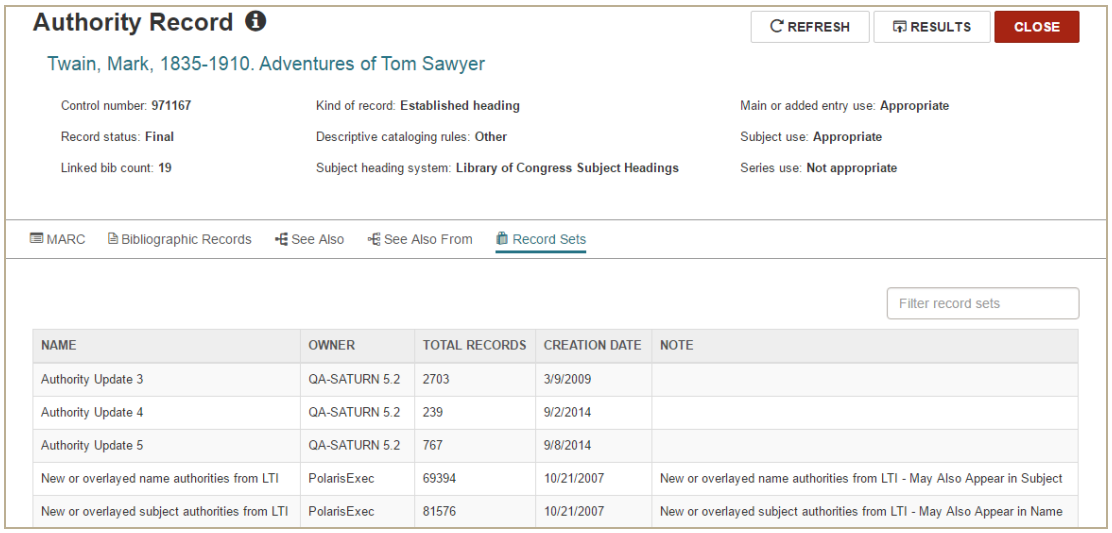
You can sort and filter the list and click a row to open the linked authority record.

Authority Record Workform - Record Sets View

The new Authority Record workform includes a Record Sets view that displays the record sets to which the authority record belongs, if any. See also "Leap - Authority Record Sets" on page 115.

The linked authority record sets are displayed in the following columns:

- Name
- Owner
- Total Records
- Creation Date
- Note



All record sets to which the record belongs appear in this view regardless of ownership. However, you can access only those record sets for which you have the required permissions. If you do not have permission, the following message appears: **You do not have ownership rights to open this record set.**

You can click on a record set to open it in the Authority Record Set workform. When you close the Authority Record Set workform, you return to this view.

Leap - Find Tool Updates

The following updates were made to the Leap Find Tool.

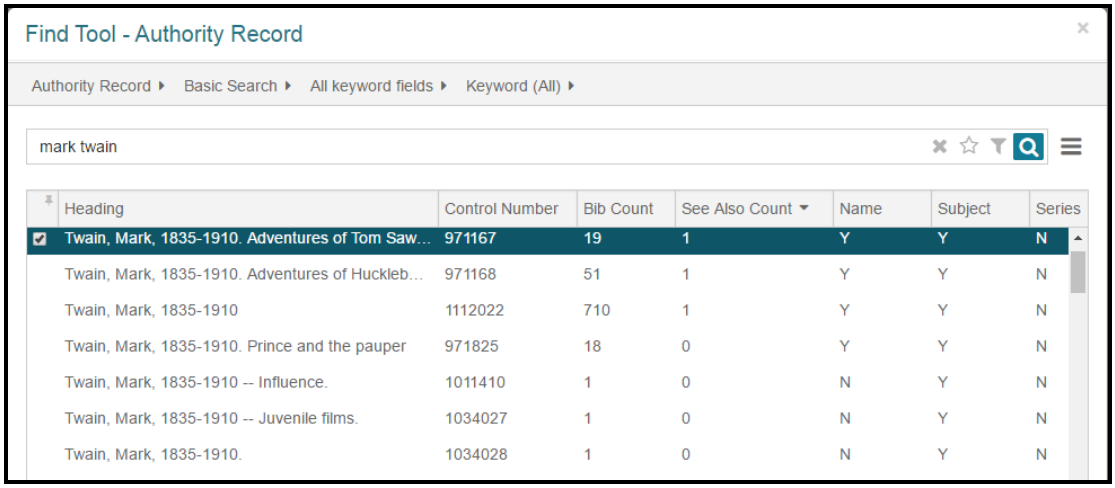
Search for Authority Records

You can search for authority records in Polaris Leap using the same search filters as in the Polaris staff client. For more information on authority records in Leap, see "Leap - Authority Records Implemented" on page 116.

> **Note:**
> If the System-level only Staff Client profile **Find Tool: Filter search results by permission** is set to **Yes** in Polaris Administration, users see only the authority records to which they have access. If the profile is set to **No**, then the Find Tool returns all records that satisfy the search criteria.

When the authority record search results are returned, they appear in the following sortable columns:

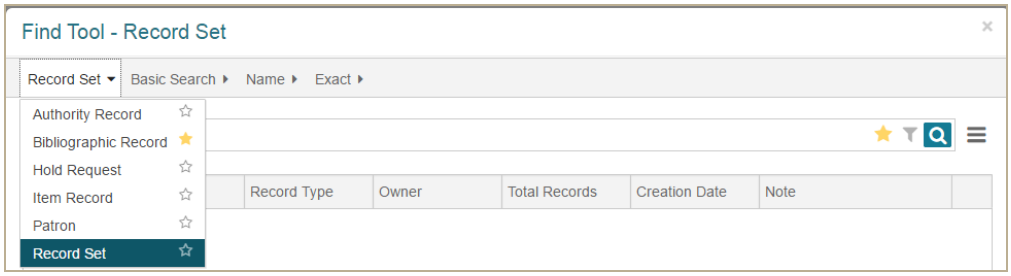
Heading | Control Number | Bib Count | See Also Count | Name | Subject | Series



The Find Tool options available for other records have been implemented for authority records, including the ability to: get a quick count of records; save search criteria and column settings; power search and save power searches; search using SQL and create SQL search queries (with the appropriate permission); and sort search results.

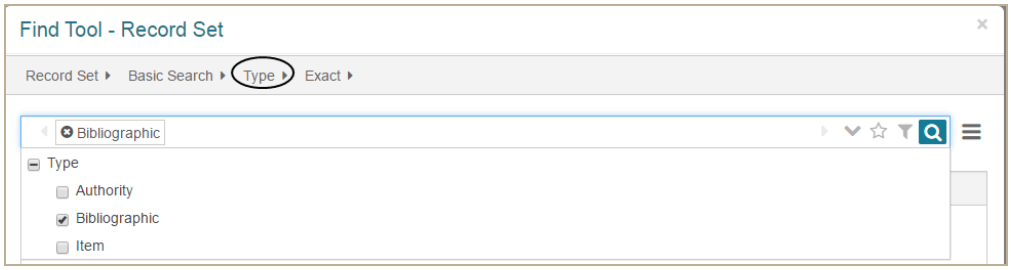
Search for Record Sets

To search for record sets in Leap, open the Find Tool and select **Record Set** from the Search Database drop-down list. For more information on record sets in Leap, see "Leap - Cataloging Record Sets Implemented" on page 108.



You can do a basic search, a power search, or an SQL search for record sets. If the selected search mode is Basic Search, you can search by Name (the default qualifier), Creation date, Owner, Record set ID, or Type.

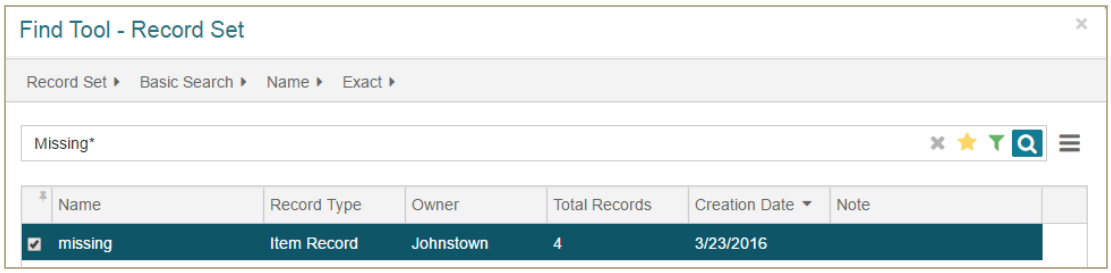
If you select **Type** from the Qualifier drop-down list, the record set type check boxes appear. You can select one or more check boxes.



To further narrow your record set search, you can apply one or more of the following search filters: **Creation date**, **Name,Owner**, **Record Set ID**, or **Type**.

The search results appear in the following default sortable columns:

Name | Record Type | Owner | Total Records | Creation Date | Note



You can select **Column Settings** in the **Options** menu and change the columns and the order in which they appear.

You can save the search criteria, including filters and column settings, as your user default when searching for record sets.

Access the Find Tool from a Record Set to Add Records

You can click **FIND TOOL** from a record set to search for records and add them to the record set. See "Modify a Record Set by Adding or Removing Records" on page 110.

Leap - Item Record Workform Updates

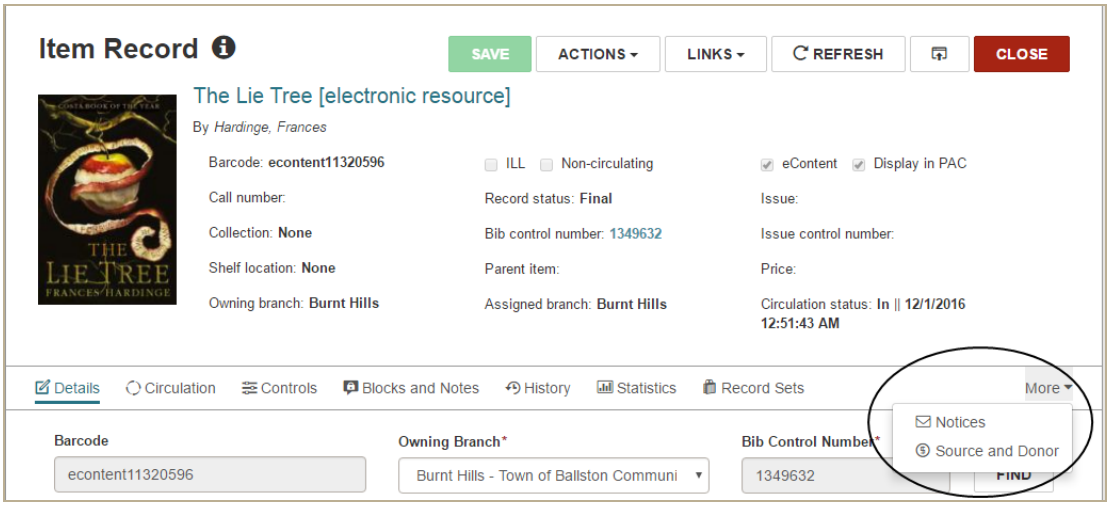
The Item Record workform now includes new views and editable fields, new menu options, a properties window, and other updates.

Actions Menu Includes Copy Option

The **ACTIONS** menu now includes a **Copy** option. See "Copy an Item Record" on page 103.

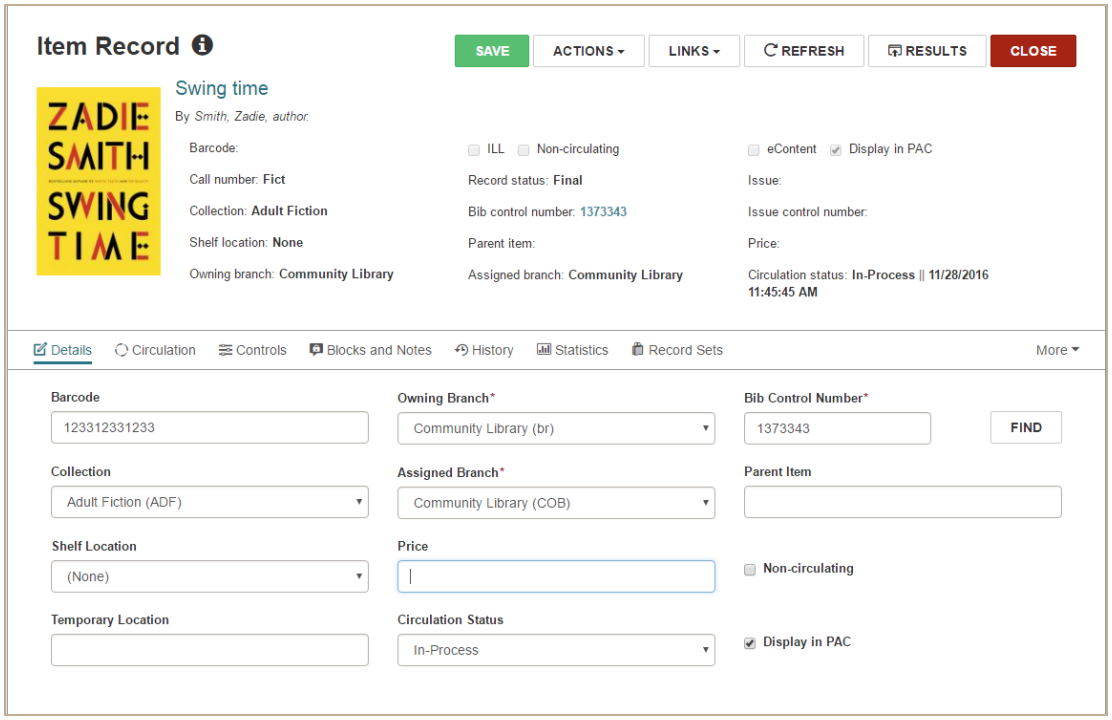
More Menu Added

The Notices view and the new Source and Donor view of the Item Record workform are available under the new More menu.



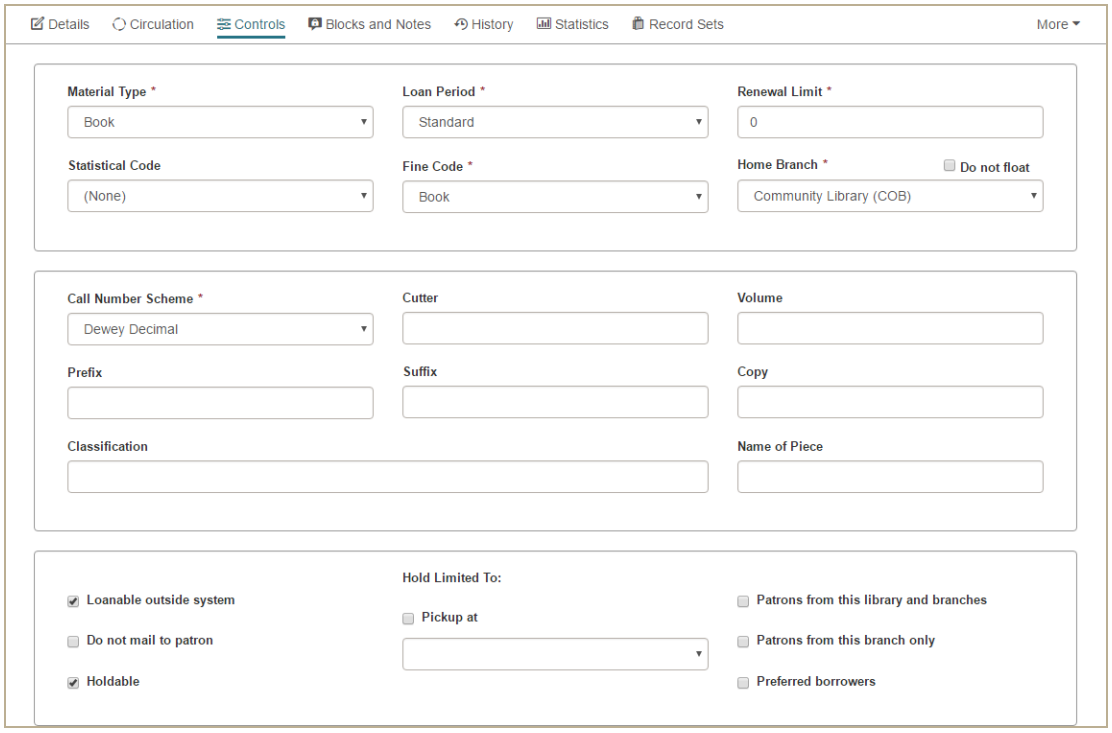
New Details View

The Item Record workform contains a new Details view for modifying header information. See "Modify an Item Record" on page 106.



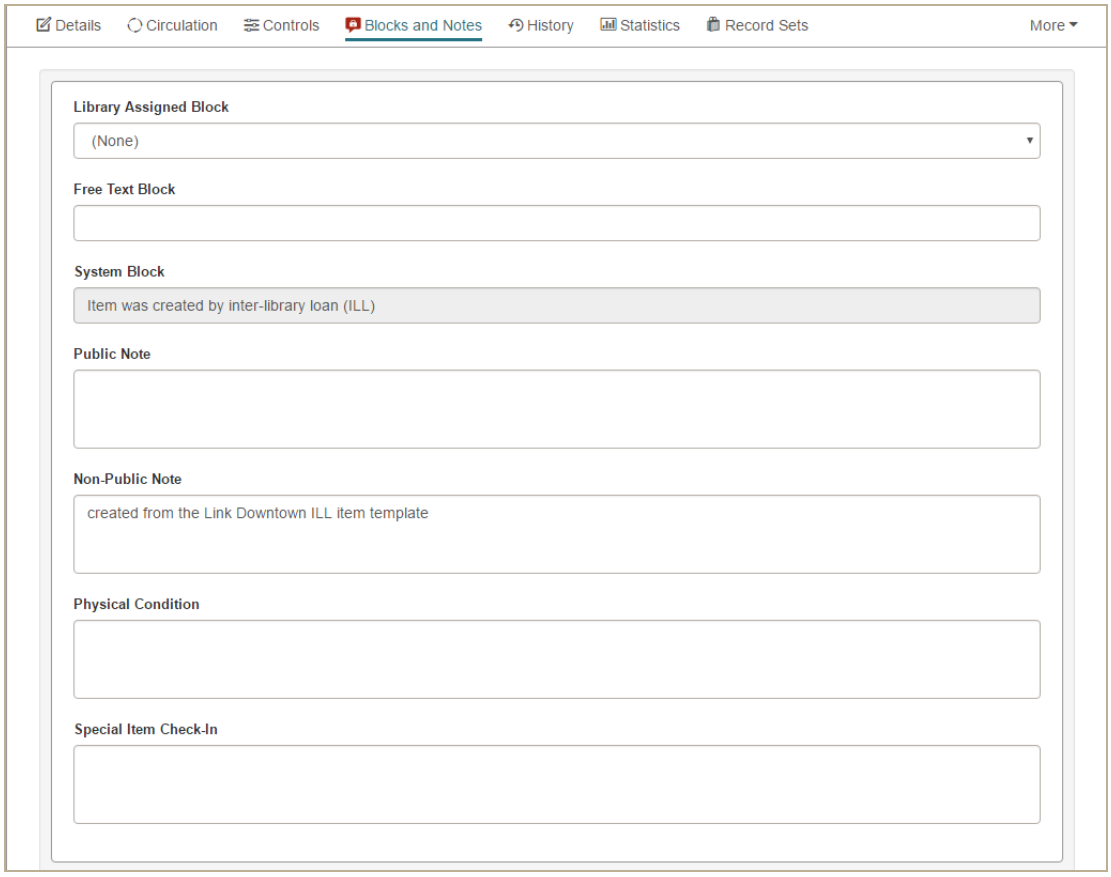
Editable Fields on the Controls View

If you have the required permissions in Polaris Administration, you can now edit fields on the Controls view of the Item Record workform. See "Modify an Item Record" on page 106.



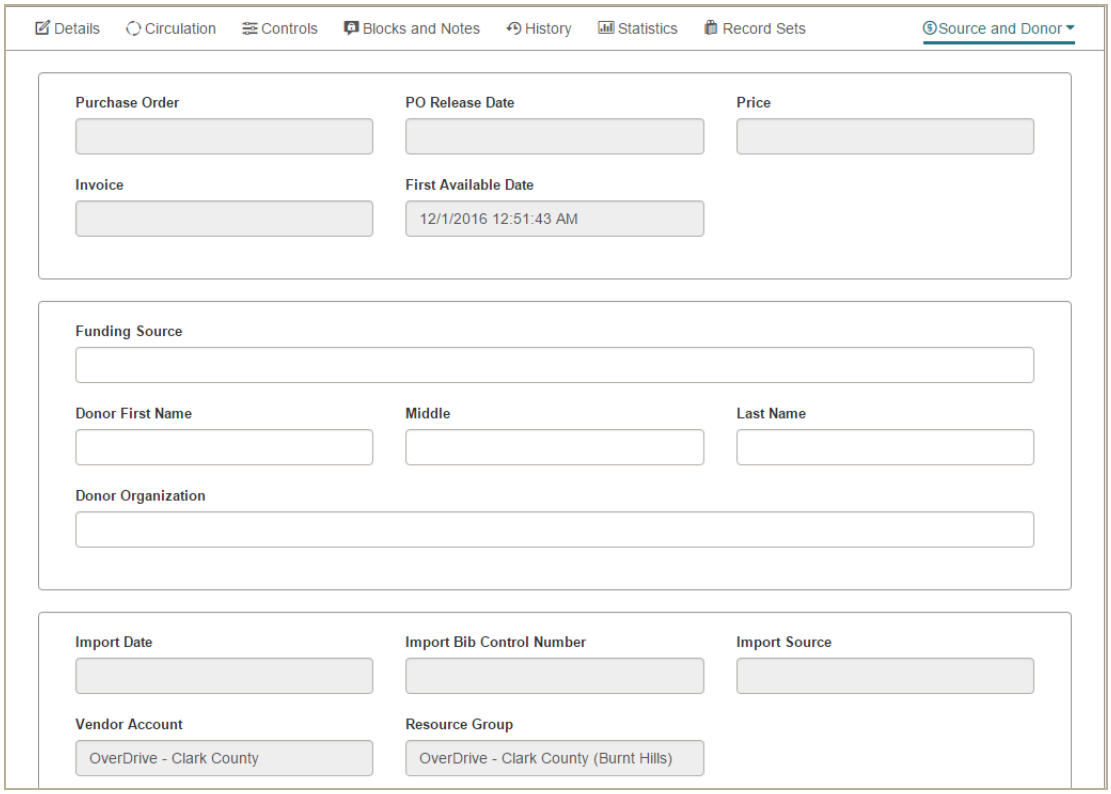
Editable Fields on the Notes and Blocks View

If you have the required permissions in Polaris Administration, you can now edit fields on the Notes and Blocks view of the Item Record workform. See "Modify an Item Record" on page 106.



New Source and Donor View

The Item Record workform includes a new Source and Donor view under the new More menu. See "Modify an Item Record" on page 106.



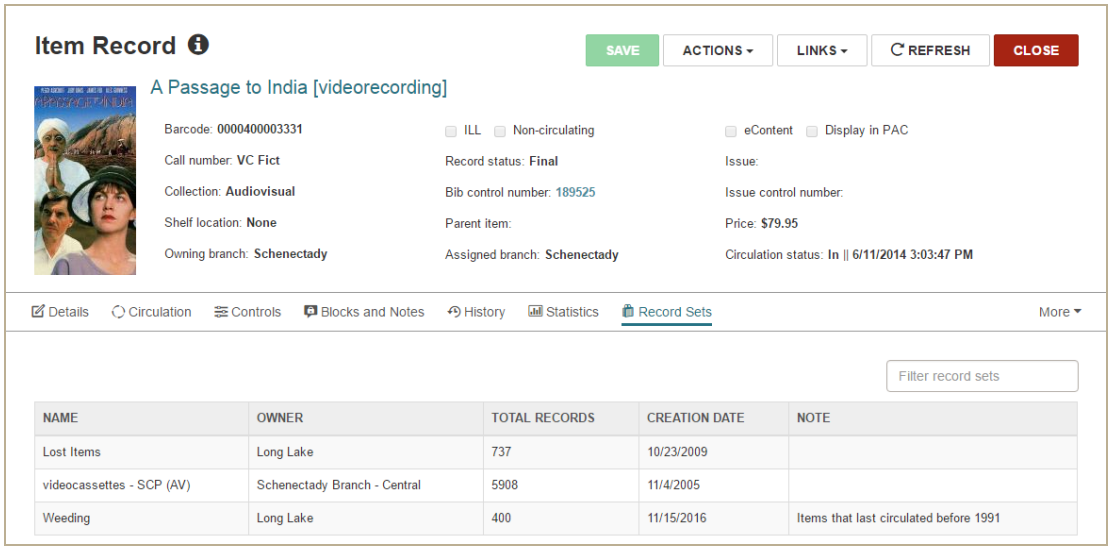
New Record Sets View

The new Record Sets view of the Item Record workform displays a table listing all the record sets to which the item record belongs. You can click on a record set to open the Item Record Set workform. When you close the workform, you are returned to this view. If you do not have the required permissions for the record set, an error message appears.

For more information, see "Leap - Item Record Sets" on page 112.

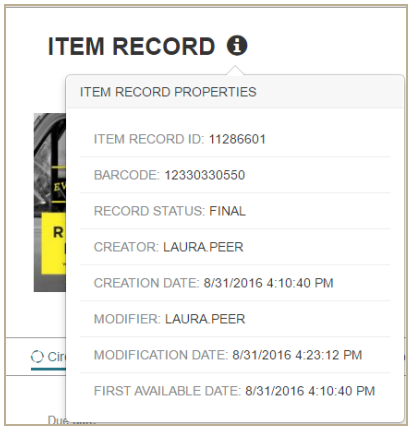
The linked item record sets are displayed in the following columns:

- Name
- Owner
- Total Records
- Creation Date
- Note



Info Icon and Properties Window

The information icon and properties window were added to the Item Record Workform. When you hover over the information icon, the Item Record Properties window appears.

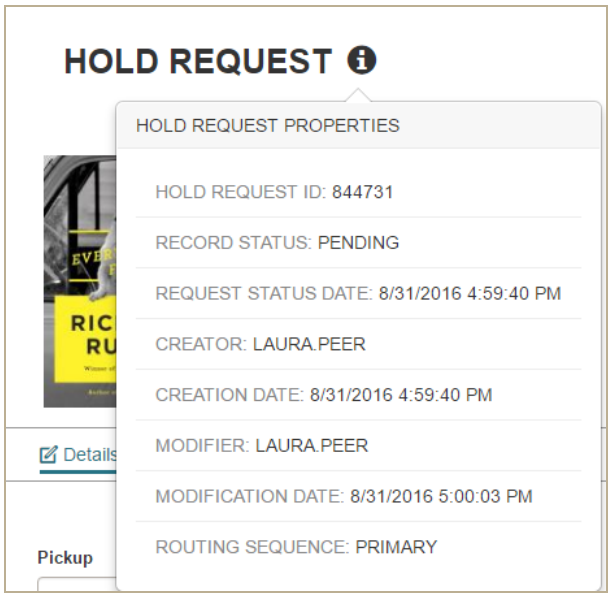


The Item Record Properties window displays the following information:

- Item Record ID
- Barcode
- Record Status
- Creator
- Creation Date
- Modifier
- Modification Date
- First Available Date

Leap - Hold Request Updates

The information icon and properties window were added to the Hold Request workform. When you hover over the icon, the Hold Request Properties window appears.



The Hold Request Properties window displays the following information:

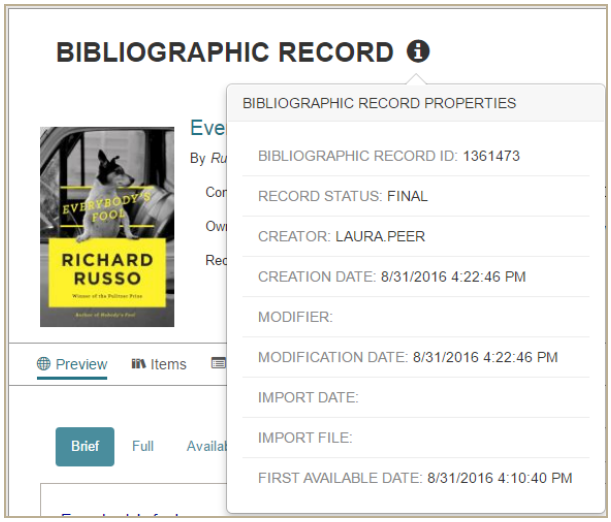
- Hold Request ID
- Record Status
- Request Status Date
- Creator
- Creation Date
- Modifier
- Modification Date
- Routing Sequence

Leap - Bibliographic Record Workform Updates

The following updates were made to the Bibliographic Record workform.

Information Icon and Properties Window Added

The information icon and properties window were added to the Bibliographic Record workform. When you hover over the information icon, the Bibliographic Record Properties window appears.



The Bibliographic Record Properties window displays the following information:

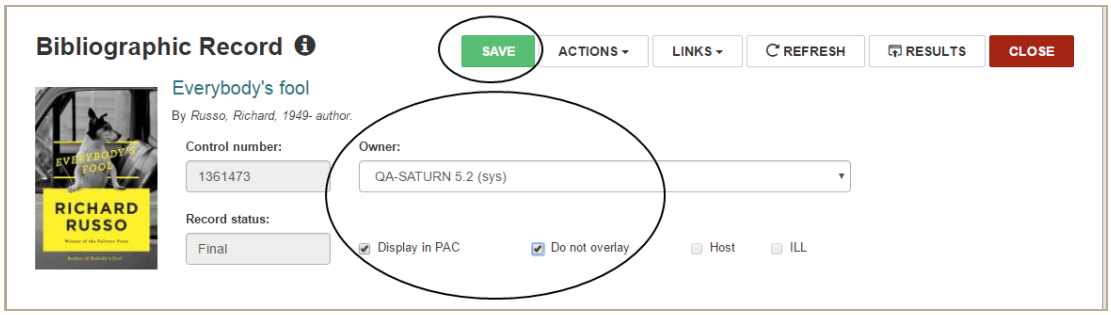
- Bibliographic Record ID
- Record Status
- Creator
- Creation Date
- Modifier
- Modification Date
- Import Date
- Import file
- First Available Date

Editable Header Fields and a Save Button

If you have the required permissions, you can now edit the following header elements on the Bibliographic Record workform:

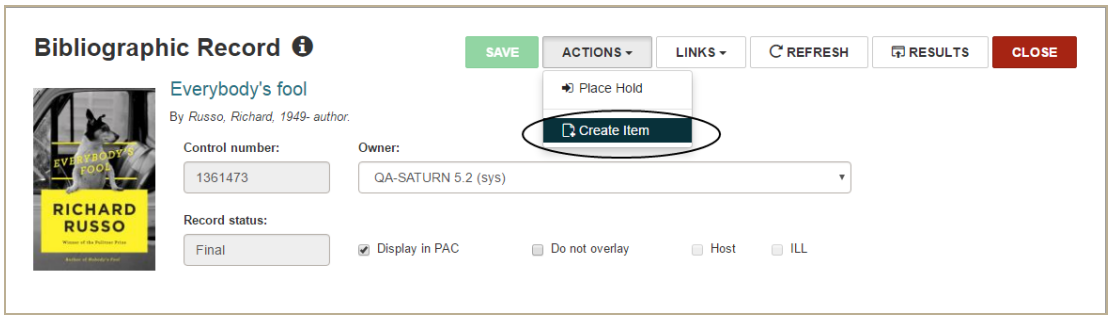
- Owner
- Display in PAC
- Do not overlay

You can then click **SAVE** to save the bibliographic record.



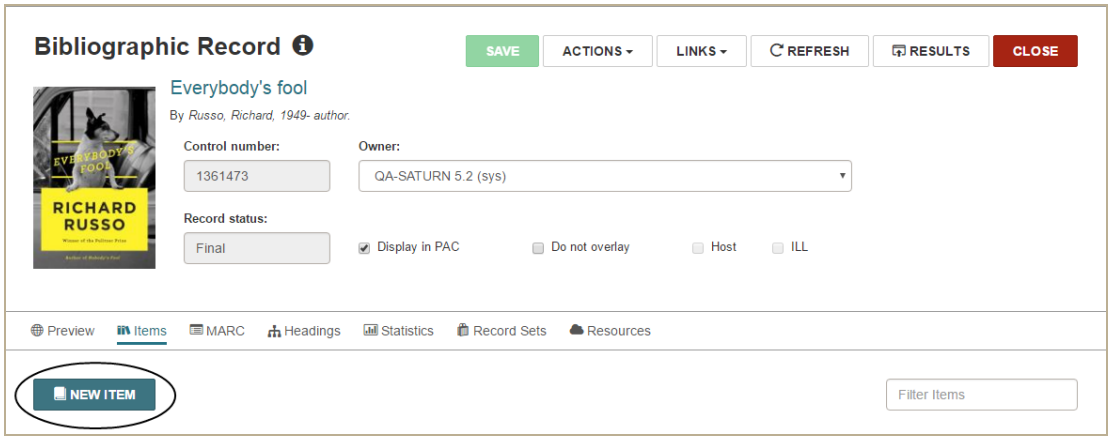
Actions Menu with Create Item Record Option

The **ACTIONS** menu in the workform header now includes the **Create Item** option. For information on creating new item records in Leap, see "Leap - Create, Copy, and Modify Item Records" on page 99.



New Item Button on the Items View

The Items view now has a **NEW ITEM** button that you can click to add a new item linked to the bibliographic record. For information on creating new item records in Leap, see "Leap - Create, Copy, and Modify Item Records" on page 99.



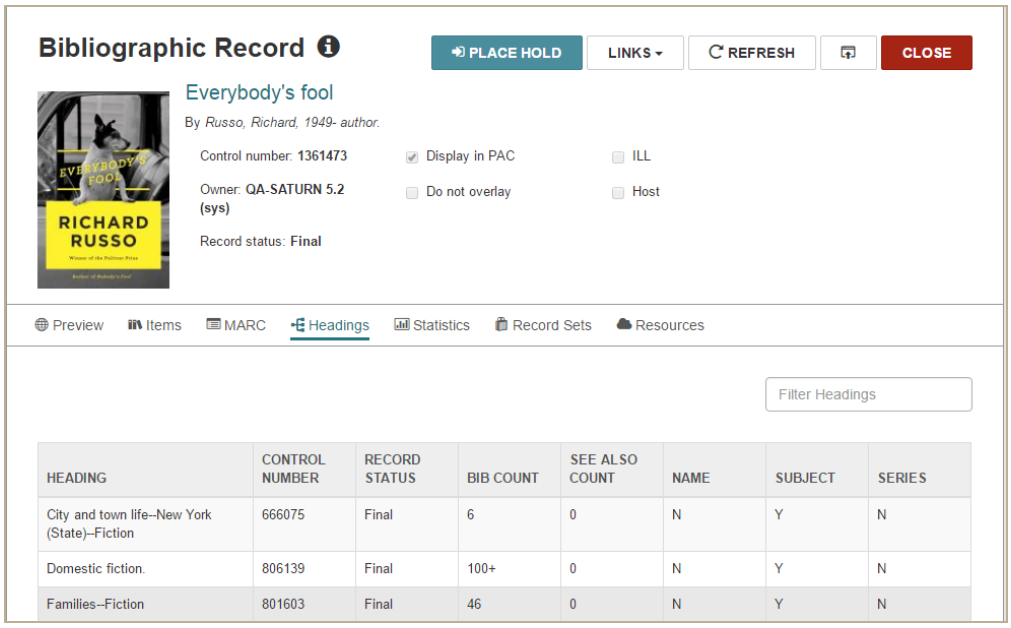
New Headings View

The new Headings view of the Bibliographic Record workform displays the headings linked to the bibliographic record in the following columns:

Heading | Control Number | Record Status | Bib Count | See Also Count | Name | Subject | Series

> **Note:**
> When you click Headings, the following message appears if there are no linked authority records: **No authority headings exist for this record.**

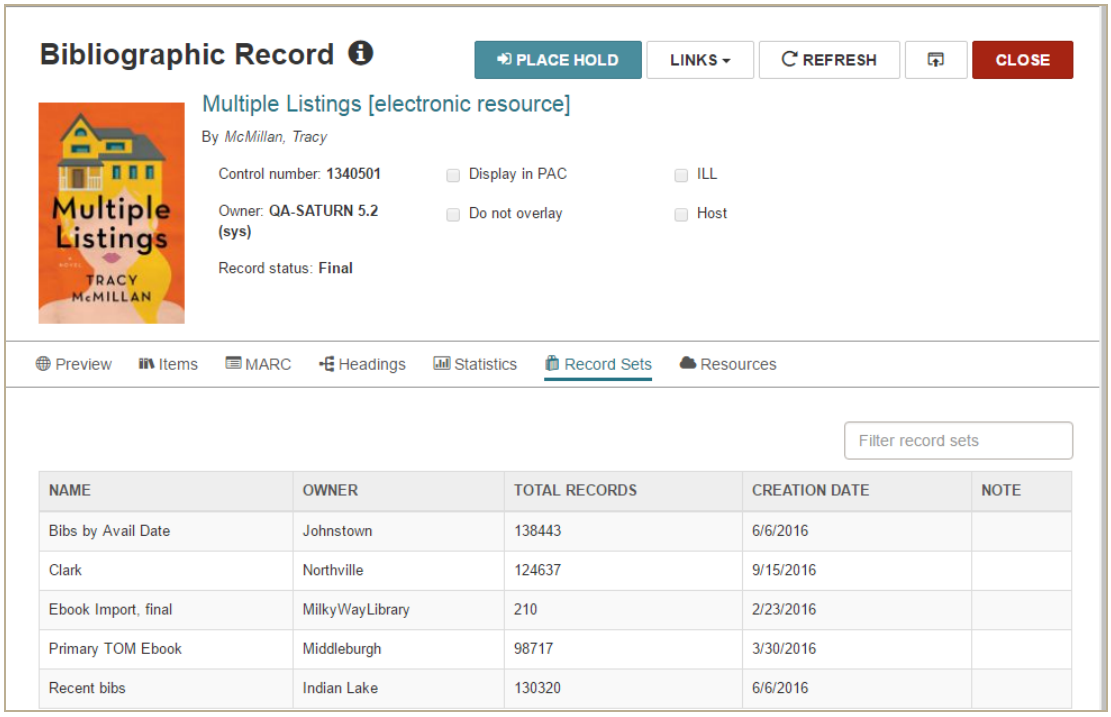
You can click a heading to go to the linked authority record. When you close the linked authority record, you return to this Headings view.


Bibliographic Record
PLACE HOLD
LINKS
REFRESH
CLOSE
Everybody's fool
By Russo, Richard, 1949- author.
Control number: 1361473
Display in PAC
ILL
Owner: QA-SATURN 5.2 (sys)
Do not overlay
Host
Record status: Final
Preview
Items
MARC
Headings
Statistics
Record Sets
Resources
Filter Headings
HEADING
CONTROL NUMBER
RECORD STATUS
BIB COUNT
SEE ALSO COUNT
NAME
SUBJECT
SERIES
City and town life--New York (State)--Fiction
666075
Final
6
0
N
Y
N
Domestic fiction.
806139
Final
100+
0
N
Y
N
Families--Fiction
801603
Final
46
0
N
Y
N

New Record Sets View

The new Record Sets view of the Bibliographic Record workform displays a table view of any record sets to which the bibliographic record belongs. The linked bibliographic record sets are displayed in the following columns:

- Name
- Owner
- Total Records
- Creation Date
- Note



All record sets appear in this view regardless of ownership. However, you can access only those record sets for which you have the required permissions. If you do not have permission, the following message appears: **You do not have ownership rights to open this record set.**

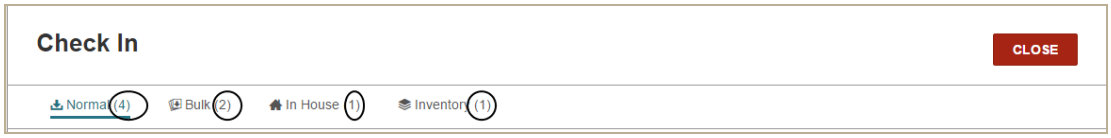
You can click on a record set to open it in the Bibliographic Record Set workform. When you close the workform, you return to this view.

Check In Workform Updates

The following updates were made to the Check In workform.

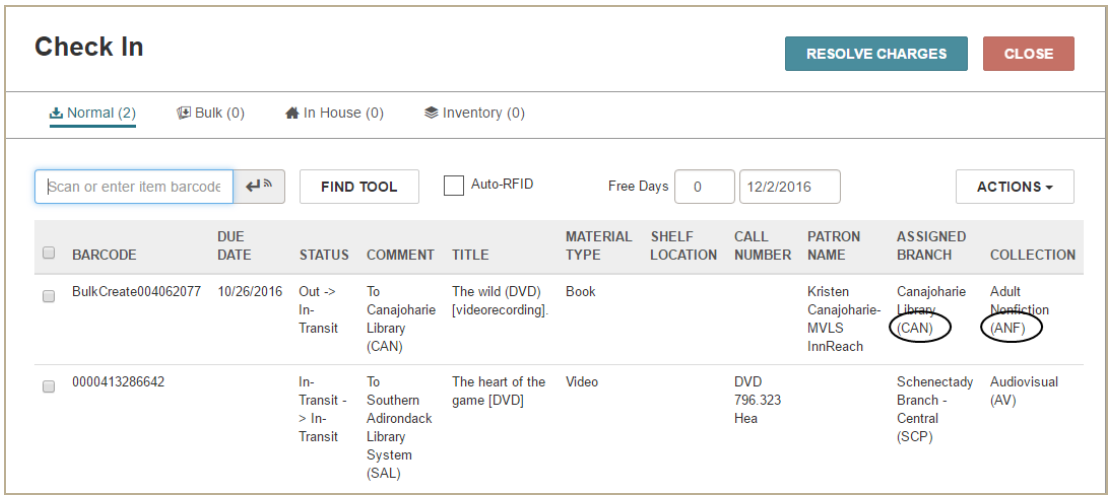
Count of Checked-In Items

The Check In workform displays a count of the checked in items in all modes (normal, bulk, in-house, and inventory).



Branch and Collection Abbreviations

On the Normal and Bulk views of the Check In workform, the branch abbreviation appears along with the branch name, and the collection abbreviation appears along with the collection name.

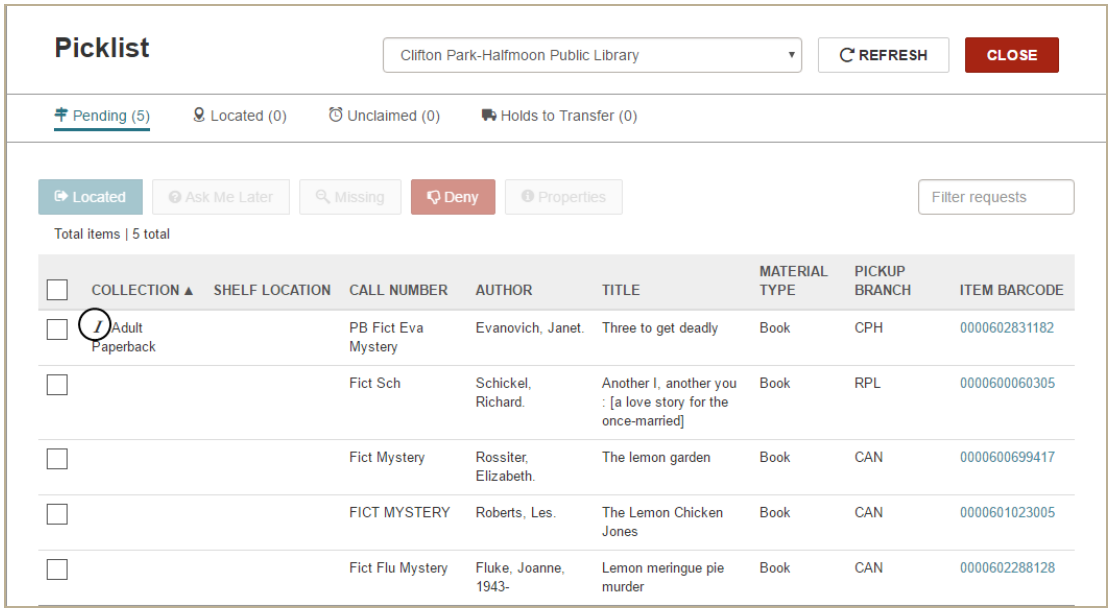


Leap - Picklist Updates

The following updates were made to the Picklist workform and processing.

INN-Reach Requests Identified with New Icon

Staff members who handle items requested through INN-Reach can now easily identify these items in the Picklist. Any items in the Picklist that were requested through INN-Reach are identified with a new icon.



New Item History Action for Item Circulation Status Changes from Picklist

When an item is declared missing from the Picklist in Leap, a new item record history action **Circulation status modified via Picklist processing** is posted to the Item History.

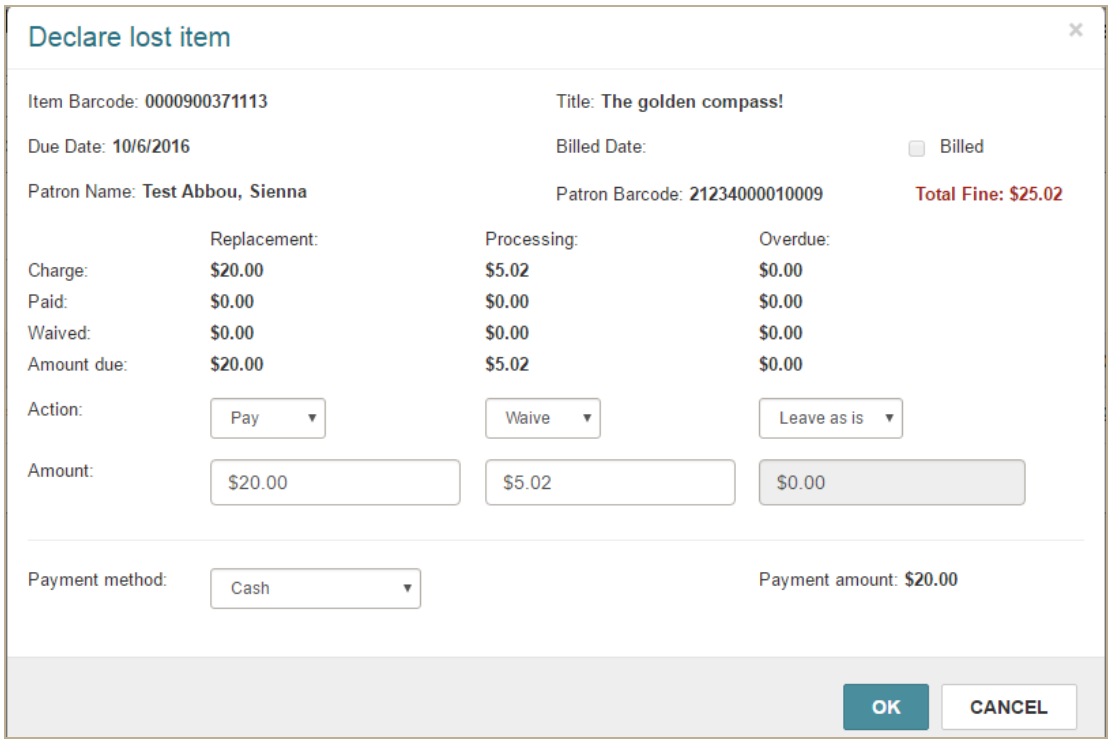
Modify Circulation Status Permission at the Library and Branch Levels

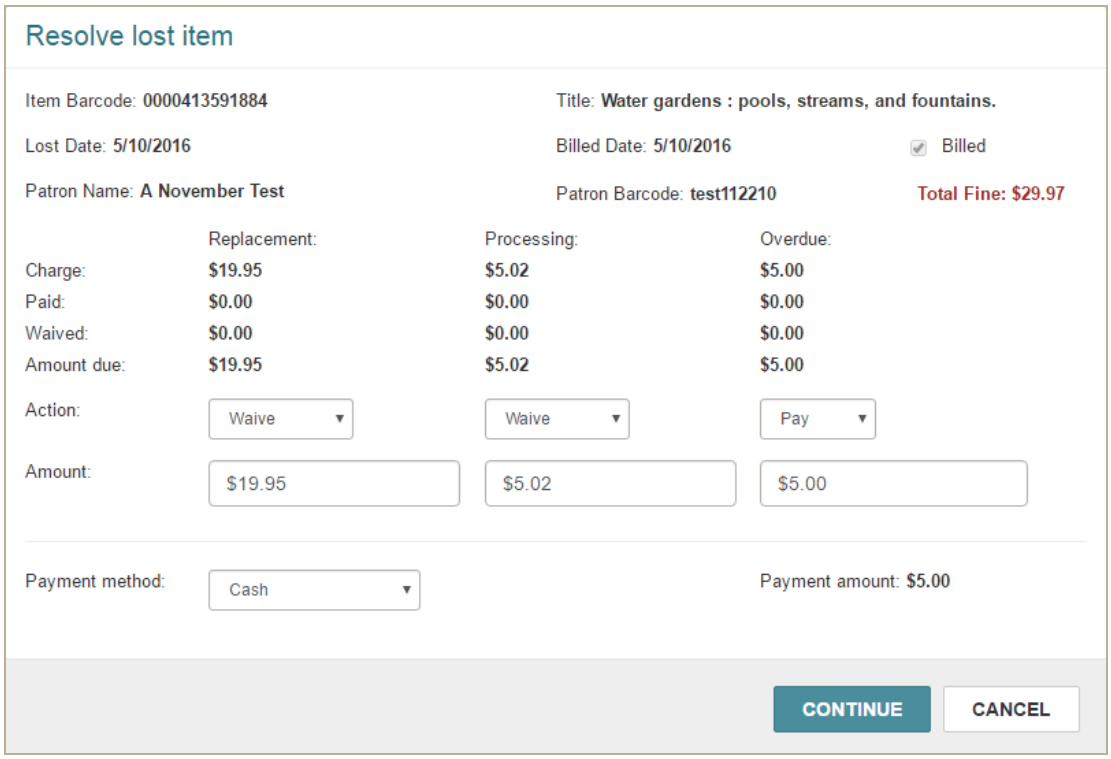
The Circulation permission, **Picklist application: Modify circulation status** can now be granted at the Library and Branch levels in Polaris Administration. Previously, this permission was available at the System level only.

Leap - Declare Lost Item and Resolve Lost Item Updates

The Declare lost item and Resolve lost item dialog boxes were updated to improve the user experience. On both dialog boxes, elements were repositioned, and a new **Payment amount** element was added.

The payment amount equals the amount of money the staff member expects, based on the actions selected and amounts displayed. If the amount expected is $0.00, the **Payment method** cannot be selected and the **Payment amount** field displays $0.00.




Resolve lost item
Item Barcode: 0000413591884
Title: Water gardens : pools, streams, and fountains.
Lost Date: 5/10/2016
Billed Date: 5/10/2016
Billed
Patron Name: A November Test
Patron Barcode: test112210
Total Fine: $29.97
Replacement:
Processing:
Overdue:
Charge: $19.95 $5.02 $5.00
Paid: $0.00 $0.00 $0.00
Waived: $0.00 $0.00 $0.00
Amount due: $19.95 $5.02 $5.00
Action: Waive Waive Pay
Amount: $19.95 $5.02 $5.00
Payment method: Cash
Payment amount: $5.00
CONTINUE
CANCEL