

POLARIS

INTEGRATED LIBRARY SYSTEM

What's New in Polaris® 3.4

This document summarizes what's new and different in Polaris 3.4.

For detailed information, see Polaris 3.4 online Help.

Important:

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

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





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Polaris Library Systems
Box 4903
Syracuse, New York 13221-4903
www.polarislibrary.com

Send any comments or questions about this document to your Site Manager or to the Technical Communications Group:
TechComm@polarislibrary.com.

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Printed in the
United States of America
August 06, 2008

This document is written for Polaris 3.4.182
Master Number Rev 2

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Polaris 3.4 Requirements

Note:

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

Polaris 3.4 requires either Microsoft Windows Server 2003 with Service Pack 2 or Microsoft Windows Server 2008. Microsoft Windows Server 2003 requires Microsoft Message Queue, available on the operating system disc but installed separately. The following additional required support software is installed automatically from the Polaris Windows Component Update disc:

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

Polaris 3.4 works with 32-bit and 64-bit server processors.

- ❑ **Web Server** - Microsoft Internet Information Server (IIS) 6.0 and Microsoft Internet Explorer 6.0 with Service Pack 1 must be installed on the Web server with Windows Server 2003 or Windows Server 2008. Microsoft Message Queue is also required.
- ❑ **Database Server** - Requires Microsoft SQL Server 2005 or Microsoft SQL Server 2008. The database server also processes statistical transactions, so it requires Microsoft Message Queue. Microsoft SQL Server Native Client is automatically installed, if necessary, when you install the staff client.

Staff Client and ActivePAC Requirements

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

- Windows XP Professional with Service Pack 2
- Windows Vista

Note:

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

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

- Visual C++ Runtime
- MS XML 4.0 Service Pack 2
- MDAC 2.8 Service Pack 1
- Microsoft Internet Explorer 6.0 with Service Pack 1
- MS Jet 4.0 Service Pack 8
- Adobe Reader 8.0
- SQL Native Client

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

Administration

This section summarizes the Polaris Administration settings that support Polaris 3.4 features, and describes general new features in Polaris Administration.

New Parameters, Profiles, and Tables

The table lists the new and modified parameters, profiles, and tables that support Polaris 3.4. For more information about new features, see the other sections of this document as listed in the table and Polaris 3.4 online Help (administration topics).

| <i>Profiles/Parameters/Tables</i> | <i>Purpose</i> | <i>Default</i> | <i>Level</i> | <i>More Info</i> |
|--|---|--|--------------------------------------|---|
| Staff Client Profiles | | | | |
| Permissions: Use Polaris-defined new permission defaults | Accept or override any Polaris default settings that grant new permissions at upgrade | Yes (accept any default settings that grant new permissions) | System | “Default Settings for New Permissions” on page 5 |
| Label profiles | Label Manager is redesigned | N/A | System, Library, Branch, Workstation | “Label Manager” on page 19 |
| Cataloging Profiles | | | | |
| MARC Validation: Authority | The MARC Validation Editor was moved from a database table to a profile. | N/A | System | N/A |
| MARC Validation: Bibliographic | The MARC Validation Editor was moved from a database table to a profile. | N/A | System | N/A |
| Patron Services Parameters | | | | |
| Check-out: warn if item is from another branch | Specifies whether a message appears at check-out that states an item belongs to another branch. | No | System, Library, Branch | “Check-Out Messages for Items from Another Branch” on page 26 |
| Check-out: warn to send item in-transit | If you set Check-out: warn if item is from another branch to Yes , this parameter controls a message that asks whether you want to put the item in-transit. | Yes | System, Library, Branch | “Check-Out Messages for Items from Another Branch” on page 26 |
| Notification Parameters | | | | |
| Notification options | New settings for exporting telephone notices | No | System | “Exporting Telephone Notices” on page 27 |

| <i>Profiles/Parameters/Tables</i> | <i>Purpose</i> | <i>Default</i> | <i>Level</i> | <i>More Info</i> |
|---|---|----------------|---|---|
| Request Parameters | | | | |
| Hold options - Misc tab: Maintain queue position for re-activated requests | Maintains queue position when a cancelled, expired, or not-supplied request is re-activated | Not selected | System, Library, Branch | “Maintaining Queue Position for Re-Activated Requests” on page 22 |
| Credit Card Payment Parameters | | | | |
| Online payments: Configure | New PayflowPro settings for AVS levels | Full | System, Library, Branch | “Credit Card Processing - AVS Levels” on page 26 |
| PAC Profiles | | | | |
| Enrich Data (new ChiliFresh tab) | Set up ChiliFresh patron ratings and reviews | N/A | System, Library, Branch | “Integration of ChiliFresh Content” on page 35 |
| Enrich Data (NoveList) | Change in URL settings | N/A | System, Library, Branch | “Change in EBSCO’s NoveList® Settings” on page 34 |
| Self-Check Parameters | | | | |
| Polaris ExpressCheck Enable | New keypad and password settings | Not selected | System, Library, Branch, Workstation | “Displaying an On-Screen Touch Keypad” on page 30 |
| Database Tables | | | | |
| Primary Display Author | Controls the tags used in displaying author in search results | 100, 110, 111 | System | “Primary Display Author Table” on page 4 |

Primary Display Author Table

Database tables specify the tags displayed for titles and authors in Polaris search results. The Primary Display Title table, added in Polaris 3.3, controls the title display. By default, a record’s displayed title is pulled from the 245 tag. If the bibliographic record does not contain a 245 tag, the primary title is pulled from the Uniform Title (130 tag). You can view the default title tags, subfields, and their order of precedence in the Primary Display Title table. If a subfield is included in the table, it is also used in sorting search results by title.

The Primary Display Author table, new in Polaris 3.4, controls the author display. By default, a record’s displayed author is pulled from the 100 tag, then from the 110 tag, then from the 111 tag. You can view the default author tags, subfields, and their order of precedence in the Primary Display Author table. If a subfield is included in the table, it is also used in sorting search results by author.

Note:

These tables do not affect what is *indexed* for keyword or browse searches, only what is displayed.

You can view these read-only tables in Polaris Administration under **Database Tables** for any organization. If you wish to change the Primary Title Display or Primary Author Display table, contact your Polaris Site Manager. These tables are used by all organizations in the system.

Default Settings for New Permissions

Permissions have been added to support Polaris 3.4 features. As in Polaris 3.3, new permissions may or may not be granted to existing staff members by default. (They are always granted to members of the Administrator group.) For Polaris 3.4, if you prefer not to accept any Polaris default settings that grant new permissions to existing staff members, set the new Staff Client profile **Permissions: Use Polaris-defined new permission defaults** to **No**. This setting causes all new permissions to be set to **No** (not granted) at upgrade, but does not affect existing permission assignments or the Administrator group. This profile is available at the system level only. The default setting is **Yes**, which accepts the Polaris default settings (may be either **Yes** or **No**) at upgrade.

Important:

The Staff Client profile **Permissions: Use Polaris-defined new permission defaults** was added to Polaris 3.3.888 so that it could be set if necessary in preparation for upgrade to 3.4. If you plan to use this profile, you must have at least Polaris 3.3.888 and set the profile *before you upgrade to Polaris 3.4*.

The table lists the new permissions as they appear in the Polaris Administration Explorer (**Security**), with their default settings.

Note:

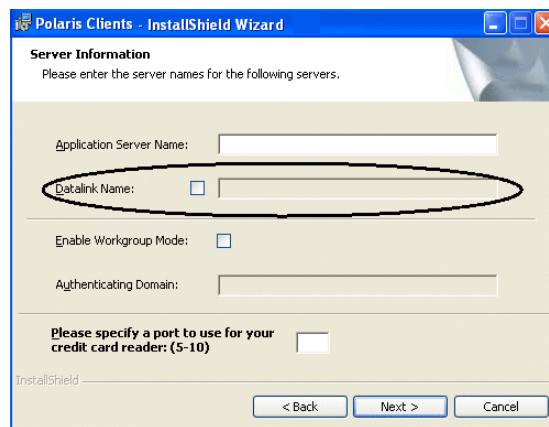
For more information about these permissions and the functionality they support, see the other sections of this document and Polaris 3.4 online Help (staff client).

| <i>Subsystem</i> | <i>New Permissions</i> | <i>Level</i> | <i>Default Assignment</i> |
|---|--|--------------|---------------------------|
| Polaris Fusion (new Security node, separately licensed - see "Polaris Fusion™" on page 37) | Access Access rules: Access control list management | System | No |
| | Access Access rules: Authentication method management | System | No |
| | Access Attribute administration: Collection management | System | No |
| | Access Content management: Create | System | No |
| | Access Content management: Import | System | No |
| | Access Content management: Link | System | No |
| | Access Polaris Fusion | System | No |
| | Access Repository set up: OAI-PMH Provider management | System | No |
| | Access Repository set up: Repository settings | System | No |
| | Access User preferences: General preferences | System | No |
| Access User preferences: Templates | System | No | |

Data Path Changes

The file paths for Polaris staff client, ActivePAC, and ExpressCheck operations that save files to the local workstation and server have changed to support Windows Vista® (client workstations) and Windows 2008 (when clients are installed on the server).

By default, the data path is set to **C:\ProgramData\Polaris\3.4**. However, if a data link (instance) is set during installation, the path is set to **C:\ProgramData\Polaris\3.4\[DataLinkName]**. The illustration shows the portion of the client installation wizard where you specify the data link name.



If no data link name is specified (or if the data link name is Polaris), the following default folders are created as appropriate:

C:\ProgramData\Polaris\3.4\Logs
C:\ProgramData\Polaris\3.4\Logs\SDI (server installation)
C:\ProgramData\Polaris\3.4\Logs\SIP
C:\ProgramData\Polaris\3.4\Logs\NCIP
C:\ProgramData\Polaris\3.4\Logs\SQLJobs (server installation)
C:\ProgramData\Polaris\3.4\Offline
C:\ProgramData\Polaris\3.4\Temp
C:\ProgramData\Polaris\3.4\Reports (server installation)
C:\ProgramData\Polaris\3.4\Wave
C:\ProgramData\Polaris\3.4\VoxFiles
C:\ProgramData\Polaris\3.4\Config
C:\ProgramData\Polaris\3.4\AuthorityUpdates (server installation)
C:\ProgramData\Polaris\3.4\EDIAgent (server installation)
C:\ProgramData\Polaris\3.4\OfflineTransaction

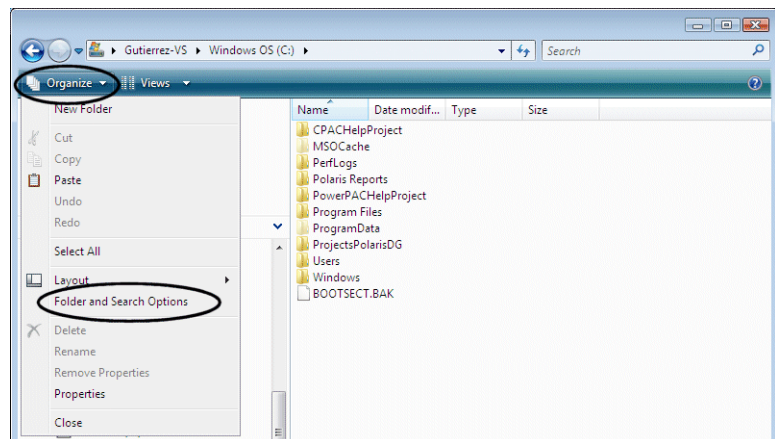
If a datalink name is specified, the folders are created as follows:

C:\ProgramData\Polaris\3.4\[DataLinkName]\Logs
 C:\ProgramData\Polaris\3.4\[DataLinkName]\Logs\SDI (server installation)
 C:\ProgramData\Polaris\3.4\[DataLinkName]\Logs\SIP
 C:\ProgramData\Polaris\3.4\[DataLinkName]\Logs\NCIP
 C:\ProgramData\Polaris\3.4\[DataLinkName]\Logs\SQLJobs (server installation)
 C:\ProgramData\Polaris\3.4\[DataLinkName]\Offline
 C:\ProgramData\Polaris\3.4\[DataLinkName]\Temp
 C:\ProgramData\Polaris\3.4\[DataLinkName]\Reports (server installation)
 C:\ProgramData\Polaris\3.4\[DataLinkName]\Wave
 C:\ProgramData\Polaris\3.4\[DataLinkName]\VoxFiles
 C:\ProgramData\Polaris\3.4\[DataLinkName]\Config
 C:\ProgramData\Polaris\3.4\[DataLinkName]\AuthorityUpdates (server installation)
 C:\ProgramData\Polaris\3.4\[DataLinkName]\EDIAGENT (server installation)
 C:\ProgramData\Polaris\3.4\OfflineTransaction (outside the *DataLinkName* folder)

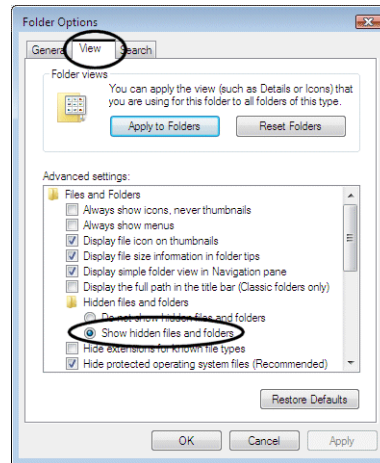
Important:

In previous versions of Polaris, Polaris ExpressCheck .xml files (EC_interface.xml and EC_messages.xml) were stored in C:\Program Files\Polaris\x.x\bin when Polaris ExpressCheck software was installed on the workstation. The Polaris Phone Attendant .xml file (PhoneMessages.xml) was also stored in C:\Program Files\Polaris\x.x\bin. If you have customized any of these files, be aware that the default versions are now located in C:\ProgramData\Polaris\3.4\Config or C:\ProgramData\Polaris\3.4\[DataLinkName]\Config. Unless you replace them with your customized versions, the system will use the default files.

On Vista workstations and Windows 2008 servers, the **ProgramData** folder may be hidden at creation. To expose it, select **Organize** on Windows Explorer for the C:\ folder, and select **Folder and Search Options** on the **Organize** menu.



On the View tabbed page of the Folder Options dialog box, select **Show hidden files and folders**, and click **OK**.

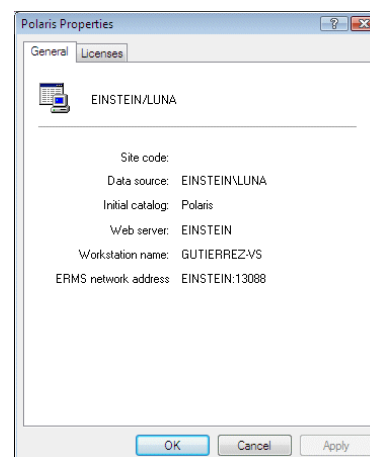


Polaris Licenses

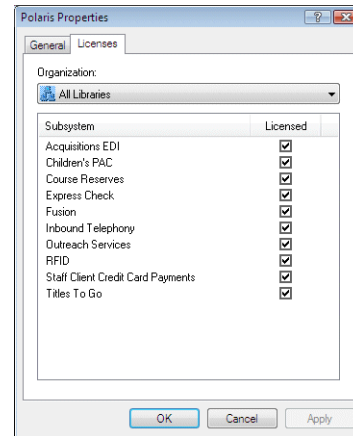
You can quickly determine the active Polaris licenses for your system. Select **Help, About Polaris** on the Polaris Shortcut Bar. The About Polaris dialog box opens. The Application Server name is now a link.



Click the link to open the Polaris Properties dialog box.



The Licenses tabbed page shows the separately licensed functions that are active at the system level. You can select an organization to see the active licenses for a particular organization (library or branch).



Maximum Number of Organizations

The maximum number of organizations that can be defined in one Polaris installation has been increased from 256 to 512.

Canadian Postal Codes Added to Database

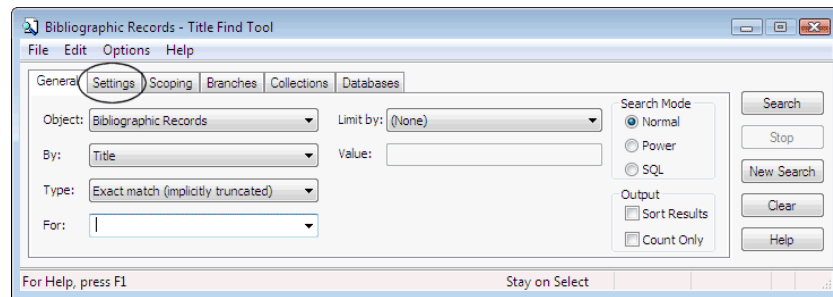
The entire set of Canadian postal codes has been added to the Postal Codes database table. When Canada is selected as a country during patron registration and the postal code is entered in the format **Z9Z 9Z9**, the table is checked for a location match.

Find Tool

The Polaris Find Tool has been improved in Polaris 3.4.

Options Tab Name Changed to Settings

The tab that was previously labeled **Options** was changed to **Settings**. This eliminates any potential for confusion with the Options menu directly above the tab.



Consistent Capitalization of Find Tool Access Points

The capitalization of the existing access points is more consistent. For example, **Supplier Name** is now **Supplier name**. In general, the first word of the search access point has an initial capital letter, but if there are more words in the search access point, they are in lowercase letters.

New Search Access Points

You can use these new access points to search using the two exact match search types (implicitly truncated or explicitly truncated). To search for a term that occurs anywhere within a note field, you must enter a leading wildcard character (*). When you select **Exact match (implicitly truncated)**, a trailing wildcard character is automatically entered. If you enter a **Limit by term**, all wildcard characters must be entered (even when the search-by type indicates implicitly truncated).

Authority Records (Cataloging)

- **Limit by Usage (Inclusive)**. The original limit-by was renamed to **Usage (Exclusive)**. If you enter a heading and limit by **Usage (Exclusive)**, the results are limited to those records that are appropriate for the selected usage.

Claims (Acquisitions)

- Search-by and limit-by **Claim note** (view 2 of workform)
- Search-by and limit-by **Claim response note** (view 1 of workform)

Fiscal Years

- Search-by and limit-by **Note** (view 1 of workform)

Funds

- Search-by and limit-by **Note** (view 2 of workform)

Purchase Orders

- Search-by and limit-by **Note** (view 3 of workform)

Invoices

- Search-by and limit-by **Note** (view 1 of workform)

Invoice Line Items

- Search-by and limit-by **Alert note** (view 2 of workform)

Purchase Order Line Items

- Search-by and limit-by **Note** (view 2 of workform)
- Search-by and limit-by **Non-public note** (view 2 of workform)
- Search-by and limit-by **Public note** (view 2 of workform)

Suppliers

- Search-by and limit-by **Plan name** (view 1 of workform)
- Search-by and limit-by **Note** (view 1 of workform)

Item Records

- Search-by **First available date** (Item property sheet)

Patron Records

- Search-by **Registration date** (Date of original registration field)

Bibliographic Records

- Search-by **First available date** (Bib property sheet)

Check-in Records

- Search-by and limit-by **Non-public note**
- Search-by and limit-by **Non-public/warning note**

Claims (Serial)

- Search-by and limit-by **Claim response note**
- Search-by and limit-by **Claim note**

Issue Records

- Search-by and limit-by **Public note**
- Search-by and limit-by **Non-public note**
- Search-by and limit-by **Non-public/warning note**

Part Records

- Search-by and limit-by **Public note**
- Search-by and limit-by **Non-public note**
- Search-by and limit-by **Non-public/warning note**


Serial Holdings Records


- Search-by and limit-by **Public note**
- Search-by and limit-by **Non-public note**
- Search-by and limit-by **Non-public/warning note**

Subscription Records

- Search-by and limit-by **Renewal instructions**
- Search-by and limit-by **Renewal note**

New Type of Material Codes

A new Type of Material code (TOM) was added to the **Limit by** options to identify bibliographic records that have links to digital media resources. You can select the TOM **dmc** in the **Limit by** box to find bibliographic records with a Leader position 06 (Type of record) of **m** (computer file) and a Leader position 07 (Bibliographic level) of **c** (collection). This combination determines the type of material code (TOM) of **Digital Collection (dmc)**. Patrons can also limit searches by this TOM in Polaris PowerPAC. The icon in PAC search results is . This change supports Polaris Fusion™, Polaris's new digital collection management product (see "[Polaris Fusion™](#)" on page 37).

A second Type Of Material code, **Abstract (abs)** was also added and can be selected in the **Limit by** box. This TOM was added to support collections of abstracts and is associated with bibliographic records where Leader position 06 is **a**, Leader position 07 is **i**, 008 position 21 is **d**, 008 position 24 is **a**, and 008 position 25 is **a**. Patrons can also limit searches by this TOM in Polaris PowerPAC. The icon in PAC search results is .

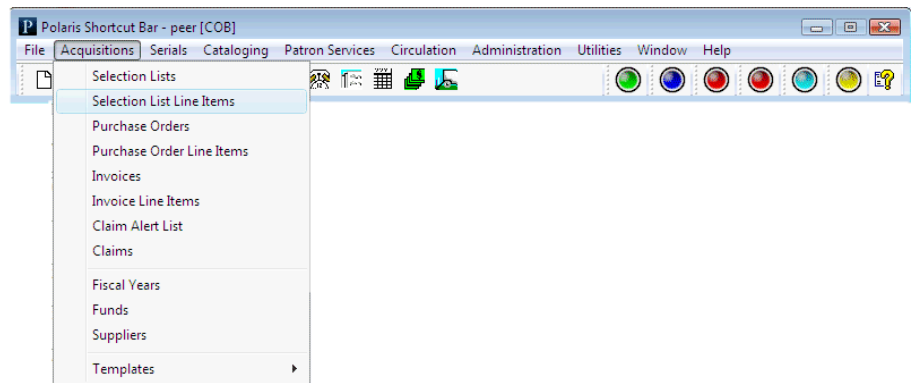
Acquisitions

The following changes were made in the Acquisitions subsystem for Polaris 3.4.

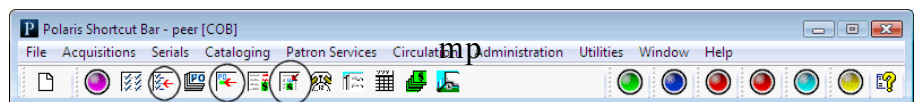
New Menu Options for Line Items in Acquisitions



You can now select **Selection List Line Items**, **Purchase Order Line Items**, or **Invoice Line Items** from the **Acquisitions** menu on the Polaris Shortcut Bar. When you select one of these menu items, the Find Tool appears with the object selected.



In addition, three new icons on the Shortcut Bar represent these menu choices.



Fields Expanded on the Purchase Order and Invoice Workforms



On the Purchase Order workform, the purchase order number and suffix fields were expanded to accommodate 30 characters for the purchase order number and 8 characters for the purchase order suffix.

New Purchase Order - 1 - General - Polaris

File Edit View Links Tools Help

Number: Status: Pending 5/12/2008

Type: Firm Order Lines: Total: Method: Purchase

General

Ordered At
Name: Community Library (Cobleskill) (COB)
 SAN: :
 Authorization:
 Plan name:
 Rental return:

Supplier
Name: Find
 SAN: :
 Account:

Payment Setup
 Fund: Comics (SLM FY 2007) Find
 Percentage paid by fund: 100

Claim Setup
 Maximum claims:
 Claim waiting period:
 1 days after release Claim notice
 2 days after 1st claim Cancel notice
 3 days after 2nd claim Auto cancel
 4 days after 3rd claim Cancel wait period
 5 days after 4th claim

For Help, press F1 NUM

The invoice number and the invoice number suffix fields were also expanded to accommodate 30 characters for the invoice number and 8 characters for the invoice suffix.

New Invoice - 1 - General - Polaris

File Edit View Links Tools Help

Number: Type: Regular Status: Open 5/12/2008

Date: 5/12/2008 Lines: Total: Method: Purchase

General

Paid By
Name: Community Library (Cobleskill) (COB)
 SAN: :
 Plan:

Supplier
Name: Find
 SAN: :
 Account:



Invoice
 Transmission method: EDI filename:
 Closing alert date: Receipt date: Shipped date:
 General note:

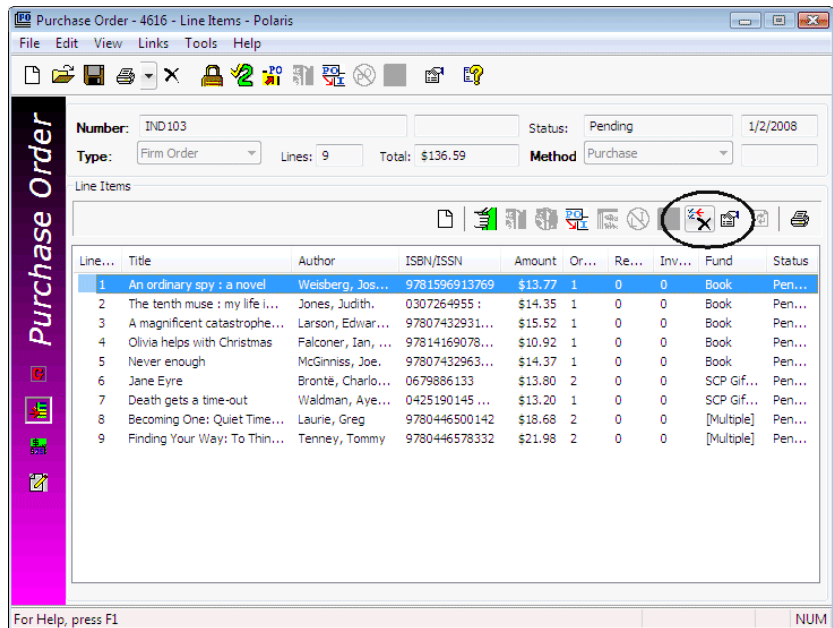
Payment Setup
 Terms: Due date: days
 Fund: Comics (SLM FY 2007) Find
 Percentage paid by fund: 100

For Help, press F1 NUM

Delete and Properties Buttons Added to the Line Items Toolbar



A delete button and a properties button now appear on the line item toolbar on the Line Items view of the Purchase Order and Invoice workforms. Select a line item and click  to delete the line item from the purchase order or the invoice. To see the line item's properties, select the line item, and click  (or press **F8**).



Negative Dollar Amounts Display in Parentheses

In the Fund Explorer, Fund, Purchase Order, and Invoice, any negative amounts now display in parentheses.

Call Number Included in Enriched EDI orders

You can now send the call number information in Enriched EDI orders. When you release a purchase order and create on-order items, the call number information from the linked on-order item records can be sent along with the segment information in Enriched EDI orders. To transmit call number information in EDI orders, you must have generated on-order items when you released the order.

EDI Agent File Paths

The location of EDI transaction files on the server has changed to
C:\ProgramData\Polaris\3.4\EDIAgent\EDINew and
C:\ProgramData\Polaris\3.4\EDIAgent\EDIDone.

If a datalink has been specified at installation, the location is
C:\ProgramData\Polaris\3.4\[DataLinkName]\EDIAgent\EDINew and
C:\ProgramData\Polaris\3.4\[DataLinkName]\EDIAgent\EDIDone.

See [“Data Path Changes”](#) on page 6.

Cataloging

The following changes were made in the Cataloging subsystem for Polaris 3.4.

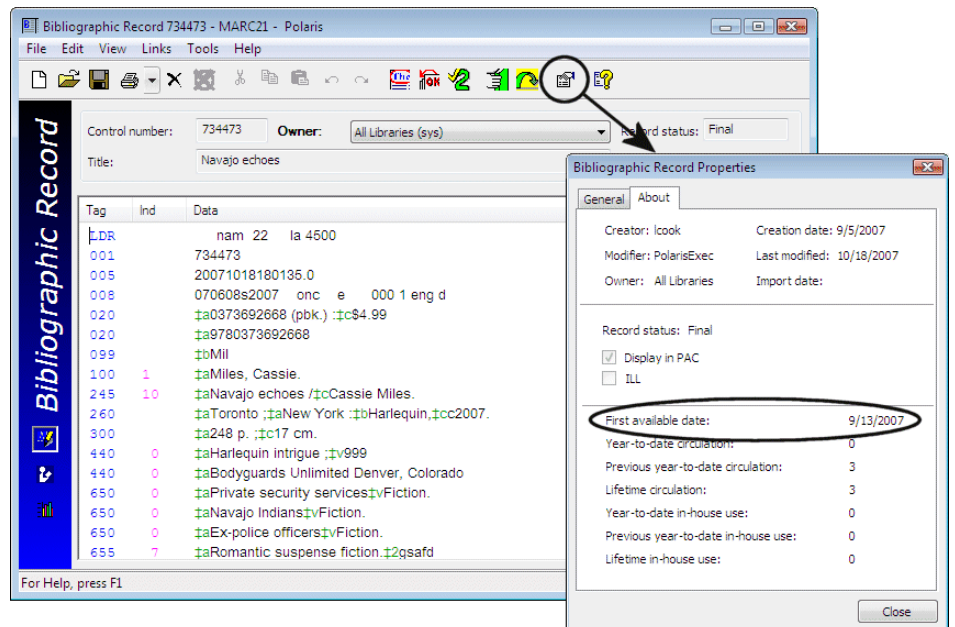
MARC Validation Profile

The MARC Validation Editor was moved from a database table to a Cataloging profile at the System level. The permissions were also changed to **Access MARC Validation Authority: Allow** and **Access MARC Validation Bibliographic: Allow**. See [“New Parameters, Profiles, and Tables”](#) on page 3.

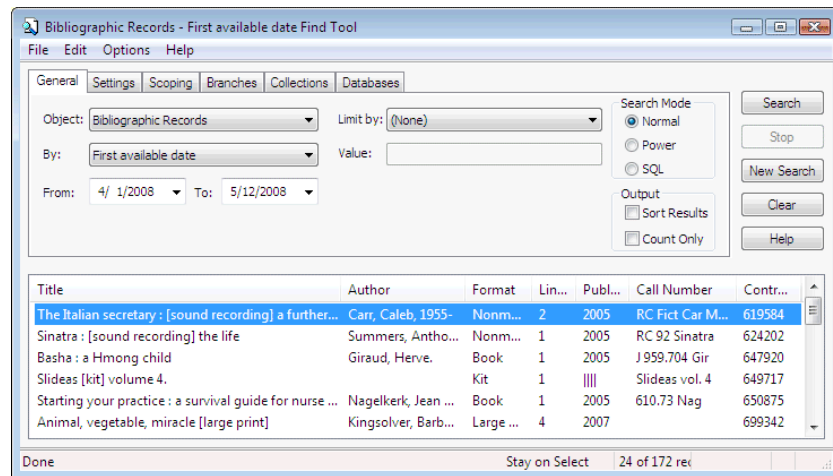
First Available Date - Bibliographic Record

A new field, **First available date**, has been added to the bibliographic record. This date reflects the date that the first item linked to the bibliographic record is available for circulation. It is used to identify new titles that are available in the library's PAC. Bibliographic records may be created in the library's database before there are any items available for circulation, but they do not appear as available until there are items available for circulation. For more information about the PAC New Titles dashboard, see [“Defining Web Parts for Dashboards”](#) in online help (Public Access Administration topics).

You can view the first available date on the Bibliographic Record Properties dialog box, **About** tabbed page.



In the Find Tool, you can search for bibliographic records by first available date.



UTF-16 Compliance

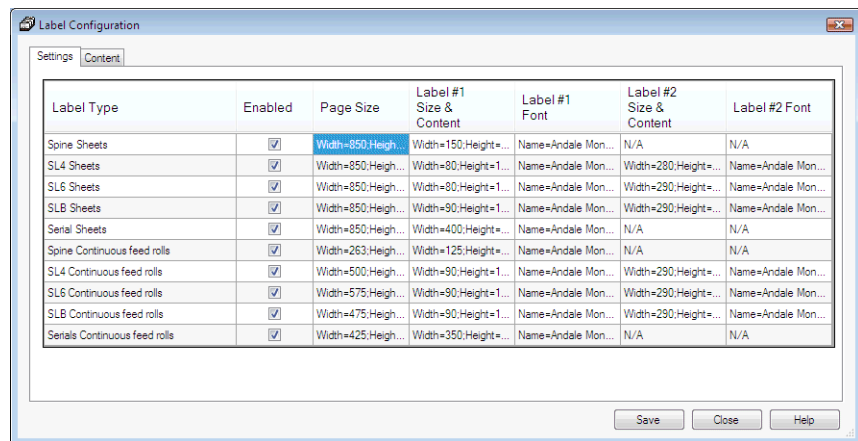
The Polaris MARC data repository is now fully Unicode-compliant (UTF-16). Polaris previously supported UTF-8 Unicode for the character sets supported by MARC 8 (Latin, Greek, Arabic, Hebrew, Chinese, Japanese, and Korean). This change supports the storage and retrieval of all character sets, expanding the library's ability to describe catalog resources and make them more accessible to patrons. UTF-16 was also incorporated because it is natively supported by SQL Server.

Label Manager

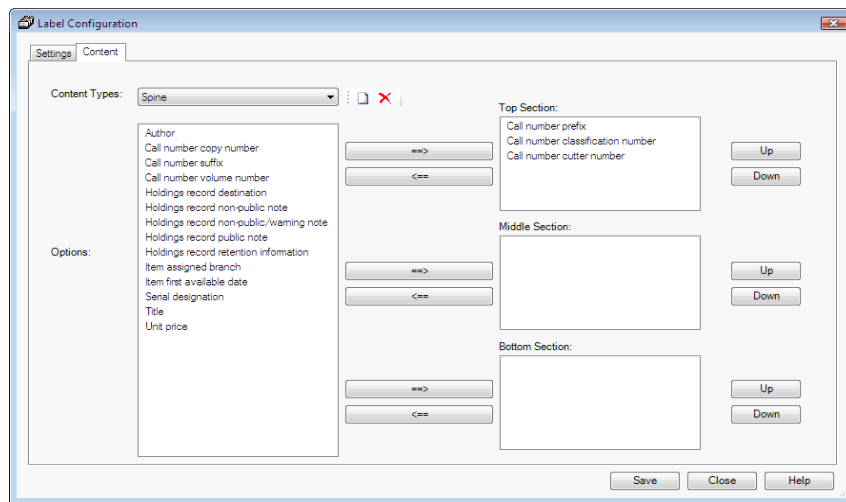


The following improvements were made to generating and printing labels for items and serial issues in Polaris:

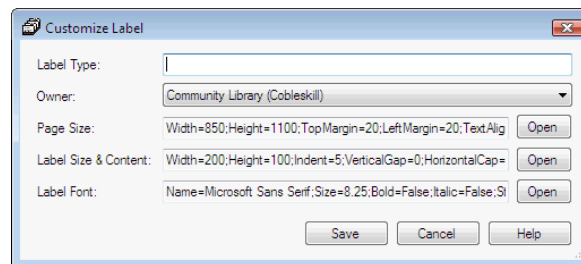
- The Label Manager is available from the Polaris Shortcut Bar under **Utilities**, or it is available from Polaris Administration.
- There is a quick print option to print labels without opening the Label Manager.
- You can set up default printers for the types of labels you print.
- After you generate your labels, you can preview them in the Label Manager, and you can use the right-click context menu to edit the page of labels.
- You can copy, paste, delete, insert text, change the font, or select diacritics to insert into the labels.
- The Label Configuration dialog box is available from the Label Manager under **Tools, Label Settings and Content**. It is also available from the staff client profile **Labels, Options** in Polaris Administration.
- Use the Settings tab on the Label Configuration dialog box to enable the label type and specify its size, type and font.



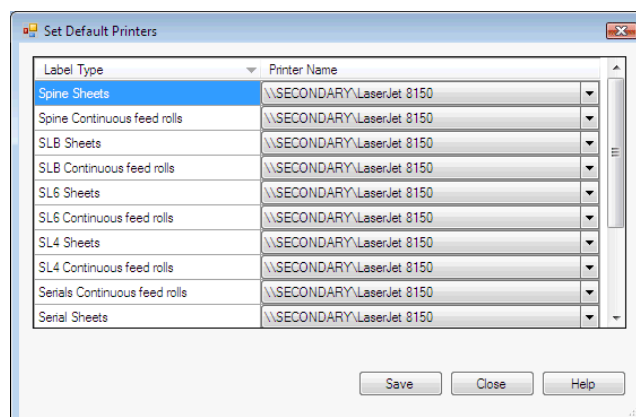
- Use the Content tab on the Label Configuration dialog box to specify the content to appear on the labels. Three new data elements are available for inclusion: **Item first available date**, **Item assigned branch**, and **Unit price**.



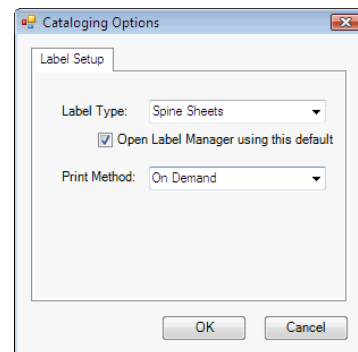
- You can also select **Tools, Design Custom Labels** from the Label Manager to create custom labels.



- For each enabled label type, you can set a default printer.



- You can change the print method and the default label type at the staff level without going into Polaris Administration. Select **Cataloging, Options** or **Serials Options** from the Polaris Shortcut Bar to open the dialog box.



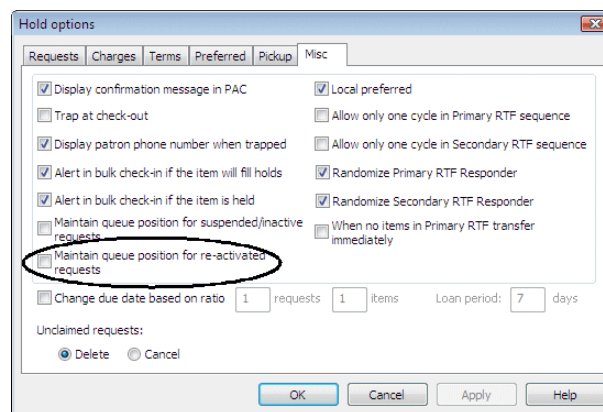
- You can save a label file in a .dat file format, and reopen the file at another time.

Patron Services/Circulation

Polaris 3.4 includes the following improvements in patron services and circulation.

Maintaining Queue Position for Re-Activated Requests

Using a new Polaris Administration setting in **Hold options - Misc tab** (Request parameters), you can choose to maintain the queue position of a not-supplied, expired, or cancelled request when the request is re-activated. Select (check) **Maintain queue position for re-activated requests**.



The system uses the setting for the request's pick-up branch.

As in previous versions of Polaris, the setting **Maintain queue position for suspended/inactive requests** controls the queue position when a suspended request is reactivated and when a request placed with an activation date in the future becomes active.

Edition Information in ILL Requests

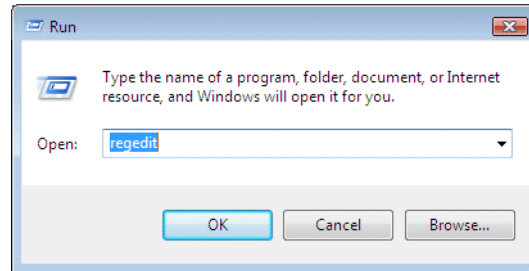
Edition information is now included in ILL requests.

Patron Photo Identification Changes

Polaris 3.3 introduced the ability to include patron photos in patron records. In Polaris 3.4, this feature is automatically active so you no longer need to contact your Polaris Site Manager to obtain it. As in Polaris 3.3, you can enable or disable the feature through Polaris Administration settings.

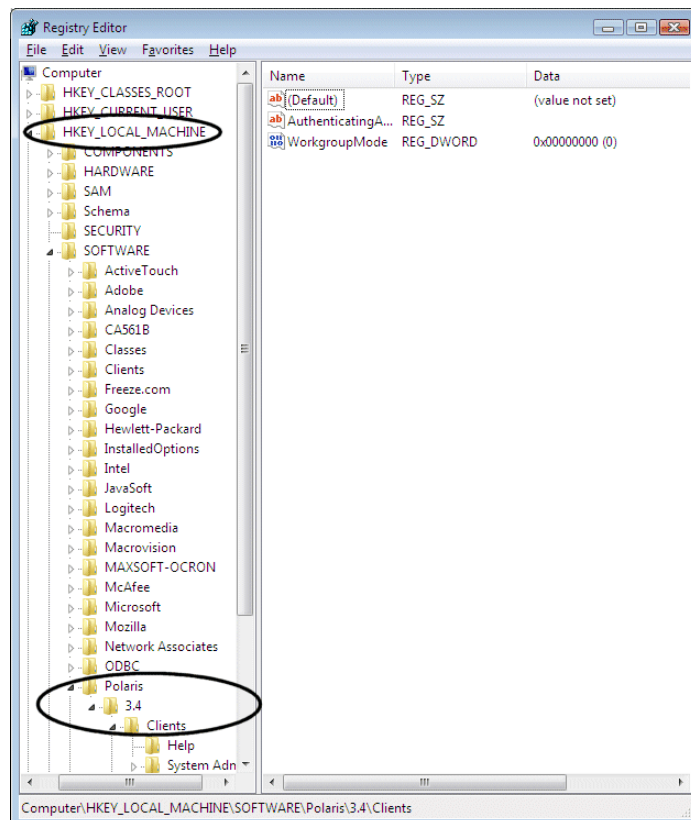
Follow these steps to use your own image as the default photo instead of the Polaris logo by editing the register on the client workstation.

1. From the Start menu, select **Run** and type **regedit**.

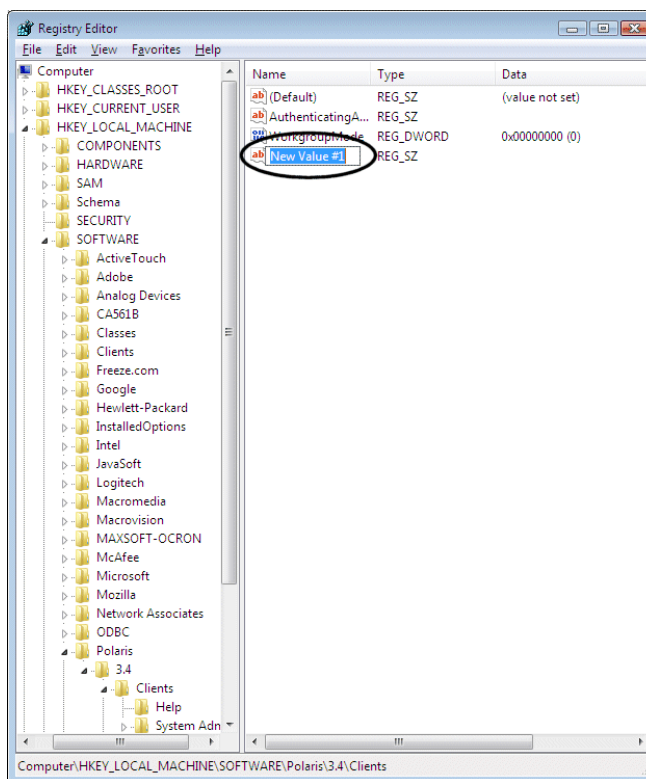


The Registry Editor opens.

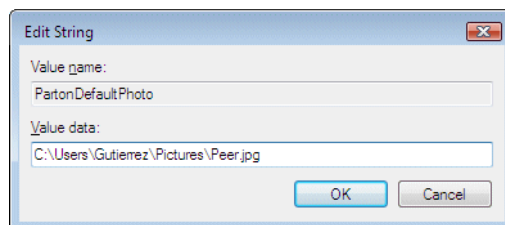
2. In the Registry Editor, select **HKEY_LOCAL_MACHINE, Software, Polaris, 3.4, Clients**.



3. Right-click in the Clients pane (right side of the Explorer) and select **New, String Value** from the context menu.
4. Type **PatronDefaultPhoto** in the string value name box and press **ENTER**.



5. Double-click the new string value, and type the complete path for your photo in the Edit String box. Then click **OK**.




When you open a patron registration workform without a photo, or the Check Out workform, your photo appears as the default photo.

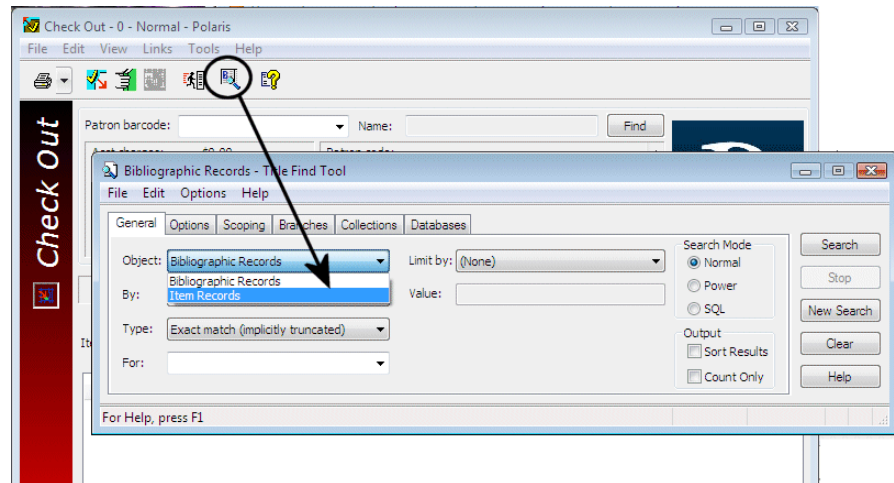
For more information about patron photo IDs, see “Setting Up Patron Photo IDs” (Patron Services Administration topics) and “Working with Patron Photos” (Patron Services topics) in staff client online Help.

Searching for Patron Records

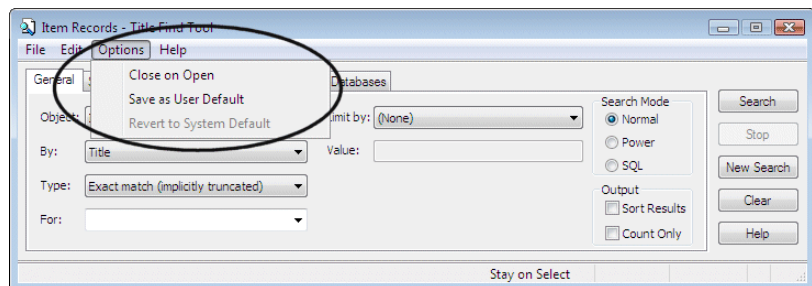
You can now search for patron records by registration date.

Searching for Item Records from the Check Out Workform

You can now search for any item record without leaving the Check Out workform and without entering patron information. Click  in the toolbar, select **Tools, Find Bibliographic Record**, or press **CTRL+B**, and select **Item Records** from the **Object** list in the Find Tool.



You can set the Find Tool so the results list is retained even after you select an item in the results list and open it. Select the Find Tool **Options** menu and be sure **Close on Open** is unchecked.



Check-Out Messages for Items from Another Branch

In previous versions of Polaris, when you attempted to check out an item belonging to another branch, the following message was displayed:

**This item is assigned to 'Branch X'
Do you want to continue with this transaction?**

In Polaris 3.4, you can control whether this message appears with a new Patron Services parameter, **Check-out: warn if item is from another branch**. The default setting is **No** (do not display the message). The message is not displayed, and the check-out transaction continues. If you want to continue to display the message, set the new parameter to **Yes**.

If you choose to display the message (**Check-out: warn if item is from another branch** set to **Yes**) and the staff member selects **No** on the message dialog box (do not continue the check-out transaction), a second message typically appears:

Do you want to put this item in transit to 'Branch X'?

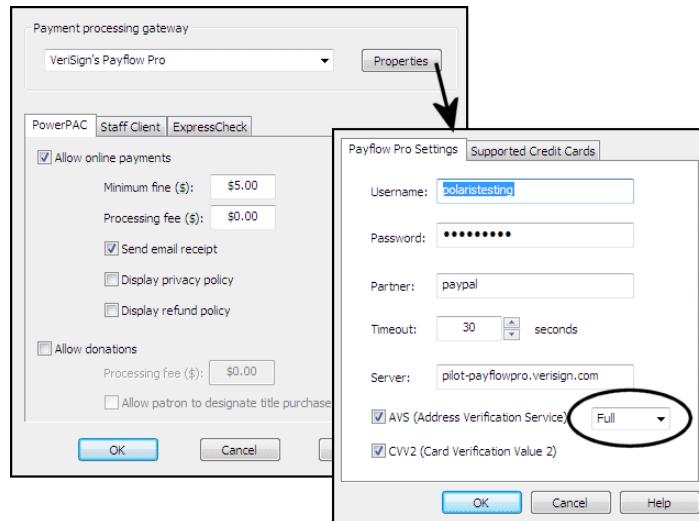
If the staff member selects **Yes**, the item status changes to In Transit. If the staff member selects **No**, the item status is unchanged. A second new Patron Services parameter, **Check-out: warn to send item in-transit**, controls whether this message is displayed. The default setting is **Yes**. If you choose not to display the second message, the item is automatically put in transit.

Credit Card Processing - AVS Levels

You can now set a level of AVS (Address Verification) checking for Verisign credit card transactions. AVS compares the submitted street address and ZIP code with the values on file at the cardholder's bank. The AVS result is for advice only, and although banks do not decline transactions based on the AVS result, you may. If you select AVS, you can set a level of verification. For the following options, Y indicates the value matches, N indicates the value does not match, and X indicates that the cardholder's bank does not support the check:

- **Full** indicates that the street address must be Y and the Zip code must be Y (YY) or the transaction is declined. There can be no N values and no X values. Earlier versions of Polaris automatically used this level.
- **Medium** indicates that there can be no N values (YY, XY, YX, XX allowed).
- **Light** declines transactions only when both values are N. All other combinations are accepted.

To set the AVS level, double-click **Online Payments: Configure** in Polaris Administration (**Credit Card Payment** parameter). Click the **Properties** button on the configuration dialog box. The AVS options are available when AVS is selected (checked) on the Payflow Pro Settings tabbed page.



Exporting Telephone Notices

Polaris 3.4 supports third-party telephone notification from Talkingtech's i-tiva. You can export overdue, fine, request pick-up, and request cancellation notices to i-tiva. Talkingtech generates the telephone notices and sends an update back to Polaris via SIP, which updates the patrons' notification history. If a telephone notice fails, Polaris sends the notice in print.

Note:

If the patron record is set to receive notices by e-mail or print, or if the notice type is set for e-mail or print only, these notices are sent as designated.

To set up exported telephone notices in Polaris Administration, select **Parameters** at the system level, and click the **Notification** tab in the details view. Double-click **Notification options**. On the Notification Options dialog box - General tabbed page, select the **Export** check box for each type of notice you will export for telephone notification. (Bills cannot be exported for telephone notification.) In the **Methods** section, select **Phone** and **Export**.

Supply information in the following **Export** fields:

- **FTP Server URI** - Type the full Internet address of Talkingtech's FTP server. Your exported notice file will be sent to this address.
- **Logon Name** - Type the logon name for Talkingtech's FTP server.
- **Password** - Type the password for Talkingtech's FTP server.
- **Save a local copy to** - Applies to exported print notices only. Any text in this field is ignored.

Polaris 3.3 supported exporting notices to UMS for print delivery. In Polaris 3.4, you can export for UMS print delivery or for i-tiva telephone notification, but not both.

Phone Number Added to E-Mail Notices

The organization's telephone number has been added to the From address in all e-mail notices.

Offline File Location Changes

When you copy **PolPatron.mdb** and **PolSystem.mdb** from the server to the local workstation in preparation for working offline, place them in the new folder **C:\ProgramData\Polaris\3.4\Offline** (or if there is a datalink, **C:\ProgramData\Polaris\3.4\[DatalinkName]\Offline**). After offline operations, the resulting transaction files are now located in **C:\ProgramData\Polaris\3.4\OfflineTransaction**, ready for uploading. See "[Data Path Changes](#)" on page 6.

Polaris Phone Attendant (Inbound Telephony) File Location

In previous versions of Polaris, the Polaris Phone Attendant .xml file (PhoneMessages.xml) was stored in C:\Program Files\Polaris\x.x\bin. If you have customized this file, be aware that the default version is now located in C:\ProgramData\Polaris\3.4\Config or C:\ProgramData\Polaris\3.4\[DataLinkName]\Config. Unless you replace it with your customized version, the system will use the default file. See [“Data Path Changes”](#) on page 6.

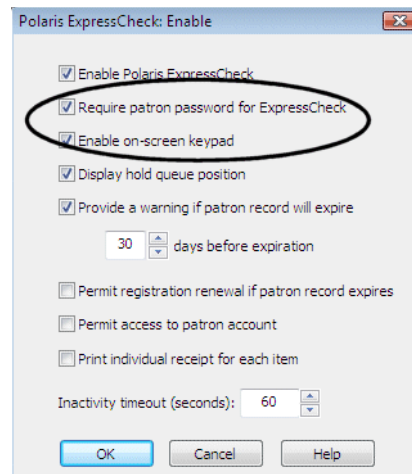
Polaris ExpressCheck

Polaris 3.4 includes the following change to Polaris ExpressCheck.

Displaying an On-Screen Touch Keypad

You can now display an on-screen touch “keypad” that a patron can use to enter her barcode number and optional password, instead of scanning the library card. When this option is selected, the Polaris ExpressCheck welcome screen displays the default message **Forgot your library card? Press here!** When the link is pressed, the on-screen keypad is displayed with the barcode field. If you have chosen to require a password, the password field is also displayed. The patron enters the information by touching the appropriate places on the keypad image, and then presses **OK**.

To enable this option, double-click **Polaris ExpressCheck: Enable** (Polaris Administration, SelfCheck Unit parameters). On the Polaris ExpressCheck: Enable dialog box, select (check) **Enable on-screen keypad**. If you want to require a password, select **Require patron password for ExpressCheck**.



These settings are available at the system, library, branch, and workstation levels.

You can customize the message on the welcome screen and the text on the account entry form by copying the following messages from the `EC_messages.xml` file to the `EC_messages_user.xml` file and editing your copies:

- `EC_TEXT_WELCOME_FORGOTCARD`
- `EC_TEXT_ONSCREENKB_TITLE`
- `EC_TEXT_ONSCREENKB_INSTRUCTION`
- `EC_TEXT_ONSCREENKB_ACCOUNTNUMBER`
- `EC_TEXT_ONSCREENKB_PASSWORD`

You can also change the location of the welcome screen link by adding an override for `welcomeform\manualaccountlink` in the `EC_interface_user.xml` file. For more information on customizing Polaris ExpressCheck messages and the user interface, see your *Polaris ExpressCheck Administration Guide*.

Polaris ExpressCheck XML File Location

In previous versions of Polaris, Polaris ExpressCheck .xml files (`EC_interface.xml` and `EC_messages.xml`) were stored in `C:\Program Files\Polaris\x.x\bin` when Polaris ExpressCheck software was installed on the workstation. If you have customized either of these files, be aware that the default versions are now located in `C:\ProgramData\Polaris\3.4\Config` or `C:\ProgramData\Polaris\3.4\[DataLinkName]\Config`. Unless you replace them with your customized versions, the system will use the default files. See [“Data Path Changes”](#) on page 6.

Polaris PAC Applications

Polaris 3.4 includes the following improvements in Polaris PAC applications.

Linking to Titles from the Patron Account Requests List

Polaris PowerPAC

When you click a title in the patron account Requests list, a search is launched for the title in the library catalog. (This feature does not apply to interlibrary loan requests.)



Saving a Title to an Existing Title List

Polaris PowerPAC

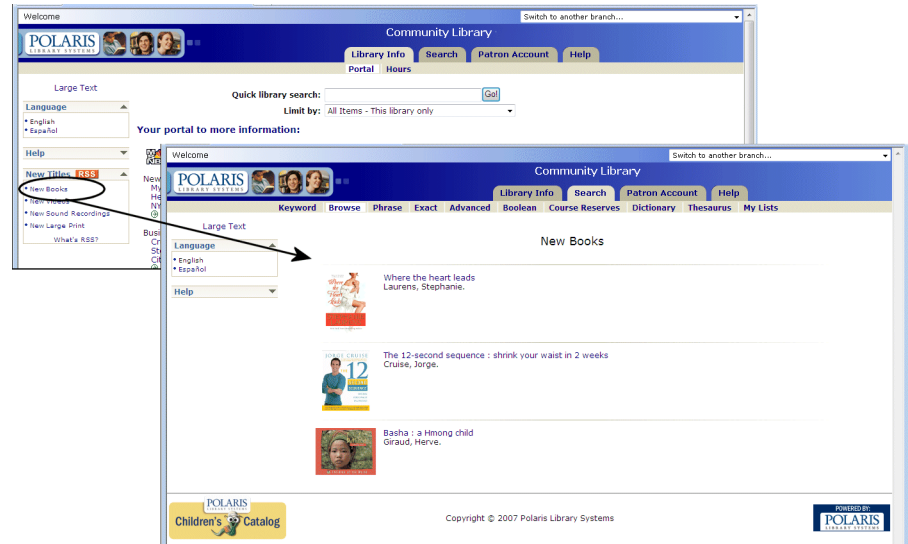
A logged-in patron can now choose to add a title from the search results list directly to a list already saved in the patron account, or to a new saved list. When the patron selects **Add to list**, the destination list choices are displayed.



Book Jackets in New Titles Lists



Polaris PowerPAC
Polaris ActivePAC

If you subscribe to book jacket images from a content provider such as Syndetics or Baker and Taylor, these are now displayed in the New Titles lists. The number is limited to 50 images to maximize performance for both content providers and patrons.

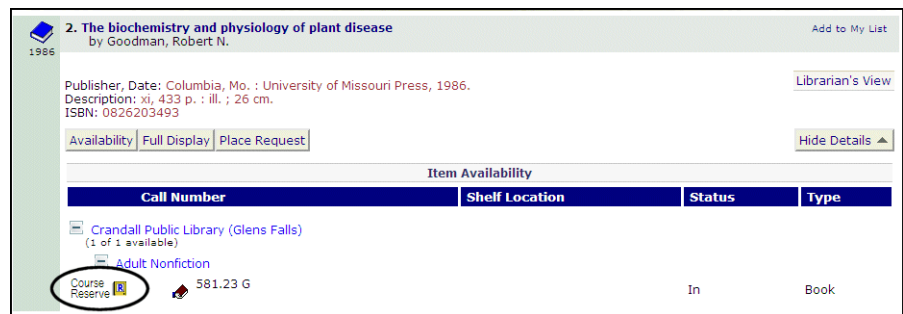


Course Reserve Items

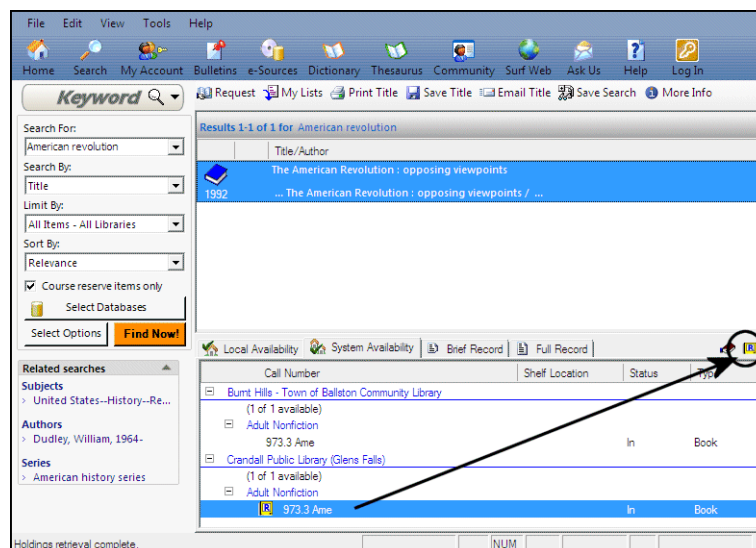
Polaris PowerPAC
Polaris ActivePAC

The icon that indicates an item is on reserve for a course has changed from  to . The new icon matches the one displayed in the Polaris staff client for the same purpose.

In Polaris PowerPAC, you click the icon to see associated course information.



In Polaris ActivePAC, you select the item and click the icon just above the availability list to see the course information.



Change in EBSCO's NoveList® Settings

Polaris PowerPAC
Polaris ActivePAC

The search URL for EBSCO's NoveList has changed: the structure of the prefix and suffix have changed, and the search is now based on the ISBN. Because the NoveList method has changed, the PAC Enrich data profile has changed to accommodate the new method.

The new default value for the prefix is
<http://search.ebscohost.com/login.aspx?direct=true&bquery=ib+>

The prefix is no longer site-specific. If you have not changed the prefix already, it is automatically changed when you upgrade to Polaris 3.4.

The new value for the suffix is
`&type=0&site=[user name]`

This value will be assigned as the default value for the suffix at upgrade. New customers should obtain their site-specific user name from NoveList. If your setting already contains the **site** tag (**`&site=`**), no changes will be made to that value. If you are still using the old **`&user=[user name]&password=[password]`** format, the value is converted to **`&type=0&site=[user name]`**. The user name defined in the old format is extracted and assigned to the new **site** tag, and you do not need to make any changes.

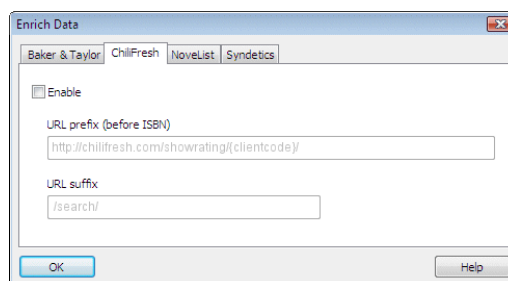
Integration of ChiliFresh Content

Polaris PowerPAC
Polaris ActivePAC

Polaris 3.3 introduced the ability to include patron ratings and reviews from ChiliFresh.com in Polaris PowerPAC. Rating symbols (stars or other images) are displayed in the cover image thumbnail area, and the patron simply clicks a link to read and write reviews.



To start ChiliFresh services, you no longer have to manually paste code provided by ChiliFresh in a page on your Polaris PowerPAC server. In Polaris 3.4, the PAC profile **Enrich Data** now includes a tab for site-specific ChiliFresh settings. ChiliFresh content is also available in ActivePAC.



Select (check) **Enable**, and type your site code *over* **clientcode** in the **URL Prefix** box. Your Polaris Site Manager helps you obtain your specific site code.

Note:

The ChiliFresh prefix and suffix surround the ISBN in the URL for a ChiliFresh search. The suffix is the same for every site. Do not change the default entry in the **URL Suffix** box.

When you supply your site code in the Enrich Data profile, it is not overwritten at upgrade.

For more information about ChiliFresh, go to www.ChiliFresh.com. To sign up for a free trial, go to the Polaris Customer Extranet and select **Products & Services, Partners, ChiliFresh Signup**.

Notes:

If you have set the PAC Active client profile **Web links: Use secure view** to **Yes**, patrons cannot write reviews in ActivePAC.

If you need to disable support for ChiliFresh in the ActivePAC only, you can run ActivePAC with the **-nochili** runtime switch. Contact your Polaris Site Manager for help with this feature.

Version and Build Number in Page Footer

Polaris PowerPAC

The Polaris PowerPAC page footer now includes the Polaris version and build number.



Canadian Postal Codes in PAC Patron Registration

Polaris PowerPAC

Canadian postal codes are now included in the Polaris database. When a patron selects Canada while registering online and does not include a space in the postal code, the system inserts the space after the first three characters and the database is searched for a location match.

Polaris Fusion™

Polaris Fusion is a digital collection management system that works with the Polaris ILS. With Polaris Fusion, libraries can expose, maintain, and manage digital collections. You can use Polaris Fusion to attach multiple digital files (for example, images, Microsoft Word documents, MP3s and PDFs) to MARC records within the Polaris database, and expose this digital content to patrons through Polaris PowerPAC. If you choose, you can expose your library's digital collection to Web crawlers, such as Google, through an OAI-PMH compliant Web service, a MARC XML Web service, or Z39.50.

You can use Polaris Fusion to:

- ❑ **Integrate digital media with your catalog.** You can manage your library's digital content through MARC records in Polaris Cataloging. Each file or digital asset is linked to a MARC record.
- ❑ **Provide access to digital content through Polaris PowerPAC.** Patrons search for digital content in Polaris PowerPAC the same way they search for physical materials, since the digital assets are linked to MARC records. When the digital asset is located, the content is delivered to the patron via a set of one or more enriched data links.
- ❑ **Import records.** You can import MARC and non-MARC records with a user-defined import process that transforms the non-MARC records into MARC records.
- ❑ **Create MARC record templates for digital media.** Set up templates to make it easy for non-catalogers to create bibliographic records in Polaris Fusion.
- ❑ **Create MARC records using a labeled editor.** Any staff member with the required permissions can create MARC records in Polaris Fusion's labeled editor.
- ❑ **Control access to digital media.** Some collections contain content that is "free to all," but other collections may require limited access. You can selectively control access to your digital media collections.
- ❑ **Expose digital content to Web crawlers.** If you choose, you can expose your library's media-enabled content to Web crawlers, such as Google, via a fully compliant OAI-PMH data provider.

Polaris Fusion is a separately licensed product. For more information about Polaris Fusion, including purchasing licenses, contact your Polaris Customer Sales Representative.

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