POLARIS
INTEGRATED LIBRARY SYSTEM

# What's New in Polaris® 3.5

This document summarizes what's new and different in Polaris 3.5 through build 297.
For detailed information, see Polaris 3.5 documentation and online Help.

**Important:**
For information about developments that may have occurred after this information was published, go to **www.polarislibrary.com** and select **Customer 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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**Master Number** Rev 2

# Contents

# Polaris 3.5 Requirements

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

Polaris 3.5 works with 32-bit and 64-bit versions of the server operating system. Polaris 3.5 requires either Microsoft Windows Server 2003 with Service Pack 2 or Microsoft Windows Server 2008. Microsoft Message Queue is required on the application server only. The following additional required support software is installed automatically from the Polaris Windows Component Update disc:

- SQL 2005 Native Client
- Visual C++ Runtime 8.0 with Service Pack 1
- Visual C++ Runtime 9.0 with Service Pack 1
- Microsoft.NET Framework 3.5 with Service Pack 1
- Windows Installer 4.5
- Microsoft XML 4.0 with Service Pack 2
- Microsoft XML 6.0
- MDAC 2.8 with Service Pack 1

Adobe® Reader is also required to view reports but is not included on the Polaris Windows Component Update disc.

Polaris clients require one of the following operating systems:

- Windows XP Professional with Service Pack 3
- Windows Vista with Service Pack 1

## Upgrades

You can upgrade from Polaris 3.3 directly to Polaris 3.5, without installing Polaris 3.4.

# Administration

This section summarizes the Polaris Administration settings that support Polaris 3.5 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 3.5. For more information about new features, see the other sections of this document as listed in the table and Polaris 3.5 online Help (administration topics).

| *Profiles/Parameters/ Tables* | *Purpose* | *Default* | *Level* | *More Info* |
|---|---|---|---|---|
| **Staff Client Profiles** | | | | |
| Default view selected when bibliographic record opened | Sets a default opening view for the workform regardless of where the workform is opened | No preference - depends on where workform is opened | System, Library, Branch, Workstation, Staff | "Preferred View for Bibliographic Record" on page 14 |
| **Patron Services Profiles** | | | | |
| Patron registration user-defined fields<br>(Replaces Patron registration user defined field 1-5 profiles) | Define free-text and drop-menu UDFs; specify options for drop-menu UDFs; convert one type of UDF to the other. Branch level: filter UDF drop-menu options, set display order | N/A | System, Library, Branch | "User-Defined Fields in Patron Records: Improvements" on page 56 |
| **Cataloging Profiles** | | | | |
| Item bulk change: Warning if changing Assigned or Home branch | Specifies if a warning appears when you bulk change the assigned or home branches for multiple item records and the values are not the same | No | System, Library, Branch | "Bulk Change Prompts" on page 33 and "Floating Collections" on page 49 |
| Item Records: Warning if changing Assigned or Home branch | Specifies if a warning appears when you change the assigned or home branch on the Item Record workform and the two values are not the same | No | System, Library, Branch | "Item Record Prompts" on page 35 and "Floating Collections" on page 49 |
| **PAC Profiles** | | | | |
| Fines & Fees: Show history in detailed view | Displays or suppresses the history section of the detailed view for a fine or fee in the patron account | Yes | System, Library, Branch | "Suppressing Fines & Fees History in PAC" on page 76 |

| *Profiles/Parameters/ Tables* | *Purpose* | *Default* | *Level* | *More Info* |
|---|---|---|---|---|
| Patron Access options - Log In tab | Contains new options for patron user names, forgotten passwords, and numeric passwords | No | User names, forgotten passwords - System level only; numeric password - System, Library, Branch | "Patron User Names, Forgotten and Numeric Passwords" on page 72 |
| Search options: Limit by collection enabled | Offer a collections scoping option on the Advanced and Search Option pages in Polaris PowerPAC and ActivePAC | No | System, Library, Branch | "Scoping Searches by Collection" on page 70 |
| **PowerPAC Profiles** | | | | |
| Highlight local items in matching title view | Highlight titles in search results with at least one local item attached | No | System, Library, Branch | "Titles with Local Items Highlighted in Search Results" on page 69 |
| Search: Display search criteria in search box for link-produced searches | Display system-generated search term in search box when a search is launched from a link | No | System, Library, Branch | "Suppressing Search Terms for Searches Launched from Links" on page 70 |
| Search: Sub-sort-by-title | Subsort search results by title | No | System, Library, Branch | "Search Results Subsorted by Title" on page 67 |
| **Children's PAC Profiles** | | | | |
| Allow hold requests if charging for holds | Allows hold requests from Children's PAC if the Request parameter is set to charge for hold requests | No | System, Library, Branch | "Charging for Hold Requests in Children's PAC" on page 76 |
| **Patron Services Parameters** | | | | |
| Check-in: Prompt for in-transit in bulk mode | Specifies if a prompt appears when an item is checked in at a branch other than the assigned branch | No | System, Library, Branch | "Bulk Check In: Prompt for In-Transit" on page 61 |
| Fine and loan period defaults | Sets default values for new fine and loan period codes | Fine amt - $0<br>Max fine - $0<br>Grace per - 0<br>Loan unit - 1<br>Time unit - Days | System, Library, Branch | "Loan Period Codes and Fine Codes" on page 54 |
| Floating: Float items with no matching collection | If set to Yes, items can float even if the receiving branch has no matching collection. When such an item is checked in at the receiving branch, the item's Assigned Collection is reset to blank (none assigned) for the new Assigned Branch. | No | System, Library, Branch | "Floating Collections" on page 49 |

| *Profiles/Parameters/ Tables* | *Purpose* | *Default* | *Level* | *More Info* |
|---|---|---|---|---|
| Floating: Items with blank Assigned Collection can float | If set to Yes, items with no Assigned Collection can float. The Assigned Collection remains blank for the new Assigned branch. | No | System, Library, Branch | "Floating Collections" on page 49 |
| Floating: Prompt for additional floating items | If set to Yes, and a floating item is checked in, a prompt appears if the item would exceed the maximum limit for items attached to the same bibliographic record. The staff member can override the limit and accept the item.<br>If set to No, no message is displayed and the item goes in-transit back to the home branch. | No | System, Library, Branch | "Floating Collections" on page 49 |
| Floating enabled | To use floating collections, parameter must be set to Yes for both home branches and receiving branches | No | System, Library, Branch | "Floating Collections" on page 49 |
| Patron registration: Filter patron codes | Determines which patron codes are available for selection in an organization's workforms | All selected | System, Library, Branch | "Filtering the Display of Patron Codes" on page 55 |
| Undefined Fine Amount | If a fine amount cannot be calculated, this setting is used. Also used automatically when a new organization or patron code is added to the Fines table. | $5.00 | System | "Undefined Loan Period and Undefined Fine Amount" on page 54 |
| **Cataloging Parameters** | | | | |
| Item record history display assigned branch | Specifies if the assigned branch appears in the Circulation History view of the Item Record workform | Yes | System | "Item Records - New History View" on page 30 |
| Item record history display patron link | Specifies if the patron record ID appears in the Circulation History view of the Item Record workform | No | System | "Item Records - New History View" on page 30 |
| Item record history time threshold | Specifies how long the circulation history displays in the Circulation History view of the Item Record workform | 365 day(s) | System | "Item Records - New History View" on page 30 |
| **Telephony - Outbound Parameters (set for telephony server)** | | | | |
| Cancels - Allow patron to list canceled titles | When set to Yes, provides a menu option for patrons to hear the specific titles of canceled requests | No | Server | "Telephone Notification Redesigned" on page 47 |

| *Profiles/Parameters/ Tables* | *Purpose* | *Default* | *Level* | *More Info* |
|---|---|---|---|---|
| Cancels - Include material type when listing canceled titles | If a list of specific titles is provided, it includes item material types | No | Server | "Telephone Notification Redesigned" on page 47 |
| Cancels - maximum number of canceled titles to list | If a list of specific titles is provided, limits the number of titles listed | 5 | Server | "Telephone Notification Redesigned" on page 47 |
| Holds - Allow patron to list held titles | When set to Yes, provides a menu option for patrons to hear the specific titles of holds ready for pickup | No | Server | "Telephone Notification Redesigned" on page 47 |
| Holds - Include material type when listing held titles | If a list of specific titles is provided, it includes item material types | No | Server | "Telephone Notification Redesigned" on page 47 |
| Holds - Maximum number of held titles to list | If a list of specific titles is provided, limits the number of titles listed | 5 | Server | "Telephone Notification Redesigned" on page 47 |
| Overdues - Allow patron to list overdue titles | When set to Yes, provides a menu option for patrons to hear the specific titles that are overdue | No | Server | "Telephone Notification Redesigned" on page 47 |
| Overdues - Include branch when listing overdue titles | If a list of specific titles is provided, it includes the items' assigned branches | No | Server | "Telephone Notification Redesigned" on page 47 |
| Overdues - Include material type when listing overdue titles | If a list of specific titles is provided, it includes item material types | No | Server | "Telephone Notification Redesigned" on page 47 |
| Overdues - Maximum number of overdue titles to list | If a list of specific titles is provided, limits the number of titles listed | 5 | Server | "Telephone Notification Redesigned" on page 47 |
| Phone notification - Local area code | Identifies the area code local to the telephony server. If you specify a three-digit area code with this parameter and set **Phone notification - Remove local area code before dialing** to **Yes**, the following are removed from the start of the patron's telephone number before dialing: [area code], 1[area code], and 1,[areacode]. | Null (none specified) | Server | "Telephone Notification Redesigned" on page 47 |

| *Profiles/Parameters/ Tables* | *Purpose* | *Default* | *Level* | *More Info* |
|---|---|---|---|---|
| Phone notification - Remove local area code before dialing | When set to **Yes**, if a three-digit local area code has been specified with the parameter **Phone notification - local area code,** the following are removed from the start of the patron's telephone number before dialing: [area code], 1[area code], and 1,[areacode]. When set to **No**, the entire telephone number is dialed. | No | Server | "Telephone Notification Redesigned" on page 47 |
| Phone notification - Time required for voice call to be considered complete | Specifies how many seconds a telephone notice call must last to consider the notice as delivered | 7 seconds | System | "Telephone Notification Redesigned" on page 47 |
| Phone notification - Use patron name in greeting | Specifies whether telephone notices include the patron's name in the greeting | No | Server | "Telephone Notification Redesigned" on page 47 |
| **Acquisitions/Serials Parameters** | | | | |
| Delete linked issue/part when serial item is deleted | If the parameter is set to Yes, and a user deletes an item record in Cataloging, and there are issues or parts linked to it, they are automatically deleted. If set to No, only the item record is deleted, not the serial issue/part record. | Yes | System, Library, Branch | "Delete Received Issues and Linked Items" on page 40. |
| **Policy Tables** | | | | |
| Currencies | Lists the currencies and currency codes for the library. You can enable currencies or add new currency codes. | US Dollar (USD) | System, Library, Branch | "Currency Conversion" on page 20 |
| Floating: To branch | Specifies the potential receiving branches for a home branch that allows items to float | All branches set to No (cannot receive floating items) | System, Library, Branch | "Floating Collections" on page 49 |
| Floating: Material Types | Specifies the specific material types that should not float from the home branch | All material types set to Yes (can float) | System, Library, Branch | "Floating Collections" on page 49 |
| Floating: Material type limits | Specifies how many items of a specific material type and attached to the same bibliographic record a receiving branch is willing to accept. | For all material types, items with status of In set to 5; total items of any circ status set to 10 | System, Library, Branch | "Floating Collections" on page 49 |

# New Permissions

Permissions have been added to support Polaris 3.5 features.

**Important:**
New permissions may or may not be granted to existing staff members by default. (They are always granted to members of the Administrator group.) 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. If you set this profile to **No**, all new permissions are set to **No** (not granted) at upgrade. The profile does not affect existing permission assignments or the Administrator group. 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 3.5*.

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 3.5 online Help (staff client).

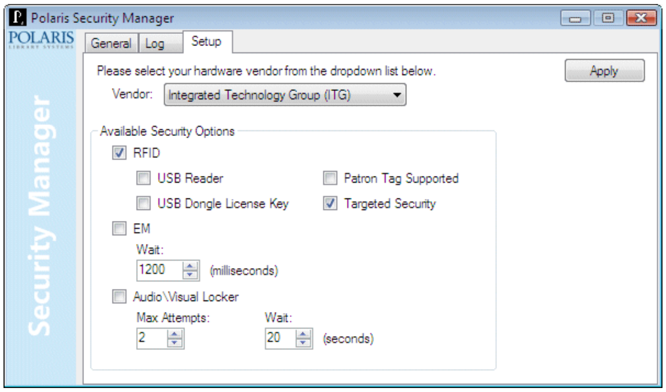
| *Subsystem* | *New Permissions* | *Level* | *Default Assignment* |
|---|---|---|---|
| System Administration | WebAdmin access: Allow | System | No |
| | Modify floating material type limits table: Allow | System | No |
| | Modify floating material types table: Allow | System | No |
| | Modify floating to branches table: Allow | System | No |
| | Modify currencies table: Allow | System | No |
| Cataloging | Item Records: Modify history view | System, Library, Branch | Yes for those who already have permission to modify the item record header; otherwise No |

| *Subsystem* | *New Permissions* | *Level* | *Default Assignment* |
|---|---|---|---|
| Circulation | Manage item dialogs: Modify assigned collection | System, Library, Branch | No |
| | Manage item dialogs: Modify blocks | System, Library, Branch | No |
| | Manage item dialogs: Modify material type | System, Library, Branch | No |
| | Manage item dialogs: Modify notes | System, Library, Branch | No |
| | Manage item dialogs: Withdraw items | System, Library, Branch | No |
| Acquisitions | Adjust currency exchange rate: Allow | System, Library, Branch | No |

# Security Manager

The Polaris Security Manager is automatically installed if you select RFID, EM (electromagnetic), or AV Locker security options while installing Polaris ExpressCheck, or RFID while installing the Polaris staff client. Settings in the Security Manager are vendor-specific, not Polaris client-specific, so any changes you make in the Security Manager affect all the client workstations using that vendor’s security features.

The Security Manager is set with the equipment manufacturer’s default values and the security options you selected for your vendor when you installed the client software. If you need to change these settings, open **SecurityManager.exe**, located by default on the client workstation at **C:\Program Files\Polaris\3.5\Bin**
The Security manager icon is placed in the desktop tray, and you can click the icon to open the Security Manager.




In addition, for Polaris ExpressCheck clients running on ITG hardware, you can change ITG settings for EM and the AV Locker:

- ❑ **EM Wait (milliseconds)** - Sets the amount of time Polaris ExpressCheck pauses while the EM device travels along the rails inside the unit.
- ❑ **AV Locker** - When this option is enabled and an item is scanned, the material type is checked in the SelfCheck Material Types policy table. If the **Unlocker** option is set to **Yes** for the material type (see “Polaris ExpressCheck and ITG” on page 82), an ExpressCheck instruction screen explains how to unlock the media locker.
  - **Max Attempts** - Specifies the number of intervals the software waits for the user. If the user exceeds the maximum number of attempts, the item is not checked out.
  - **Wait (seconds)** - Specifies long the locker remains unlocked.

**Important:**
Port 8075 must be open on the ExpressCheck workstation if any security features (RFID, EM, AV Locker) are used. This port is used for communication between the Polaris ExpressCheck and the Security Manager applications.

# Staff Client - General

## Find Tool Improvements

There are many changes to the Polaris Find Tool, including **Sort by** options to select as part of your search; searching for diacritics and special characters; and more **Limit by** options.

### *New Sort Options*

A new **Sort by** list box was added to the General tab of the Find Tool. The **Sort** option was removed from the Settings tab, and the Polaris Administration profile **Find Tool: Do not automatically sort if the result set is greater than** was also removed. You can include the **Sort by** option as a user default for searching. The table lists the new **Sort by** options by subsystem and object (record).

| *Subsystem* | *Record Type* | *Sort by Options* | |
|---|---|---|---|
| **Cataloging** | **Authority Records** | Control Number<br>Heading | Relevance |
| | **Authority Template** | Name<br>Name, then Record Owner | Record Owner |
| | **Bibliographic Record** | Author<br>Author, then Publication Date<br>Author, then Title<br>Call Number<br>Call Number, then Author<br>Call Number, then Publication Date<br>Call Number, then Title<br>Control Number<br>Most Popular<br>Publication Date | Publication Date, then Author<br>Publication Date, then Relevance<br>Publication Date, then Title<br>Relevance<br>Title<br>Title, then Author<br>Title, then Author, then Type of Material<br>Title, then Type of Material<br>Title, then Publication Date<br>Type of Material |
| | **Bibliographic Template** | Name<br>Name, then Record Owner | Record Owner |
| | **Item Record** | Assigned Branch<br>Control Number<br>Relevance | Title<br>Title, then Assigned Branch |
| | **Item Template** | Name<br>Name, then Record Owner | Record Owner |
| | **Record Set (Cataloging)** | Name<br>Name, then Record Set Type | Record Set Type |

| *Subsystem* | *Record Type* | *Sort by Options* | |
|---|---|---|---|
| **Cataloging (cont.)** | **Reserve Item Records** | Call Number<br>Title | Title, then Call Number |
| | **Reserve Item Template** | Name<br>Name, then Record Owner | Record Owner |
| | **Course Reserve Records** | Control Number<br>Course Name | Course Name, then Course Number/Section<br>Course Number/Section |
| | **Course Reserve Templates** | Name<br>Name, then Record Owner | Record Owner |
| **Patron Services** | **Patron Record** | Barcode<br>City<br>Library | Name<br>Postal Code<br>State |
| | **Record Set (Patron)** | Creation Date<br>Name | Owner |
| **Acquisitions** | **Claims** | ISSN/ISBN<br>Library Account Number<br>Owner<br>PO Number | Supplier Alternative Name<br>Supplier Name<br>Title |
| | **Fiscal Year** | Fiscal Year Name<br>Fund Alternative Name | Fund Name<br>Owner |
| | **Fund** | Fiscal Year Name<br>Free Balance<br>Fund Alternative Name<br>Fund External Name | Fund Name<br>Owner<br>Total Allocated |
| | **Invoice line item** | Author<br>Fund Alternative Name<br>Fund Name<br>Invoice Date | Invoice Number<br>Invoice Number Suffix<br>ISBN/ISSN<br>Title |
| | **Invoice** | Invoice Date<br>Invoice ID<br>Invoice Number | Invoice Number Suffix<br>Note<br>Supplier Name |
| | **Purchase order line item** | Author<br>Fund Alternative Name<br>Fund Name<br>ISBN/ISSN<br>PO Line ID | PO Number<br>PO Number Suffix<br>PO Release Date<br>Title<br>Title Ordered As |
| | **Purchase order template** | Date Created<br>Owner | PO Number Suffix<br>Supplier Name |
| | **Purchase order** | Owner<br>PO Number Suffix<br>PO Release Date | Purchase Order Number<br>Supplier Name |
| | **Selection list line item** | Author<br>Decision Date<br>ISBN/ISSN | Title<br>Title, then Author |

| *Subsystem* | *Record Type* | *Sort by Options* | |
|---|---|---|---|
| **Acquisitions (cont.)** | **Selection list** | Creation Date<br>Creator<br>Library | Selection list name<br>Status Date |
| | **Supplier** | Library Account Number<br>Owner | Supplier Alternative Name<br>Supplier Name |
| **Serials** | **Check in records** | Collection<br>Destination<br>ISBN<br>ISSN | Material Type<br>Order Type<br>Supplier Name<br>Title |
| | **Claim** | Branch<br>ISBN/ISSN<br>Issue Status Date<br>Library Account Number | Supplier Account Number<br>Supplier Name<br>Title |
| | **Issue Record** | Destination<br>Expected Arrival Date<br>ISSN | Status<br>Title |
| | **Part Record** | Destination<br>Expected Arrival Date<br>ISBN | Status<br>Title |
| | **Route List** | Member Name<br>Owner<br>Route List Name | Route Slip Name<br>Route Slip Location |
| | **Serial Holdings Record** | Collection<br>Control Number<br>Destination<br>ISBN<br>ISSN | Material Type<br>Membership Name<br>Order Type<br>Title |
| | **Subscription Record** | Control Number<br>Expiration Date<br>ISSN<br>Owner | Renewal Date<br>Supplier Name<br>Title |
| **Administration** | **Groups** | Description<br>Group Record ID | Name<br>Name, then Description |
| | **Libraries** | Library Name<br>Library Name, then System | Name/Abbr<br>System Name/Abbr. |
| | **Servers** | Server Name<br>Server Name, then Server Type | Server Type |
| | **Staff Members** | Organization<br>Staff Member Name | Staff Member Name, then Organization |
| | **Workstations** | Organization<br>Workstation Name | Workstation Name, then Organization |

## New Search Access Points

❑ **Item Records**

- **Home branch** - You can search by and limit by the home branch of the item record. This access point was added to support floating collections.
- **Do not float** - You can limit a search to those items that cannot float to other organizations. See "Floating Collections" on page 49.

❑ **Invoices**

- **Linked invoices** - You can limit by linked invoices to find invoice records that are linked to other invoices in Polaris. When you right-click on an invoice in the results list, you can see all the invoices that are linked to the invoice.

❑ **Supplier record, Invoice, and Purchase Order**

- **Currency code** - You can limit by a specific currency code if you place orders with foreign vendors who use a different currency from your default currency.

❑ **Serial claims**

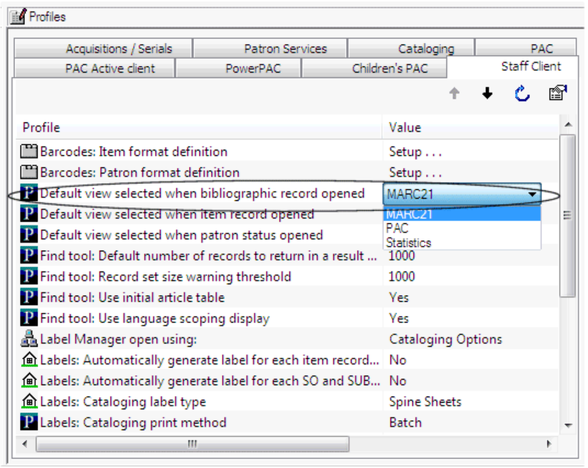
- **Issue status** - You can limit by the issue status of **Expected**.

## User-Defined Fields as Selections

When searching for patron records, you can search for and limit by user-defined fields by selecting from a list, if the user-defined fields have been associated with a list of values. See "User-Defined Fields in Patron Records: Improvements" on page 56.

# Preferred View for Bibliographic Record

You can now set a preferred view to be displayed when the Bibliographic Record workform is opened. Use the new Staff Client profile **Default view selected when bibliographic record opened** to set the view to **MARC21**, **PAC**, or **Statistics**. You can set this option at the organization, workstation, or staff member level. Staff member settings take precedence over workstation settings.

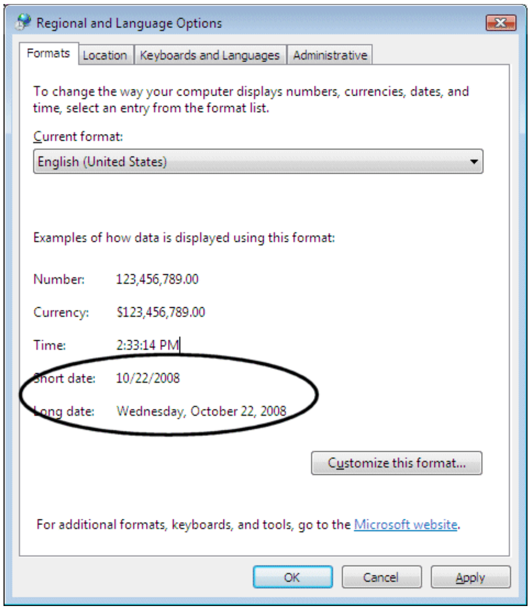


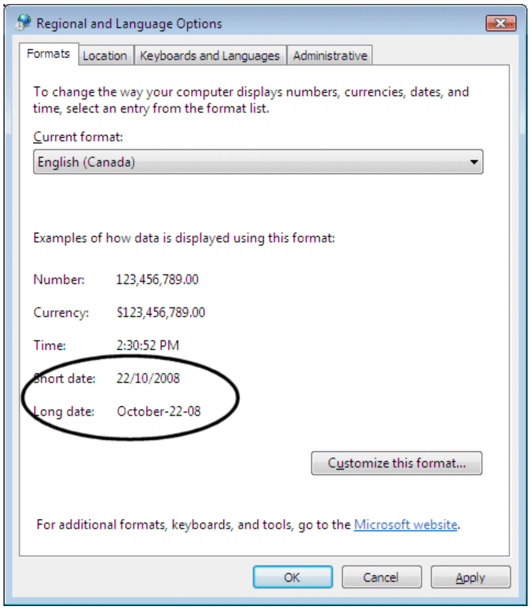
# Multiple Date Formats Supported

Polaris now supports various date formats. Set your workstations and servers to the date format you prefer. For example, on a Windows Vista workstation, select **Start, Control Panel, Regional and Language Options**, and select the format from the **Current format** list.

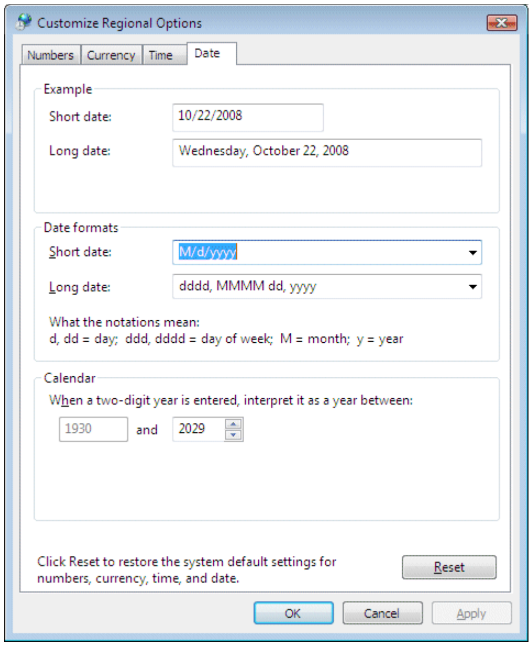
**Important:**
Client and server date format settings must match.

The illustrations show the English (United States) and English (Canada) formats.



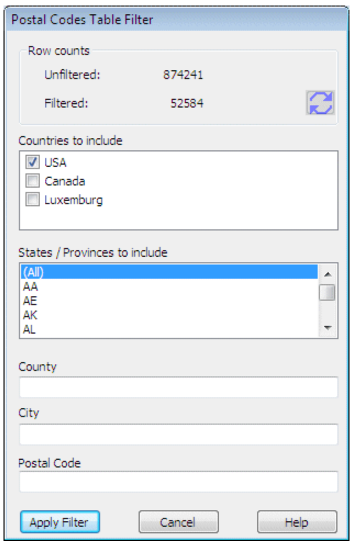

You can click **Customize this format** to set a different date format within the regional setting.




Date controls on Polaris workforms will support the format you choose.

# Postal Codes Table Filter

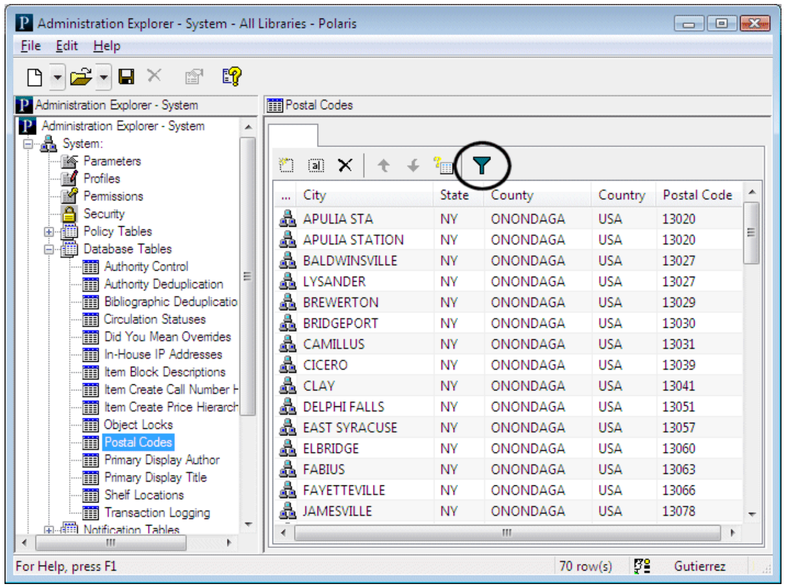
When you open the Postal Codes database table in Polaris Administration, you can now set a filter so that only relevant postal codes are loaded into the table instead of the entire set of of over 850,000 postal codes. The filter dialog box appears when you select the table.




You can filter the table by country, state/province, county, city, postal code, or a combination of these. Counts at the top of the filter dialog box show how many postal codes will be loaded with the filters you have set.

You can change the filter criteria and click the refresh button to see the new counts. The free-text fields, which are case-insensitive, accept the asterisk wild-card character * as well as the pound sign #, which stands for one character only. When you are ready to load the Postal Codes table, click **Apply Filter**. The filtered table is loaded.

As in previous versions of Polaris, you can add and update existing postal codes, and delete those that are not used in any records. From the table, you can open the filter dialog box by clicking the funnel icon.



# Acquisitions

The following changes were made in the Acquisitions subsystem for Polaris 3.5.

## Fiscal Year Rollover Improvements

### *Roll Over Pending POs and Open Invoices to Next Fiscal Year*

Before this change to the Fiscal Year Rollover Utility, you needed to release or delete all pending purchase orders and pay or delete all open invoices. Now you can roll over pending purchase orders, purchase order templates, and open invoices so they are linked to the new fund in the new fiscal year.

### *Funds in EDI Invoice Defaults Profile Update Automatically*

If your library does EDI ordering, the funds specified in the EDI Invoice Defaults profile are updated automatically with the fiscal year rollover process. The invoices are unlinked from the current year's funds and relinked to the new fiscal year's funds.

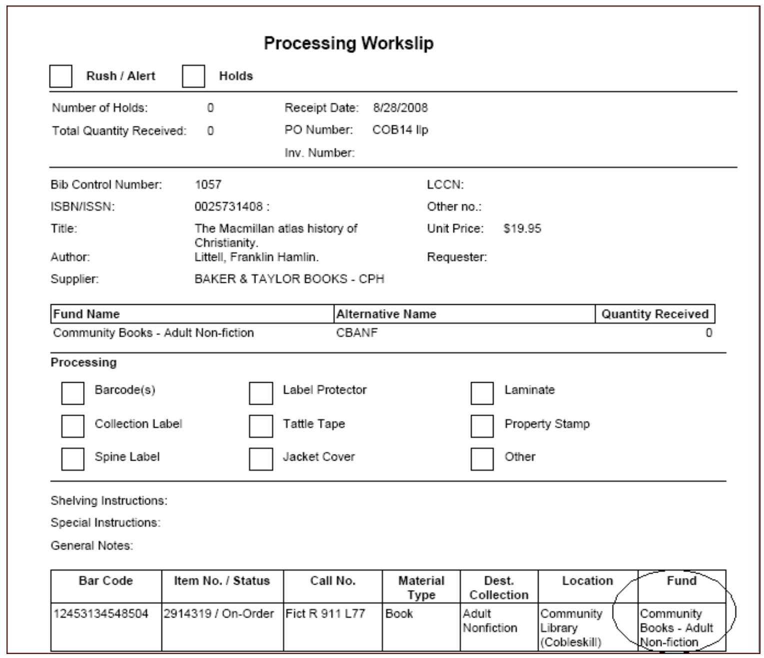
## Edit Purchase Order and Invoice Numbers

You can now edit the purchase order number and suffix on the Purchase Order workform until the purchase order is released. The invoice number and suffix can be edited on the Invoice workform until the Invoice is paid.

The purchase order or invoice number can be up to 30 characters long, and the suffixes can be up to 8 characters long.

# Additional Fund Information on the Purchase Order Workslip

A new Fund column was added to the item information on the Processing Workslip. If there are item records linked to purchase order line items, the item information includes the fund that was used to purchase the item. **Multiple** is displayed in the Fund column if multiple funds were used to purchase the item.



Processing Workslip

Rush / Alert   Holds

Number of Holds: 0   Receipt Date: 8/28/2008
Total Quantity Received: 0   PO Number: COB14 lip
Inv. Number:

Bib Control Number: 1057   LCCN:
ISBN/ISSN: 0025731408 :   Other no.:
Title: The Macmillan atlas history of Christianity.   Unit Price: $19.95
Author: Littell, Franklin Hamlin.   Requester:
Supplier: BAKER & TAYLOR BOOKS - CPH

| Fund Name | Alternative Name | Quantity Received |
|---|---|---|
| Community Books - Adult Non-fiction | CBANF | 0 |

Processing

Barcode(s)   Label Protector   Laminate
Collection Label   Tattle Tape   Property Stamp
Spine Label   Jacket Cover   Other

Shelving Instructions:
Special Instructions:
General Notes:

| Bar Code | Item No. / Status | Call No. | Material Type | Dest. Collection | Location | Fund |
|---|---|---|---|---|---|---|
| 12453134548504 | 2914319 / On-Order | Fict R 911 L77 | Book | Adult Nonfiction | Community Library (Cobleskill) | Community Books - Adult Non-fiction |

# Linking Invoices

If you need to make adjustments to a paid invoice, you can now link another invoice to it. An invoice may have multiple invoices linked to it. A new menu option, **Tools, Link, Invoice** and a link invoices button have been added to the Invoice workform. You can also unlink these invoices if they no longer need to be linked.

Linking invoices is a method for tracking additional transactions (payments or credits) to the original invoice. If you make modifications to one invoice, the changes do not affect the other invoices linked to it.

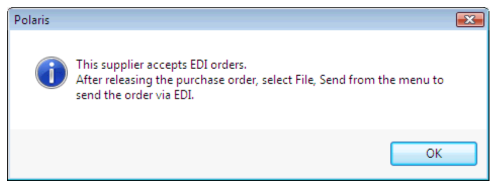
**Note:**
You can search for linked invoices. See "New Search Access Points" on page 13.

# Increased Length of Notes Fields in Supplier Record

The General and Plan Notes fields in the Supplier workform are now each 400 characters. When you type the notes, the text wraps and you can use the scroll bar to view or edit the notes.

# Message Alert When Releasing an EDI Order

If you release a purchase order linked to a supplier that accepts EDI orders, a message alerts you that you need to select **File, Send** to send the order via EDI.




# Close a Purchase Order

You can close a purchase order when all purchase order segments are canceled or received.

# Currency Conversion

Polaris Acquisitions has added currency conversion for foreign vendors. Each Polaris customer establishes a base currency, and currency conversion takes place within Polaris.

**Important:**
Do not make any changes to your currency regional settings in Windows. Your base currency is always in dollar format (with $ at the left and a decimal point before the last two digits).

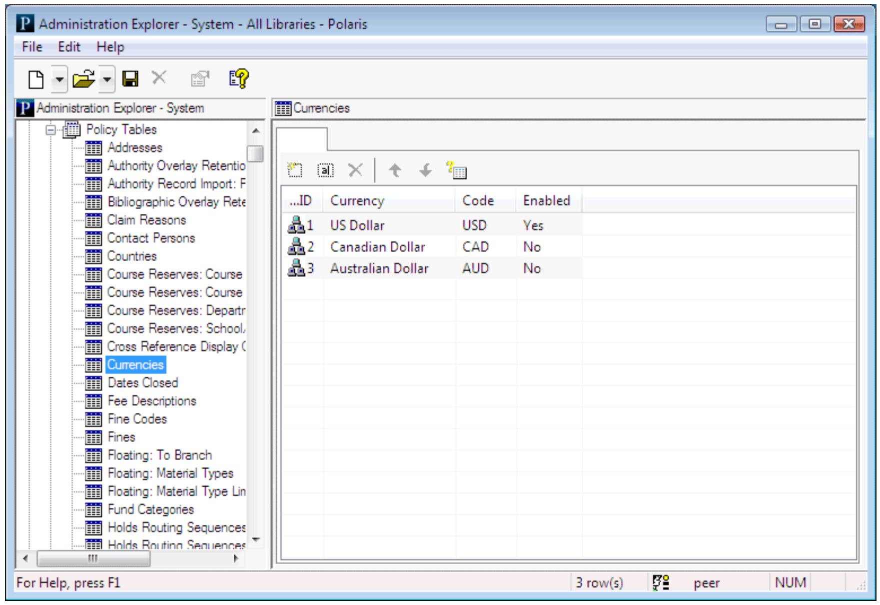
**Tip:**
You can search for suppliers, purchase orders, and invoices by foreign currency. See “New Search Access Points” on page 13.

If you order materials from foreign suppliers, you select the currency for each foreign supplier in the Supplier Record workform. All purchase orders, purchase order line items, invoices and invoice line items that are linked to the foreign supplier will display amounts in the foreign currency. However, the transactions against the funds will always be converted and posted in the library's base currency.

To ensure that the exchange rate is current, you can edit the exchange rate. Select **Utilities, Update Currency Exchange Rates** on the Polaris Shortcut bar. There is a new permission for editing the exchange rate: **Adjust currency exchange rate.**

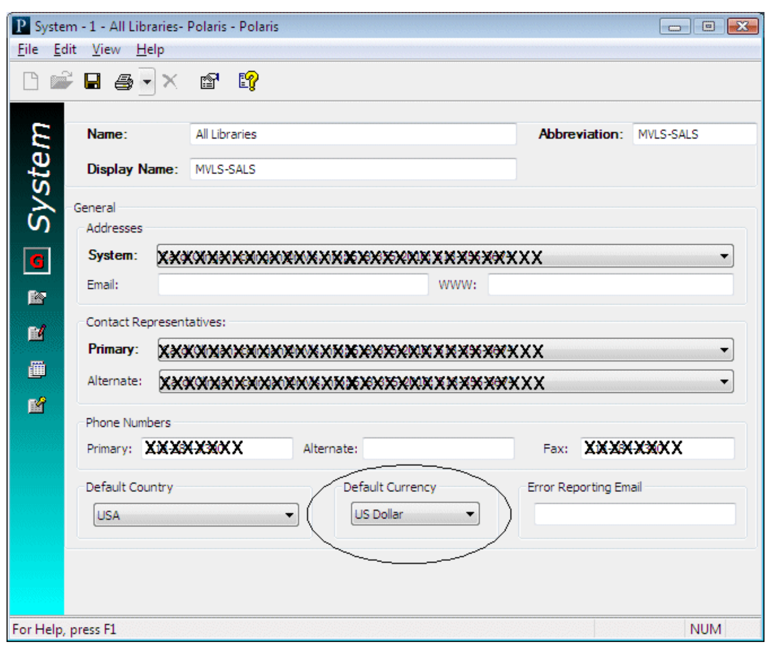
If you order from foreign vendors, set up currency conversion as follows:

1. Enable the foreign currencies in the new **Currencies** policy table at the System Level in Polaris Administration. Select the currency and click [icon] to open the dialog box, and select **Yes** in the **Enabled** box. If you need to add a currency other than US Dollar, Canadian Dollar, or Australian Dollar, click [icon].



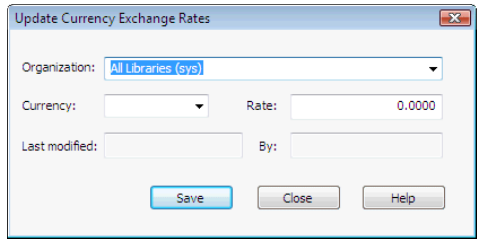

**Tip:**
To edit the System workform, select **Administration, Explorer, System** from the Polaris Shortcut Bar. Select the **System**, right-click, and select **Edit**. The system workform appears.

2. If your base currency is other than U.S. Dollars, select the currency in the **Default Currency** box in the System Workform in Polaris Administration.

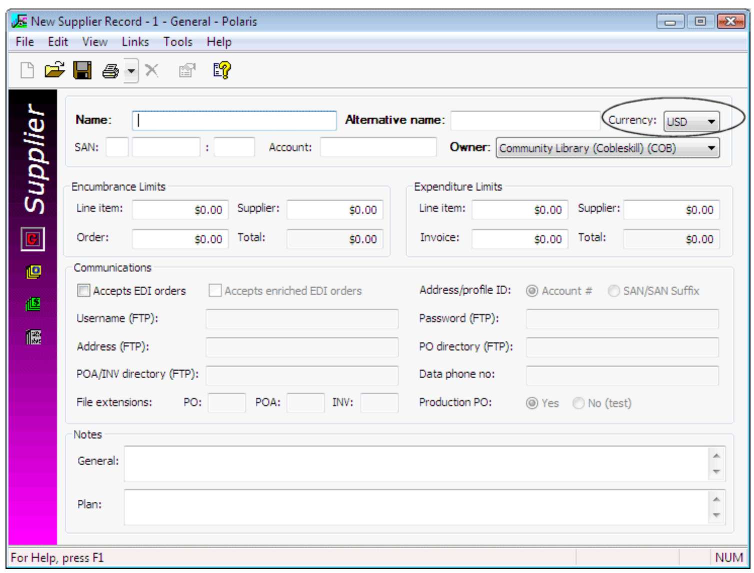


3. Update the currency exchange rate in the Update Exchange Rate table (available from the Polaris Shortcut Bar, **Utilities** menu). You can select the system or library for which you want to update the currency rate, but not a branch. Your default currency does not display; it is always 1.0000 in the database and all foreign currencies are calculated against the base currency.

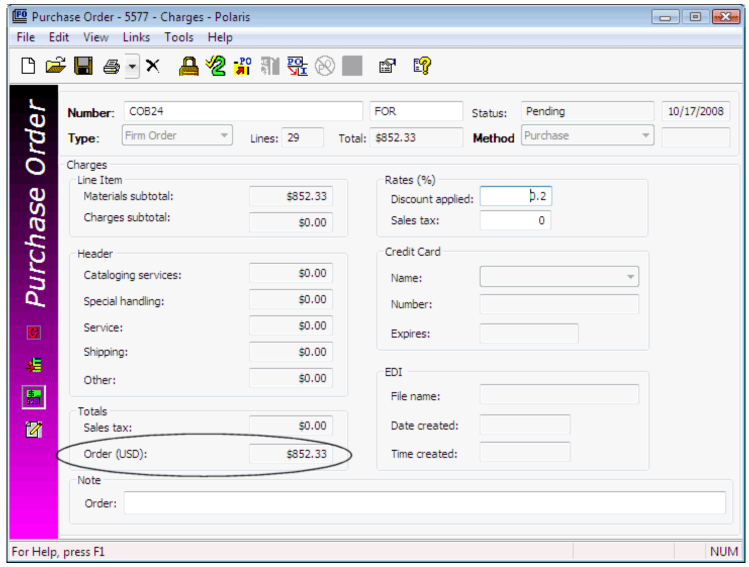
   **Note:**
   You can see all the changes to the currency exchange rate by running the Currency Exchange Rates Report.



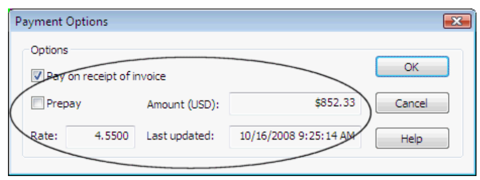

4. For any foreign vendors, select the currency in the Supplier record workform.

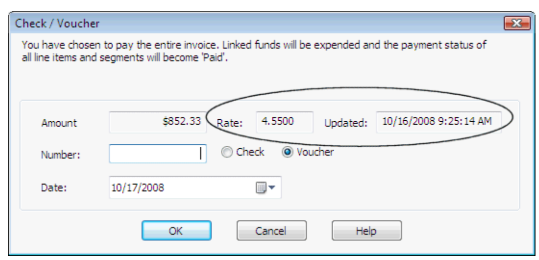



When you link to a foreign supplier with a currency other than the default currency, the amounts are displayed in the foreign currency with the currency code in parentheses in the Purchase Order, Purchase Order Line Item, Invoice, Invoice Line Item.




In addition, the Payment Options and Check/Voucher boxes display the currency code, current exchange rate, and the date the exchange rate was last updated.




If you are using a supplier that has a currency other than the default currency, these transactions are converted to the default currency using the current exchange rate (as most recently defined in the Update Currency Exchange Rates dialog box):

- Release a purchase order and select **Pay on receipt of invoice** - Encumbrance. The unit price is converted.
- Release a purchase order and select **Prepay -** Expenditure/Debit
- Release a purchase order with a fund type of **Deposit Account -** Expenditure/Debit
- Pay an invoice line item segment, line item, or the entire invoice - Expenditure/Debit and a Disencumbrance (if there is a linked purchase order)

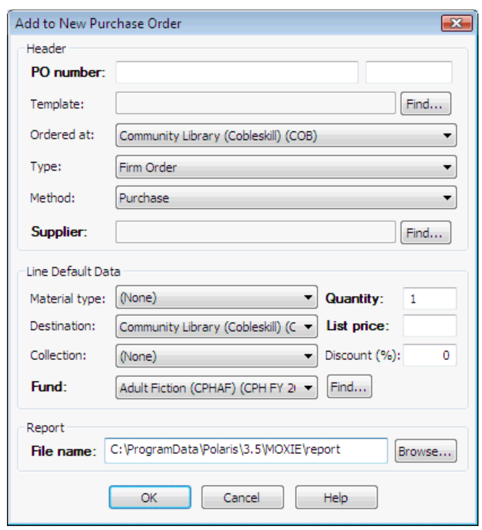
- Pay a regular invoice - If there is a linked purchase order line item, the original purchase order line item amount is disencumbered, and the invoice line item is paid- Disencumbrance and Expenditure.
- Cancel a purchase order line item segment, a purchase order line item, or an entire purchase order - Disencumbrance. The amount disenbumbered is equal to the original amount encumbered.
- Credit a paid invoice line item segment, invoice line, or the entire invoice - Unexpenditure
- Cancel a prepaid purchase order line item segment, purchase order line item, or the entire purchase order - Unexpenditure

# Currency Exchange Rates Report

The new Currency Exchange Rates Report lists all currencies your library uses and any modifications that were made to the exchange rates.

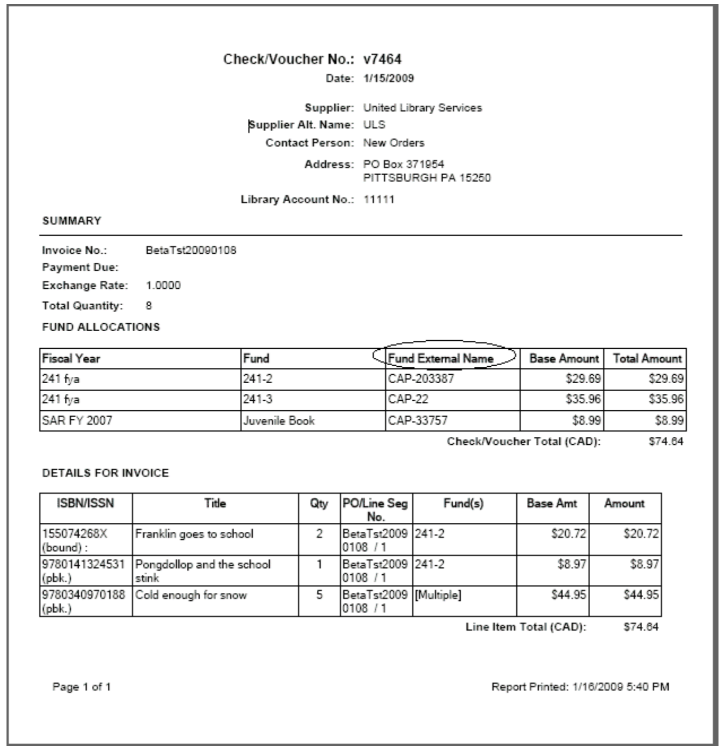
# Bulk Add to Purchase Order/Selection List Report

When you specify the name for the bulk add error report, no message appears if there is already an error report with the same name because the new report is saved with a distinct date/time stamp.



# Invoice Voucher

The Invoice Voucher now includes a column for the fund's external name.



Check/Voucher No.: v7464
Date: 1/15/2009

Supplier: United Library Services
Supplier Alt. Name: ULS
Contact Person: New Orders
Address: PO Box 371954
PITTSBURGH PA 15250

Library Account No.: 11111

SUMMARY

Invoice No.: BetaTst20090108
Payment Due:
Exchange Rate: 1.0000
Total Quantity: 8

FUND ALLOCATIONS

| Fiscal Year | Fund | Fund External Name | Base Amount | Total Amount |
|---|---|---|---|---|
| 241 fya | 241-2 | CAP-203387 | $29.69 | $29.69 |
| 241 fya | 241-3 | CAP-22 | $35.96 | $35.96 |
| SAR FY 2007 | Juvenile Book | CAP-33757 | $8.99 | $8.99 |

Check/Voucher Total (CAD): $74.64

DETAILS FOR INVOICE

| ISBN/ISSN | Title | Qty | PO/Line Seg No. | Fund(s) | Base Amt | Amount |
|---|---|---|---|---|---|---|
| 155074268X (bound) : | Franklin goes to school | 2 | BetaTst2009 0108 / 1 | 241-2 | $20.72 | $20.72 |
| 9780141324531 (pbk.) | Pongdollop and the school stink | 1 | BetaTst2009 0108 / 1 | 241-2 | $8.97 | $8.97 |
| 9780340970188 (pbk.) | Cold enough for snow | 5 | BetaTst2009 0108 / 1 | [Multiple] | $44.95 | $44.95 |

Line Item Total (CAD): $74.64

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# United Library Services (ULS) Accepts EDI and Titles to Go

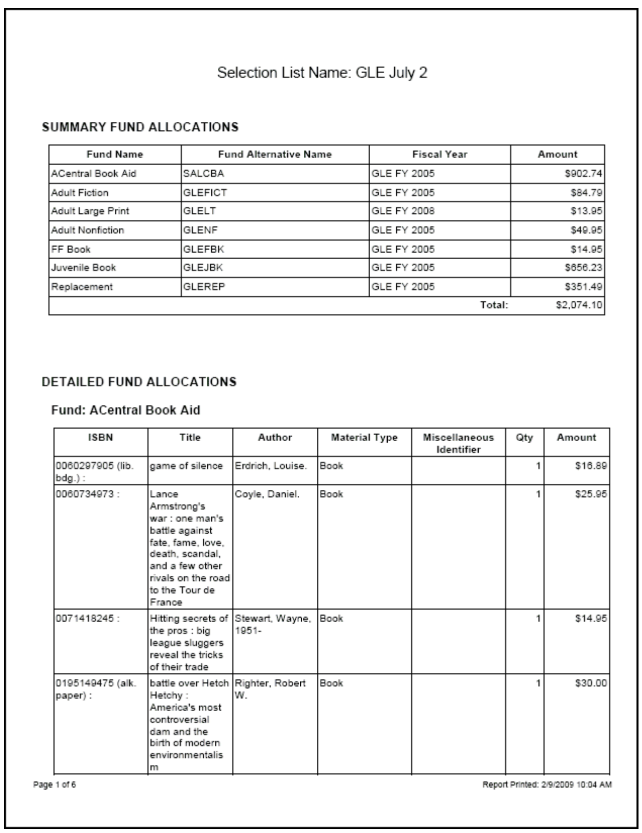
You can now send EDI orders to the Canadian supplier, United Library Services (ULS). In addition, you can send Titles to Go queries to ULS and receive information regarding title availability.

# Selection List Fund Allocations Report

You can use the Selection List Fund Allocations report, available from the Selection List workform, to see the funds that are allocated to pay for the selected titles. You can print the Selection List Fund Allocations report from the Selection List workform by selecting **File, Print**, or from the Find Tool results list by right-clicking on a selection list and selecting **Print** from the context menu.

The Selection List Fund Allocations Report is divided into two sections:

- **Summary Fund Allocations** - The top summary section lists the fund name, alternative name, and fiscal year for each fund allocated on the selection list. It also lists the total amount for all line items on this selection list that use this fund, and a total for all the funds.
- **Detailed Fund Allocations** - This section follows the summary and groups all line items under the fund name that is allocated to pay for them. It lists the ISBN, title, author, material type, miscellaneous identifier, quantity, and amount for each line item. If more than one fund is associated with a selection list line item, the title appears in the details section under each of the funds with the specific amount allocated for that fund.



Selection List Name: GLE July 2

SUMMARY FUND ALLOCATIONS

| Fund Name | Fund Alternative Name | Fiscal Year | Amount |
|---|---|---|---|
| ACentral Book Aid | SALCBA | GLE FY 2005 | $902.74 |
| Adult Fiction | GLEFICT | GLE FY 2005 | $84.79 |
| Adult Large Print | GLELT | GLE FY 2008 | $13.95 |
| Adult Nonfiction | GLENF | GLE FY 2005 | $49.95 |
| FF Book | GLEFBK | GLE FY 2005 | $14.95 |
| Juvenile Book | GLEJBK | GLE FY 2005 | $656.23 |
| Replacement | GLEREP | GLE FY 2005 | $351.49 |
| | | Total: | $2,074.10 |

DETAILED FUND ALLOCATIONS

Fund: ACentral Book Aid

| ISBN | Title | Author | Material Type | Miscellaneous Identifier | Qty | Amount |
|---|---|---|---|---|---|---|
| 0060297905 (lib. bdg.) : | game of silence | Erdrich, Louise. | Book | | 1 | $16.89 |
| 0060734973 : | Lance Armstrong's war : one man's battle against fate, fame, love, death, scandal, and a few other rivals on the road to the Tour de France | Coyle, Daniel. | Book | | 1 | $25.95 |
| 0071418245 : | Hitting secrets of the pros : big league sluggers reveal the tricks of their trade | Stewart, Wayne, 1951- | Book | | 1 | $14.95 |
| 0195149475 (alk. paper) : | battle over Hetch Hetchy : America's most controversial dam and the birth of modern environmentalis m | Righter, Robert W. | Book | | 1 | $30.00 |

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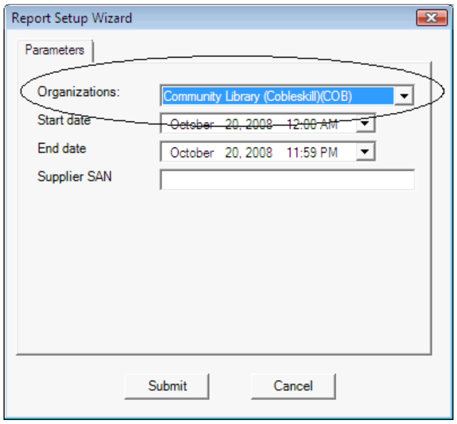
# Electronic Purchase Order Acknowledgement by Branch

You can now select the branch when printing the Electronic Purchase Order Acknowledgement report.

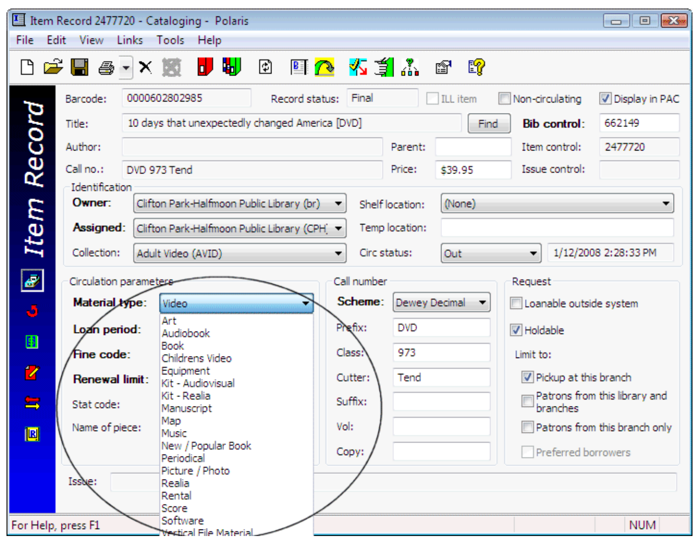


# Cataloging

The following changes were made in the Cataloging subsystem for Polaris 3.5.

## Item Records - Numeric IDs Removed

The numeric IDs have been removed from the display for material type, loan period, fine code, statistical code, shelf location, and item block, and the lists are displayed in alphabetical order. You can type the first letter of the entry to find it in the list. For example, put the cursor in the **Material type** box, type **B** and **Book** appears in the box. This change also applies to other records and controls that use these fields, such as the Purchase Order Line Item workform, the bulk change dialog box and the item create dialog box.

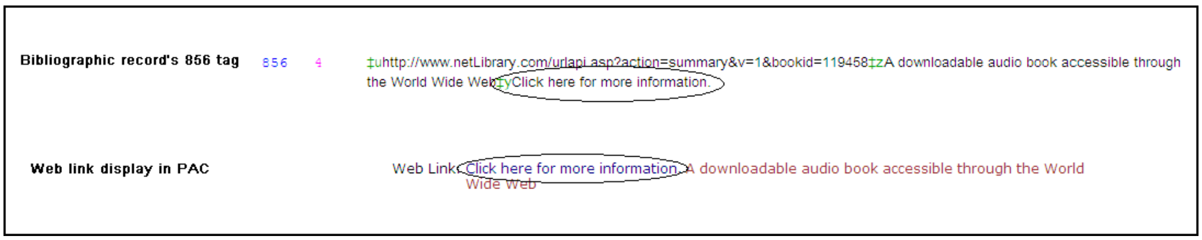


# Web Links Display in the PAC

The clickable Web link text that displays in the PAC is determined by the subfields in the 856 tag in the bibliographic record:

**Note:**
If there is text in the 856$z, it displays as a note but not part of the Web link.

- **856$y - Link Text** - If the bibliographic record has an **856$y**, the text in the first occurrence of this tag is used for the Web link display instead of the URL in the **856$u**.
- **856$3 – Material Specified** - If the bibliographic record does not have an **856$y**, but it does have an **856$3**, the text in the first occurrence of this tag is used for the Web link display instead of the URL in the **856$u**.
- **856$u - URL** - If the bibliographic record does not have an **856$y** or an **856$3**, the Web link text that displays is the URL in the **856$u**.

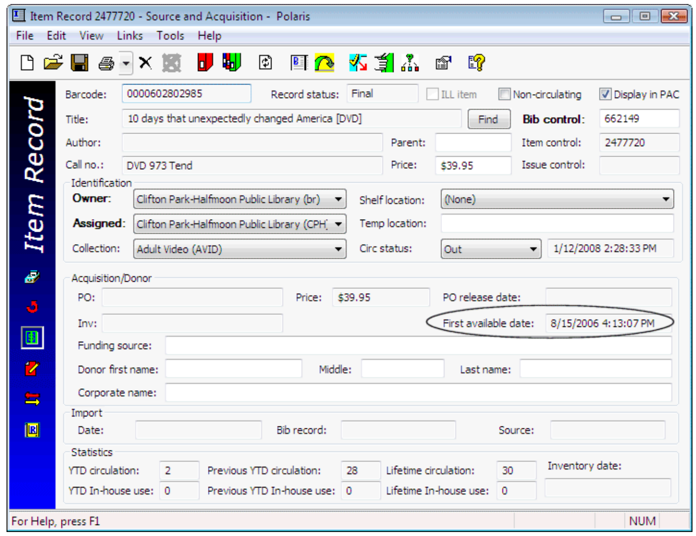



# Item Records - Button and Keyboard Shortcut Links to Bib Record

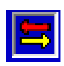
The Item Record workform has a toolbar button and shortcut (**Ctrl+G**) to open the linked bibliographic record.

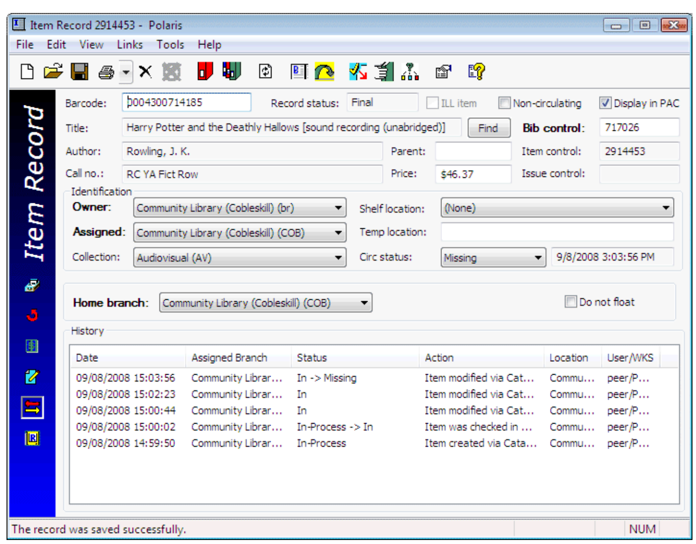
# Item Records - First Available Date on Acquisitions View

The **First available date** field was added to the Item Record workform - Source and Acquisition view. Previously, this date appeared only on the Item Record Properties sheet.




# Item Records - New History View

The Item Record workform has a new Circulation History view that displays all the status changes for the item record. Select **View, History** or click . In addition to the circulation history, the new view includes a **Do not float** option and a **Home Branch** selection. Select **Do not float** if you do not want the item to be part of floating collections. See "Floating Collections" on page 49. If you have the Cataloging permission **Item records: Modify history view,** you can modify these fields.



The following transactions are recorded in the Circulation History view of the Item Record workform:

- Item created via Acquisitions
- Item created via Circulation
- Item created via Serials
- Item created via Acquisitions PO Line Item processing
- Item created via Acquisitions Invoice processing
- Item updated via PO Line Item Receive processing
- Item updated via PO Line Item Segment Undo Receive processing
- Item created via ILL processing
- Item created via Cataloging
- Item created via NCIP create processing
- Item modified via Bulk Change from record set
- Item modified via Cataloging
- Item modified via NCIP accept item processing
- Item was checked in
- Item was checked in which was lost
- Item was checked out
- Item was declared lost
- Item claim was deleted
- Claim was made on Item
- Item status modified after check in via manage item dialog
- Item shelf location modified after check in via manage item dialog
- Item returned via ILL processing
- Item send in transit via Removing from Course Reserve
- Item modified via PO Line Item Segment Receive processing
- Item was checked in when it was not already Out
- Item modified by automatic billed to lost processing
- Item modified because item was held and request pickup branch was modified
- Item status changed to Routed by creation of linked route list piece
- Item modified by modification of linked route list piece
- Item modified via Floating Collections processing
- Item was checked out for renewal
- Item marked for deletion
- Item undeleted

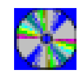
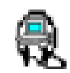
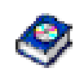
For each transaction listed in the history, the following information regarding the transaction is displayed:

**Note:**
Set the system-level Cataloging parameter **Item record history time threshold** to limit the amount of time transactions are kept in the history view. The default setting is 365 days.

- The date and time of the transaction
- The branch (assigned branch) - The assigned branch appears if the Cataloging parameter **Item record history display assigned branch** is set to **Yes**.
- The status of the item after the transaction is completed
- The action taken on the item
- The location (branch where the transaction took place)
- The user who completed the transaction and the workstation on which the transaction was processed
- The patron record ID - The patron record ID appears if the Cataloging parameter **Item record history display patron link** is set to **Yes**.

# New Types of Material Codes

New types of material (TOM) codes are now available to better represent titles with multiple types of materials (for example, a book with a CD). The new TOMs allow more precision in the display of icons in the Polaris PowerPAC. In addition, you can limit searches for bibliographic records in the Polaris Find Tool and in the PAC using these new TOMs.

| *Format* | *Code* | *Bib Leader* | *Bib 006* | *Bib 007* | *Bib 008* | *PAC Icon* |
|---|---|---|---|---|---|---|
| Blu-ray Disc | brd | */06=g* | | */00=v<br>/01=d<br>/04 = s or z<br>/05=a<br>/06=i<br>/07=z* | */33=v* |  |
| AudioEbook | aeb | */06=i* | */00=m<br>/09=h* | */00=s<br>/12=e<br>/13=d<br><br>AND:<br><br>/00=c<br>/01=r<br>/05=a<br>(2 are required)* | */23=s* |  |
| Book & CD | bcd | */06=i or a* | */00=a* | */00=s<br>/01=d<br>/12=e<br>/13=d* | |  |
| Book & Cassette | bcs | */06=i or a* | */00=a* | */00=s<br>/01=s<br>/12=<br>/13=e* | |  |

# Bulk Change Prompts

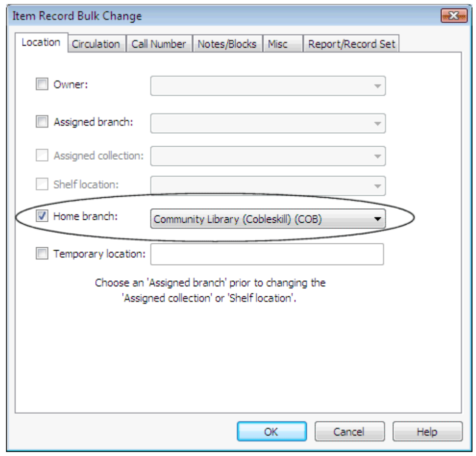
In Polaris Administration, you can set the new Cataloging profile **Item bulk change: Warning if changing Assigned or Home branch** to **Yes** to display a prompt when the Assigned Branch and Home Branch are being changed for multiple item records and the values are not equal. These settings are used in floating collection processing; see "Floating Collections" on page 49. The default setting is **No** (no prompt).

# Item Record Bulk Change

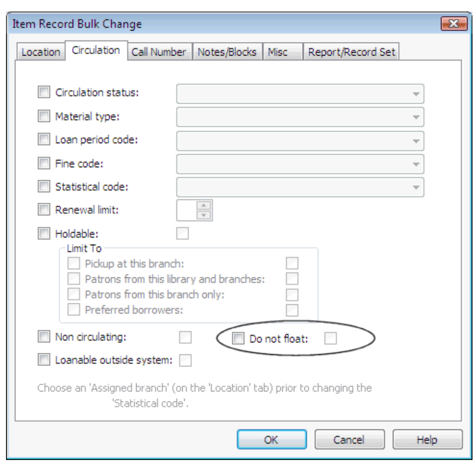
Two options were added to the Item Record Bulk Change dialog box to support floating collections:

**Note:**
For more information, see "Floating Collections" on page 49.

- ❑ The **Home branch** option was added to the Location tab of the Item Record Bulk Change dialog box. To change the home branch for multiple items, select **Home branch**, and select the branch from the list.




- ❑ The **Do not float** option was added to the Circulation tab of the Item Record Bulk Change dialog box. If you want to change the setting for the **Do not float** option, select the check box to the left of the option. Then, to change all the items so they cannot be part of a floating collection, select the box to the right of **Do not float**. To change all the items so they can float to a new assigned branch, leave the check box blank. See "Floating Collections" on page 49.




Also, you can now change the loan period codes and fine codes regardless of the items' assigned branch. See "Loan Period Codes and Fine Codes" on page 54.

# Item Record Prompts

In Polaris Administration, you can set the new Cataloging profile **Item Records: Warning if changing Assigned or Home branch** to display a message if either of these values is changed in an item record and the two values are not the same. These settings are used in floating collection processing; see "Floating Collections" on page 49. The default setting is **No** (no prompt).

# Item Templates - Serial, ILL, and On the fly

Item templates that begin with **Serial**, **ILL**, or **On the fly** require the same information as any other item record. This prevents item templates from being created when they do not have the required information for item records.

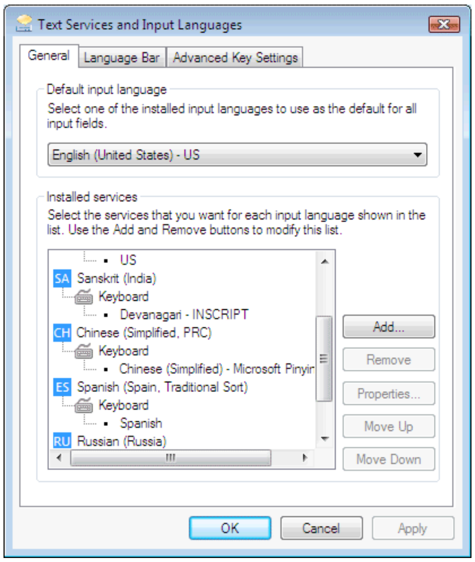
# Enter and Search for Diacritics and Special Characters

You can now use an Input Method Editor (IME) keyboard to enter diacritics and special characters in MARC records in the Bibliographic Record and Authority Record workforms. In addition, the Find Tool recognizes the characters in a search.

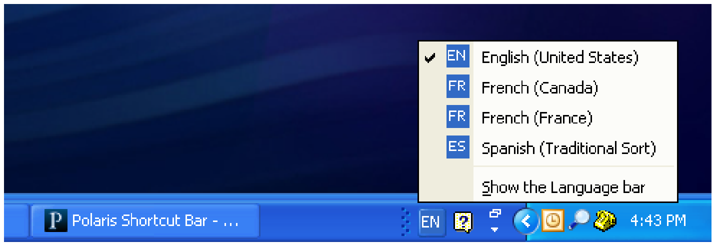
## *Use an IME Keyboard to Enter Diacritics*

**Tip:**
The steps for using IME keyboards differ slightly depending on which version of Windows you have installed. For more information on language keyboards, go to Microsoft's Web site: **www.microsoft.com**

To use an IME keyboard, go to **Control Panel, Regional and Language Options**, and select the **Keyboards and Languages** tab. Then select **Change Keyboards**. The Text Services and Input Languages dialog box appears.



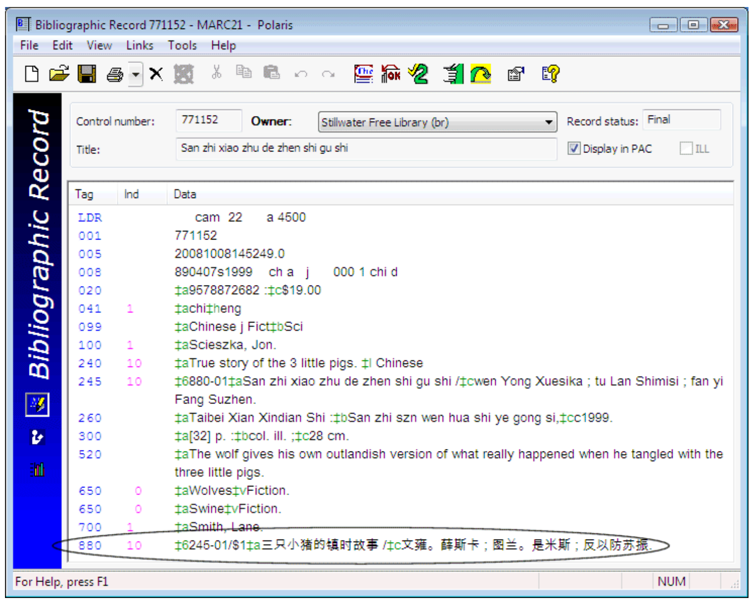
Select the language, and click **Add**. The languages appear in the Language Bar. You can switch among languages.



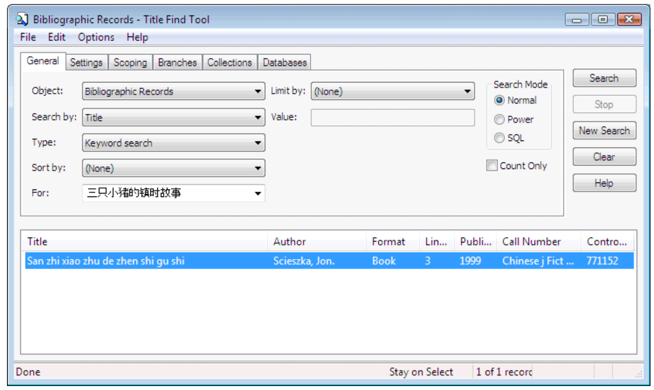

## *Search for MARC Records Using Diacritics and Special Characters*

You can search for MARC records in the Find Tool using non-Roman characters. Also, if you do a keyword search for bibliographic records using a vernacular script, Polaris returns bibliographic records with the vernacular script in the 880 tag, if the subfield $6 links to an indexed tag.

In the example below, the 880 tag contains vernacular script that is linked to the 245 tag, which is an indexed tag.



You can enter the vernacular script in the keyword title search, and the search results display the transliterated title from the 245 tag.




For more information on searching in the PAC, see "Searching with Diacritics and Vernacular Script" on page 67.

# Keyboard Shortcut for Linked Item Records

You can use the keyboard shortcut **Ctrl+T** to display all linked item records from the Bibliographic Record workform.

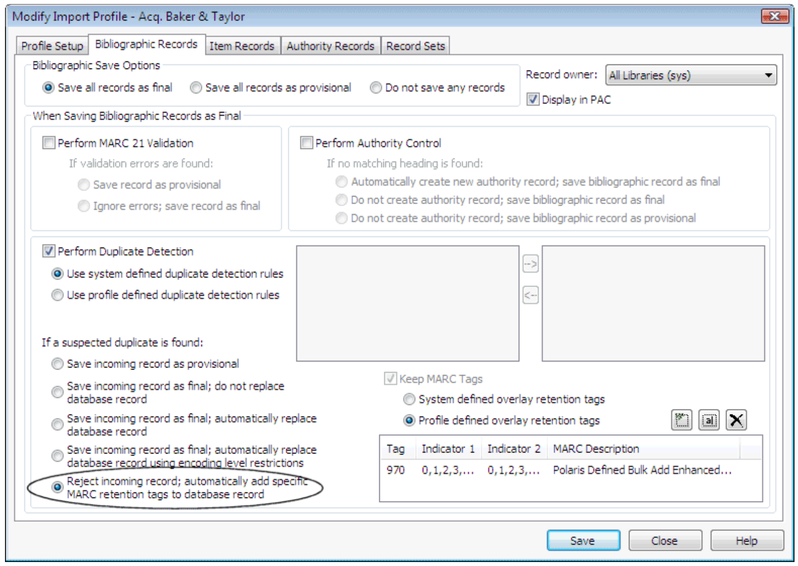
# Importing Bibliographic Records

A new option **Reject incoming record; automatically add specific MARC tags to database record** was added to the Bibliographic Records tab of the import window. Use this option to never allow the incoming duplicate records to overlay existing bibliographic records.

If a duplicate incoming record is found, it is deleted, but any system-defined or profile-defined tags are retained and appended to the database record. No other changes are made to the bibliographic record in the database.

This option is useful when you are importing bibliographic records for the following purposes:

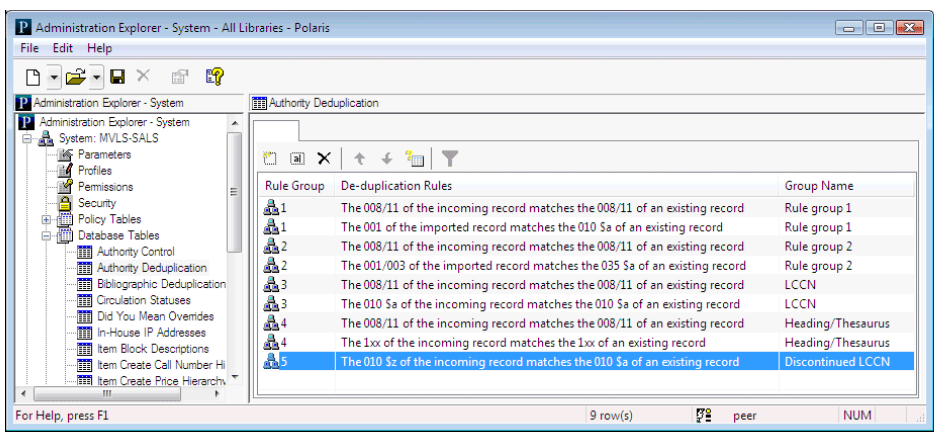
- **Adding copies to your library's holdings** - The embedded holdings data in the incoming duplicate bibliographic record is used to create item records for the additional copies.
- **Creating purchase orders by bulk adding** - The 970 tags in the incoming duplicate record are used to create purchase order line item segments.




# Authority Duplicate Detection Rule Added

A new duplicate detection rule was added to the Authority Deduplication database table in Polaris Administration:

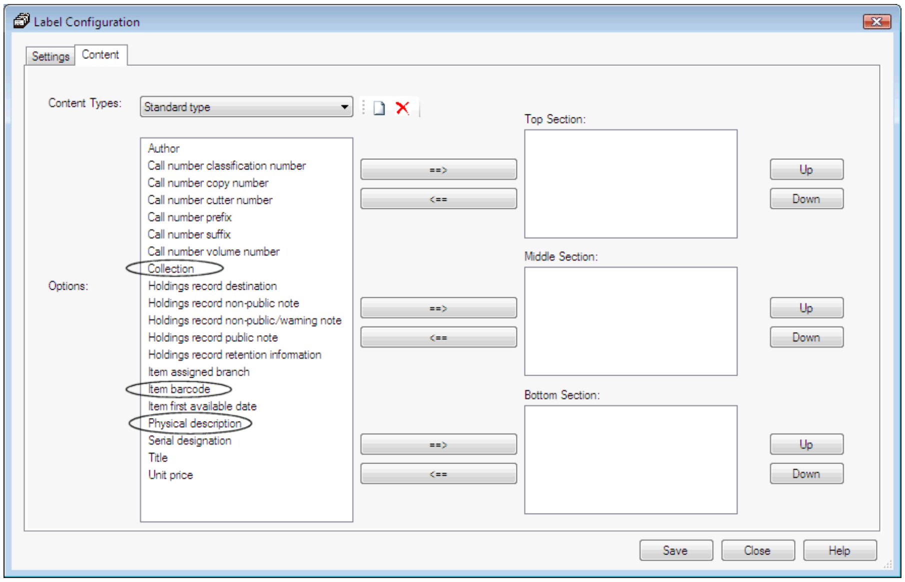
**The incoming record's 010 $z matches the existing record's 010 $a**



# New Label Content Options

Three new label content options were added to Label Manager:

- Collection
- Item barcode
- Physical description

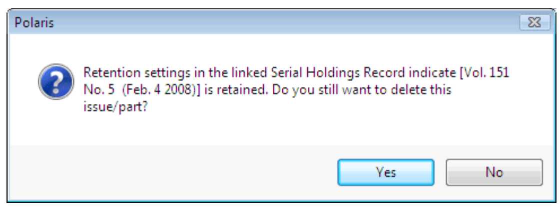


# Serials

The following changes were made in the Serials subsystem for Polaris 3.5.

## Delete Received Issues and Linked Items

You can delete received issues or parts even if they are linked to an item record. If the information in the linked serial holdings record indicates that the received issue should be retained, a message appears but you can still delete the issue. For example, if in October of 2008 you delete an issue that was received in February 2008, and the linked serial holdings record indicates the issues should be retained for one year, a message appears.

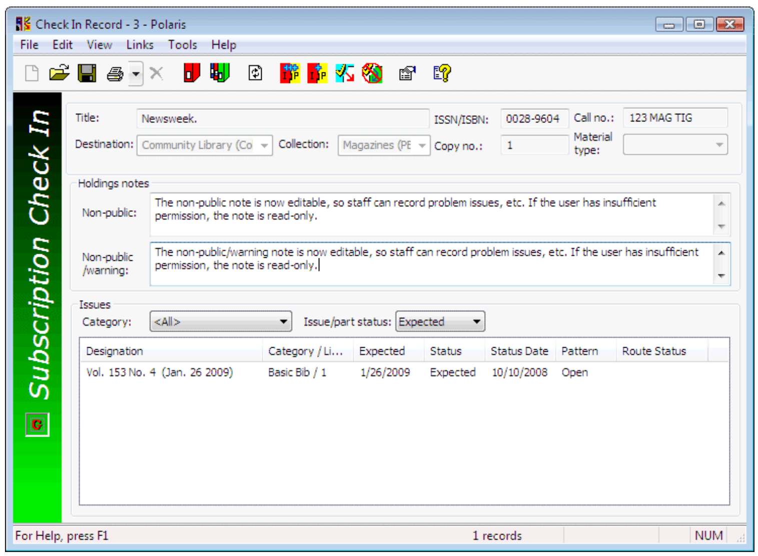



When you delete the issue or part, the linked item is deleted automatically. Also, when you delete an item record that is linked to a serial issue or part, the issue or part is deleted. The Acquisitions/Serials parameter, **Delete linked issue/part when serial item is deleted** must be set to **Yes** for the linked serial record to be deleted automatically.

# Note Fields Expanded and Editable on Check-in Workform

If you have the Polaris permission **Serial Holdings Record: Modify**, you can now add multiple lines of notes in the **Non-public Note** and the **Non-public/warning Note** fields on the Check-in workform (up to 600 characters). If you do not have permission to modify serial holdings records, the notes fields cannot be edited.

After editing the notes fields, select **File, Save**, click , or press **Ctrl+S** to save the Check-in workform. When you enter or edit the note in either of these fields and save the Check-in workform, the linked Serial Holdings Record is updated.




# Start Date Editable for Publication Patterns

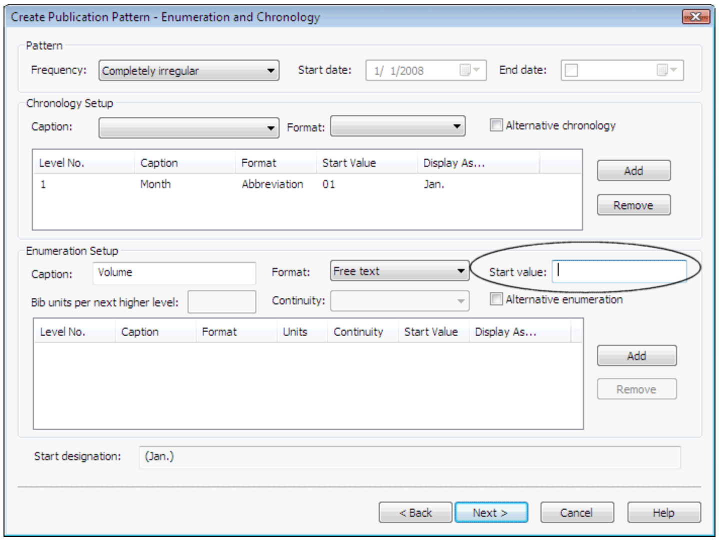
When you use a publication pattern template, you can now change the **Start Date**. The chronology and enumeration is updated automatically when you change the start date for the publication pattern.

# Serial Item Templates

Serial Item templates now require certain information to be saved. See "Item Templates - Serial, ILL, and On the fly" on page 35.

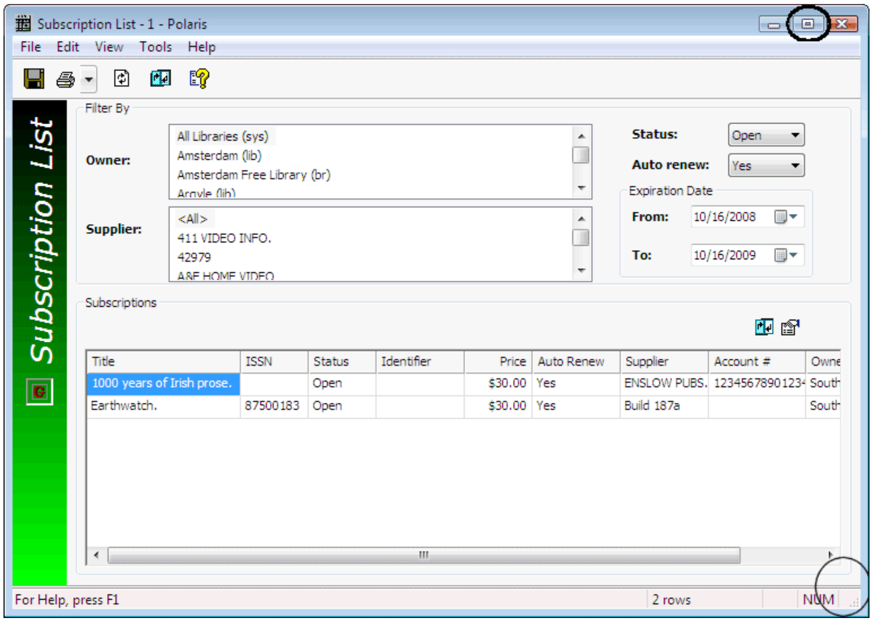
# Blank Start Value for Subscriptions with Free Text Enumeration

If you select **Free text** as the format for enumeration in a serials publication pattern, a start value is no longer required.



# Claim Alert List and Subscription List Workforms Resizable

You can now expand the Claim Alert List and Subscription List by dragging the lower right corner of the workform or clicking the resize button at the upper right.



# Patron Services/Circulation

Polaris 3.5 includes the following improvements in patron services and circulation.

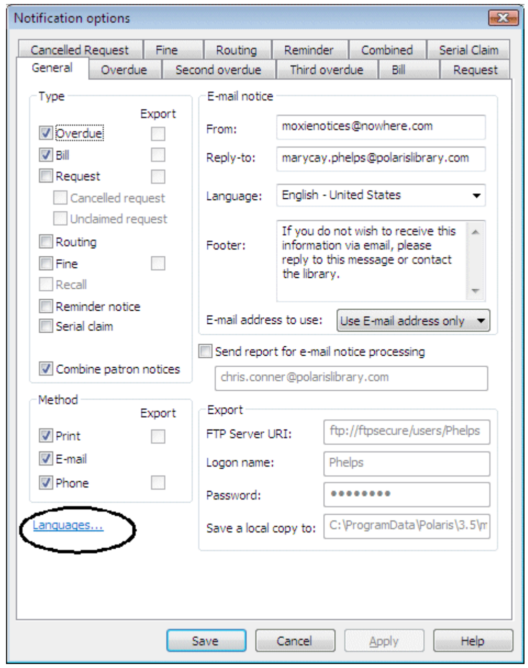
## Multilingual Notices

Polaris 3.5 offers multilingual notification. If you have purchased the appropriate license for Polaris PowerPAC, you can also send print and e-mail notices in English or the licensed language. Multilingual telephone notification is available by separate license at the system, library, and branch levels. Once set up, notices will be sent in the licensed language if the **Language** field in the Patron Registration workform is set to that language.

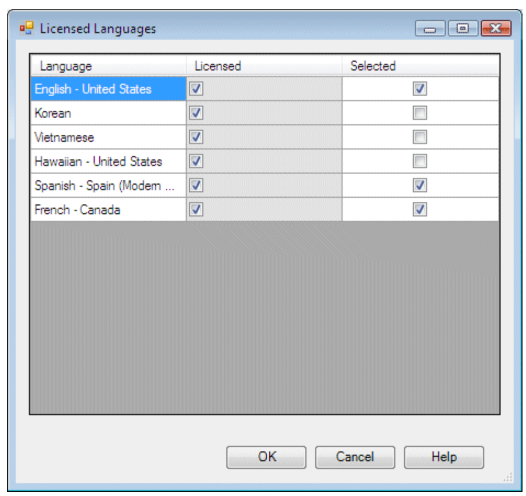
**Note:**
In Polaris PowerPAC or Polaris ActivePAC, a patron can also set the preferred language for notices. See "Preferred Language for Notices" on page 75.

Because branches can determine a notification library for each notice type, a notice may be generated for any patron from nearly any branch. If the patron designates a preference for notices in Spanish, for example, the patron might receive some notices in Spanish and others in English depending on how the notification library option is set. For example, if the notification library is set to **Lending branch**, some branches may have enabled Spanish notices and others not. If the notifying library has enabled Spanish notices, the notice is sent in Spanish. If system-wide consistent results are important, you will need to coordinate branch settings.

To enable multilingual notices, select **Parameters** for the organization in Polaris Administration, and click the **Notification** tab. Then double-click **Notification options**. On the Notification Options dialog box - General tabbed page, click the **Languages** link.




The Licensed Languages dialog box opens. Select (check) each language in which you will send notices.

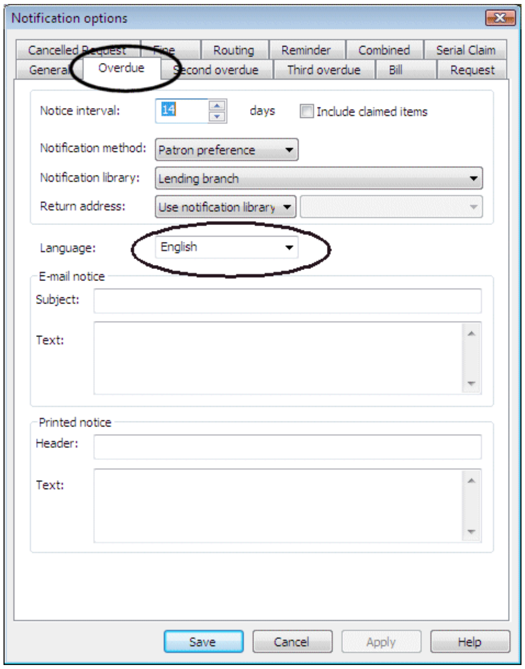



### Note:

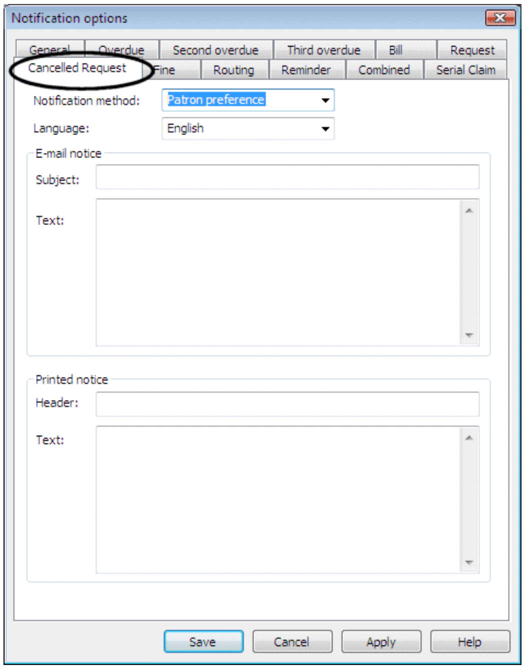
The read-only **Licensed** column shows which languages are licensed for your system. If notice translations are not available for a licensed language and you need notification in that language, contact your Polaris Site Manager.

You can customize the text of both English and licensed language notices by two methods:

- ❑ **On the Notification Options dialog box** - Click the tab for the type of notice you want to customize. Then select the language in which you want to customize the text. The illustration shows the Overdue tab.




As part of this development, you can customize the text on canceled request notices. These settings are located on a new separate tab of the Notification Options dialog box.



❑ **Using the new Language Editor** - Using this Web-based tool, you can customize notice headers, text and labels in both English and licensed languages, if available. See "Polaris Language Editor" on page 84.

> **Note:**
> If you customize notice text using the Notification Options dialog box, your changes are not evident in the Language Editor until you do an IIS reset, because the values there are cached. However, both tools are effective for customizing notices.

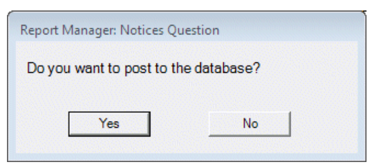
Some libraries using previous versions of Polaris may have already customized the text or format of certain notices. Polaris 3.5 provides default text and supports that text in the standard formats (Z-fold, post card, half page, and so forth). If you are upgrading from a previous version of Polaris, have customized any notices, and are implementing multilingual notification, you will need to check your customized text and formats.

For more information, see "Managing Notification" in online help (Patron Services Administration topics).

> **Note:**
> Language options do not apply to exported notices.

# Printing Notices

When you print notices from **Utilities, Reports and Notices**, the following prompt displays before the notices are produced.




You can take the following actions:

- Move the prompt dialog box to one side without responding, print the notices, then respond to the prompt.
- Click **Yes** to post the notices, then continue and print.
- Click **No** and print. You can then run the notices again and click **Yes** to post.

After the notices are printed, a copy of the file is saved on the workstation at **C:\Users\[user name]\Documents\My Reports**. You can use this file to edit and reprint notices in case of printer or network problems. The file is overwritten each time notices are generated.

# Telephone Notification Redesigned

Major design changes have been made to telephone notification (outbound telephony):

- **Human or SAPI voices** - You can now choose to use human-voice .wav files for outbound telephony messages, or computer-generated SAPI (Speech Application Programming Interface) voice .wav files that derive their message text directly from the Polaris database. If you want to use human-voice messages, you can use the default set of .wav files that Polaris provides or you can record your own. When you use computer-generated SAPI voice messages, the system converts message text stored in the Polaris database to speech. You may prefer to use SAPI voice messages because you can customize the stored message text in English, Spanish, or French, if licensed, using the Polaris Language Editor (see "Polaris Language Editor" on page 84). Telephone notification no longer uses .vox files.

  **Important:**
  If you currently use customized telephone notification messages and are upgrading to Polaris 3.5, alert your Polaris Site Manager before you upgrade. Your Site Manager may be able to provide .wav equivalents to your customized .vox files.

- **Speak patron name** - you can include the patron name in the greeting, give patrons the options of hearing specific titles in telephone overdue notices, hold notices, and canceled request notices, and specify the information included for the specific titles. See "New Parameters, Profiles, and Tables" on page 2 (Telephony - Outbound parameters).

- **Server installation** - Outbound telephony components are now part of Polaris server (not client) software installation. In Polaris Administration, a new Telephony server type has been added. You can have multiple telephony servers in one system, with separate settings for each server, and assign specific branches to each server. The outbound telephony options formerly located on the **Notification** parameters tab for an organization have been moved to the telephony server **Outbound** tab.

# Alternate Telephone Numbers for Telephone Notification

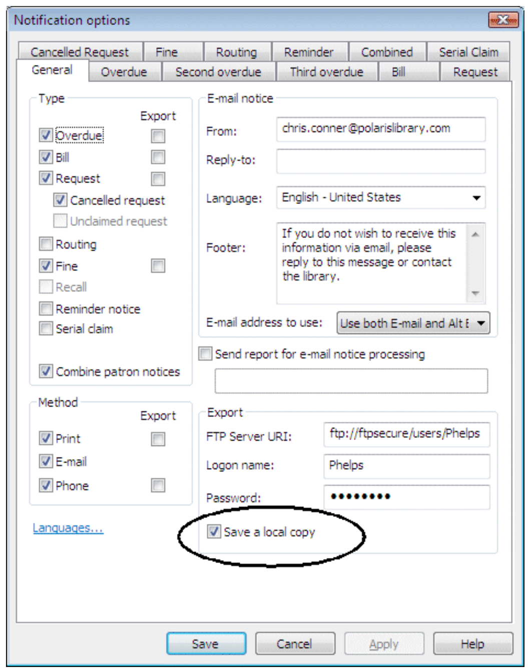
Polaris can now use any of the three **Voice Phone** fields in the patron record for telephone notification. If you select **Telephone 2** or **Telephone 3** as the patron's preference, be sure these numbers are supplied in the appropriate **Voice Phone** boxes. If the preferred number is not available when the notification call is made, the system tries a valid number from the remaining **Voice Phone** entries.

# Saving Local Copies of Exported Notices

On the Notification options dialog box, you can select the new option **Save a local copy** to save a copy of exported notices. When this option is selected, the copy is automatically saved on the Polaris server to **\ProgramData\Polaris\[version]\Logs\EXPORTNOTICES\Reports**

**Note:**
You cannot change the location, and local copies are not automatically deleted. You may want to delete old files periodically.

If you leave this option unchecked, the notice file is still placed in **C:\ProgramData\Polaris\[version]\Temp** on the Polaris server for FTP transmission, but no local copy is saved.




# Notification Reports

Two new reports list e-mail and telephone notification failures. They are available from the Polaris Shortcut Bar under **Utilities, Reports and Notices, Notices**. The **E-mail delivery failure report** lists e-mail notice failures, including the patron's barcode, patron's branch, patron's name and e-mail address, the failure reason, and the failure date. You can filter this report by date and reporting organization. Select **Telephony delivery failure report** for similar information regarding telephone notices.

In addition, the new Telephone Summary Report summarizes the number of calls made for each notice with their statuses, including failure reasons, in a specified date range. The report is organized by patron branch.

# Polaris Phone Attendant (Inbound Telephony)

Inbound telephony components are now part of Polaris server (not client) software installation. In Polaris Administration, a new Telephony server type has been added. You can have multiple telephony servers in one system, with separate settings for each server, and assign specific branches to each server. When you run the Phone Attendant configuration utility, you are prompted for the server name. In addition, if you have the appropriate license, Polaris Phone attendant now offers English, Spanish, and French prompts and messages. You can edit Phone Attendant messages with the Polaris Language Editor (see "Polaris Language Editor" on page 84).

# Floating Collections

Floating collections processing is the ability to allow certain items to remain at the branch where they were last checked in. If an item is called to another branch, for example to fill a hold request, the item will stay at that branch if it is returned there. The items move among branches as they are used, not according to a rotation schedule. This section is an overview of floating collections; for detailed set-up instructions, see "Setting Up Floating Collections" (Patron Services Administration topics) in staff client online Help.

Floating collections allow high-demand items to remain at high-traffic organizations, and collection contents to change as the demand changes. They also reduce the cost involved in returning materials to a single starting point after each use at another branch. You can check in an item at branch B that belongs to branch A and, rather than putting the item in transit back to A, let it remain at B. The item's Assigned Branch changes from branch A to branch B, and the reassigned item takes on branch B's circulation parameters.

Floating collection functions are optional. If your system consists of organizations that do their own purchasing and processing, and item ownership is important to each organization, you may not wish to implement floating collections. If your system does centralized purchasing and processing, then distributes items to branch organizations, you may find floating collections very useful.

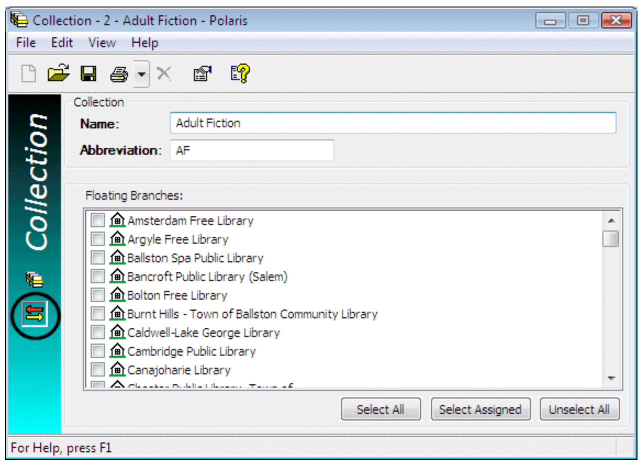
Some libraries allow nearly all items to float. Others exert more control over what items may float and to what locations. You can configure floating options at the branch level, so that each "home" branch can determine if any of its items are allowed to float and to which branches. In addition, you can determine that not all materials from all collections should be allowed to float; some material types should always return to their original home branch.

**Note:**
The **Home branch** field is new in the item record. If floating collections are not used, the item's home branch and assigned branch are typically the same. The home branch value is used only for floating collections and does not affect any other item processing.

In addition to these limits, individual items can be designated as exempt from floating. The item record includes a **Do not float** option that can be set manually for an individual item, through an item template, or by bulk change to an item record set. ILL items and reserve items with a reserve status of On Reserve or Permanent Reserve never float.

## *The Collection Workform and Floating Collections*

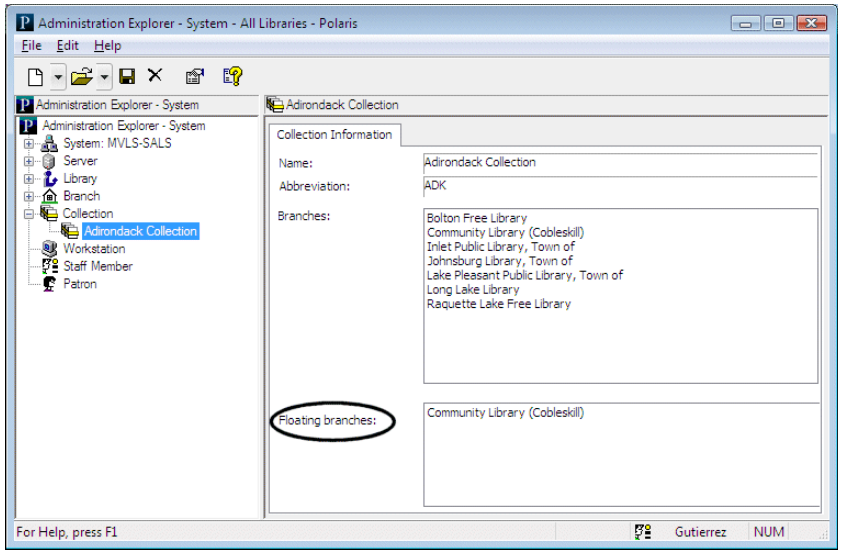
When you set up floating collections, you first determine what collections are eligible to float for which home branches. The Collection workform includes a new Floating Branches view for these settings.




You can select the potential home branches for this collection (those that may allow items from this collection to float), using one of these methods:

- Click **Select All** to select all the listed branches.
- Click **Select Assigned** to select all the branches that have been assigned to this collection. This option makes the floating branches selections the same as the assigned branches selections.
- Select the check boxes by individual branches.
- Use the **CTRL** or **SHIFT** key to select multiple branches at once.

When floating branches have been assigned, the Collection property sheet in Polaris Administration shows what branches have been assigned for floating.




## *Cooperative Considerations for Floating Collections*

Libraries and branches that participate in floating collections may want to have matching, reciprocal policies in order to help maintain a balance of items. If A allows items to float to B, B may want to put A on its floating list. If the participating organizations will float many items, you should also consider shelf integration. If two libraries do not use the same classification system, integrating floating items with the library's "home" holdings would be nearly impossible. But it may also be problematic even if they use the same classification system. For example, if two identical items are given radically different call numbers they will be shelved in different places.

Participating organizations may also want to consider using the same Polaris collections (all the organizations are assigned to a collection eligible to float). However, if the Patron Services parameter **Floating: Float items with no matching collection** is set to **Yes,** it is possible to receive a floating item where the receiving branch has no matching collection. Also, if you want items with no assigned collection to float, set the Patron Services parameter **Floating: Float items with blank Assigned Collection** to **Yes**. These two parameters have the following effects, and participating organizations without matching collections should decide which, if any, of these results are acceptable:

- **Floating: Float items with no matching collection = Yes**
  **Floating: Items with blank Assigned Collection can float = No**
  Result - An item may float to a new branch even if the receiving branch has no matching collection. The Assigned Branch will change to the receiving branch, and the Assigned Collection will change to null (blank). The item will not float again.
- **Floating: Float items with no matching collection = No**
  **Floating: Items with blank Assigned Collection can float = Yes**
  Result - Any item with no Assigned Collection will float normally.

- **Floating: Float items with no matching collection = Yes**
  **Floating: Items with blank Assigned Collection can float = Yes**
  Result - Any item with no Assigned Collection will float. As mismatched items float to a new branch, the number of items with no Assigned Collection will increase.
- **Floating: Float items with no matching collection = No**
  **Floating: Items with blank Assigned Collection can float = No**
  Result - These are the default settings. Items with no Assigned Collection do not float. Only items with matching collections will float. No mismatched items will be reassigned a null Assigned Collection value, because they do not float.

Finally, both home branches and receiving branches must set the Patron Services parameter **Floating enabled** to **Yes**. If this parameter is set to **No** for a branch, items will not float to the branch even if the home branch has selected the branch as a receiving branch. A home branch must also set this parameter to **Yes**; otherwise, no items will float even if the appropriate collections are designated as floating for the branch.

## *Floating Collection Policies*

For each branch that enables floating collections, three new policy tables set floating item policies:

- **Branches** - If items may float, where can they go? Use the **Floating: To Branch** policy table to set the possible receiving branches. The Home branch designated in the item record determines the branches to which its items may float.
- **Material types** - Are there certain material types that should not float, even if they belong to an eligible collection? Use the **Floating: Material Types** policy table to set the material types that should not float. The Home branch designated in the item record determines the material types that should not float.
- **Material type limits** - How many items of the same title (attached to the same bibliographic record) is the receiving branch willing to accept? Use the **Floating: Material Type Limits** table to set these limits. The receiving branch's settings determine separate limits for In items attached to the same title and items of any circulation status attached to the same title.

## *Circulation Processing for Floating Items*

Floating collection processing takes place at check-in. If floating is enabled for an item's home branch, when the item is checked in at a receiving branch, the system checks the collection, material type and receiving limit of items by material type. If all conditions permit floating, the item is checked in at the new branch, and the item's assigned branch automatically changes to the new branch. If the item does not match the floating conditions, the system puts it in-transit back to its home branch.

The system check for floating eligibility and the migration of the item to its new assigned branch are nearly the last steps in the check-in process. The process happens automatically; no message is displayed to the staff member when the item floats to its new assigned branch.

## *Item Record Workform and Floating Items*

The Item Record workform - Circulation History view shows the item's Home branch, the **Do not float** option, and the circulation history of the item as the item moves from branch to branch. See "Item Records - New History View" on page 30. (You can also see the circulation history for floating items linked to the same bibliographic record by selecting **Tools, Show Usage Statistics** in the Bibliographic Record workform.)

## *Serial Items and Floating Collections*

If you choose to allow serial items to float, the PAC compressed holdings statement may be inaccurate. You can minimize the difficulty by restricting a serials collection or material type from floating, or by creating serial item records with a template in which **Do not float** is checked.

## *Changes to Transactions for Floating Collections*

For check-in transactions, the new subtype **item float branchID** identifies the new branch when an item's assigned branch has changed because it has floated. The home branch and the item collection have also been added to check-in transactions.

The home branch has also been added to check-out and item modify transactions. An item modify transaction is logged when an assigned branch is changed due to floating.

## *Floating Collections Reports*

Three new reports help you manage floating collections:

- ❑ **Floating Items by Home Branch** -A statistical report that counts how many items from the home branch have floated to other branches. You can select one or more home branches and set a date range.
- ❑ **Floating Items by Assigned Branch** - A statistical report that counts how many items from other branches have been checked into the receiving branch. You can select one or more receiving branches and set a date range.
- ❑ **Floating Items Setup** - A summary report for the home branch showing the branch's floating settings. You can select one or more branches.

# Loan Period Codes and Fine Codes

These settings are no longer branch-specific. The same codes are used system-wide, although each branch can still specify its own combinations with patron codes. This change was made to improve data conversion processes and to facilitate other development such as floating collections. A new Patron Services parameter, **Fine and loan period defaults**, sets default values for fine amount, maximum fine, grace period, and loan period duration. The default values are used when you add a new fine code or loan period code to the system. This parameter is available at the system, library, and branch levels. You can change the settings for specific patron codes using the Fines policy table and Loan Periods policy table.

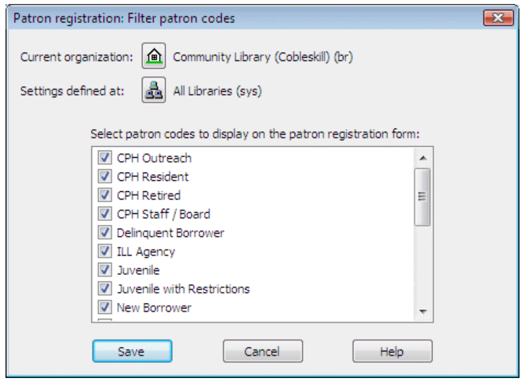
# Undefined Loan Period and Undefined Fine Amount

As in previous versions of Polaris, if a relationship between the patron code and loan period code cannot be found in the Loan Periods policy table, Polaris uses the setting in the system-level Patron Services parameter **Undefined loan period**, which is set at the system level. New in Polaris 3.5, this value is also used to automatically populate the table if a new branch or patron code is added.

Also new in Polaris 3.5, if for some reason a fine amount cannot be calculated, the setting for the system-level Patron Services parameter **Undefined Fine Amount** is used. This setting is also used automatically when a new organization or patron code is added to the Fines table.

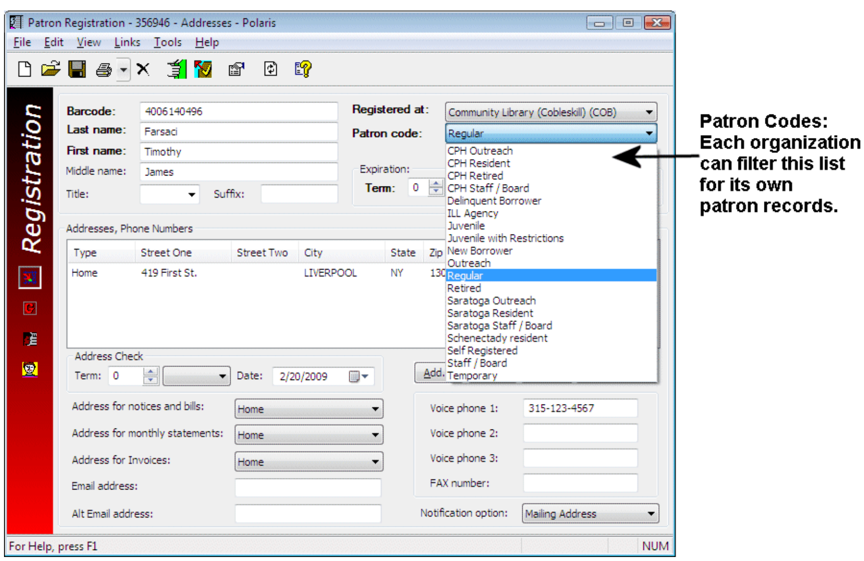
# Filtering the Display of Patron Codes

Using the new Patron Services parameter **Patron registration: Filter patron codes**, you can now specify which patron codes, as defined in the Patron Codes policy table, will actually display for selection in a specific organization's workforms. By default, all patron codes are selected for display.



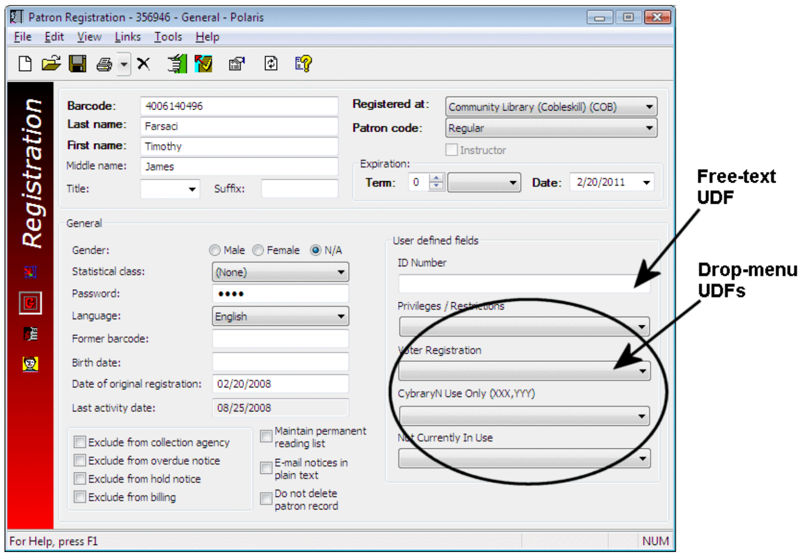

**Note:**
The organization icons at the top of the dialog box indicate whether the settings have been inherited. Initially they are inherited from the system-level settings. Once you change the settings at the branch level, they are no longer inherited from the system, even if the system-level settings are changed.

By checking or unchecking patron codes, you determine which codes are available for selection in tables and workforms such as the Fines policy table, Loan Periods policy table, and **Patron code** box on the Patron Registration workform. The illustration shows the Patron registration workform.



# User-Defined Fields in Patron Records: Improvements

As in previous versions of Polaris, your patron records can include up to five user-defined fields (UDFs). The UDFs are set up when Polaris is implemented. You can define UDFs as free-text fields (as in previous versions) or as drop-menu fields with selectable options (new in Polaris 3.5). The illustration shows an example in the Patron Registration workform.



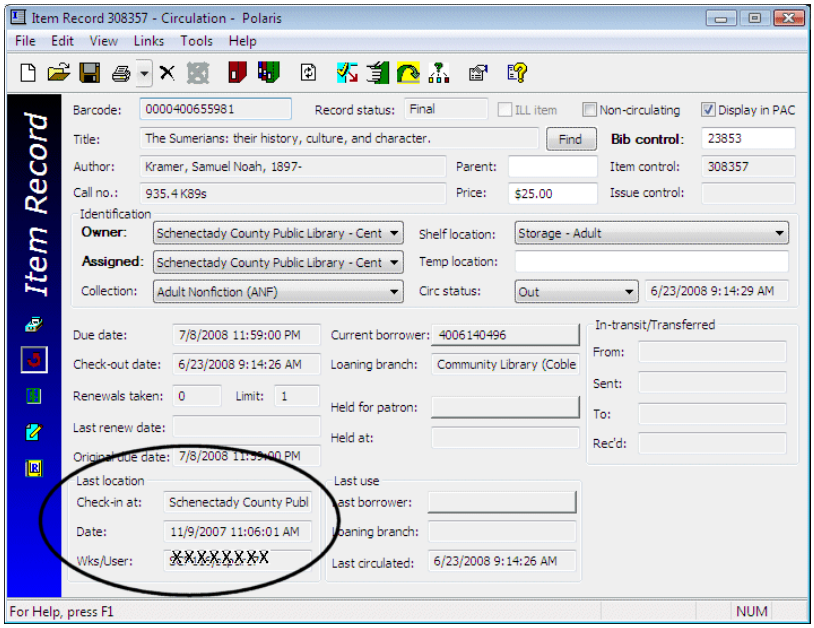

The text of drop-menu options can be edited, and they can be deleted provided they are not used in any patron records. Individual branches can specify which drop-menu UDF options to display, determine the order of display, and designate default values to be used during patron registration, express registration, and online registration from the PAC. You can change existing UDF settings in patron record bulk change.

You can convert free-text UDFs to drop-menu UDFs at upgrade; all the individual free-text entries in the field become options for the drop-menu field, where they can be selected or de-selected for use. (You can also convert a drop-menu UDF to a free-text UDF. The selected drop-menu options in patron records become free-text entries.)

Use the new Patron Services profile **Patron registration user defined fields** at the system level to convert or edit UDFs, and to set new options for existing drop-menu UDFs. (This profile replaces the profiles **Patron registration user defined field 1-5** in previous versions of Polaris.) At the branch level, use the same profile to select the branch options for drop-menu UDFs and specify their display order in the drop-menu list. For detailed information, see "User-Defined Fields in Patron Records" (Patron Services Administration topics) in staff client online Help.

# Last Location Fields for Circulating Items

The information in the last location fields in the Item Record - Circulation view is now retained when the item is checked out. The fields are updated when the item status changes from any status to In.




# Holds on Changed Bibliographic Titles

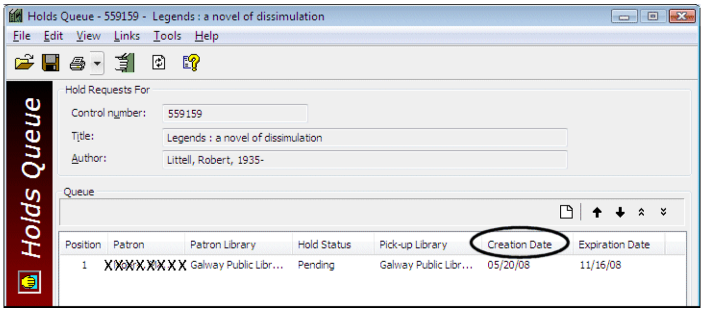
If a bibliographic title is changed after a request is placed, the change is reflected in the Hold Request workform.

# Hold Request Display Note Message

If there is a display note in the hold request workform, the note is now displayed in a separate message after a staff member clicks **Yes** on the fill hold message to trap the item at circulation. The new message is also displayed if the staff member scans a Held item and continues the hold. The staff member clicks **OK** to continue. As in previous versions of Polaris, the note is also printed on the hold slip.

# Holds Queue Displays Request Creation Date

The Holds Queue workform now displays the date a request was created instead of the request's activation date. A request's place in the queue is determined by the request creation date, as in previous versions of Polaris. The display of the activation date was confusing because when a request was reactivated, it returned to the same place in the queue with the new activation date and would appear to be out of order. Also, the Holds Queue workform and the Request Manager workform are now resizable.

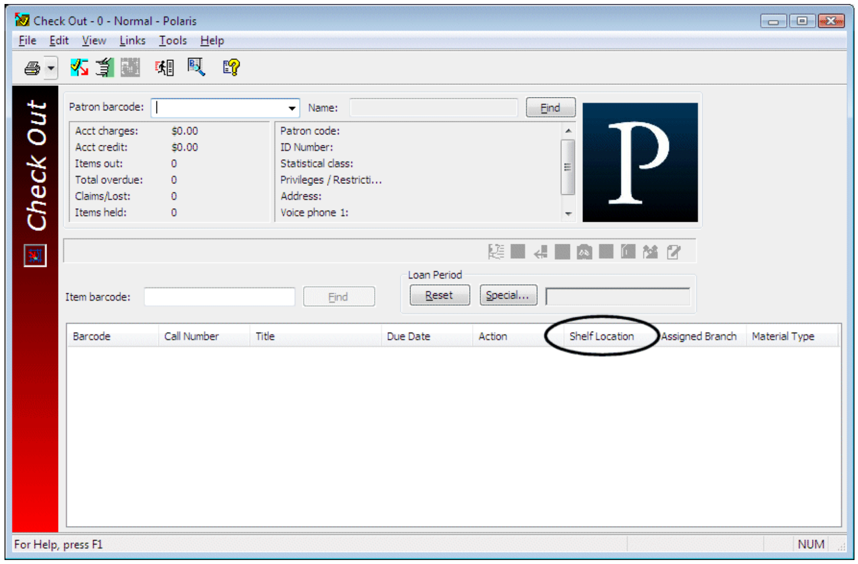


# Printing Items Out from Patron Status Workform

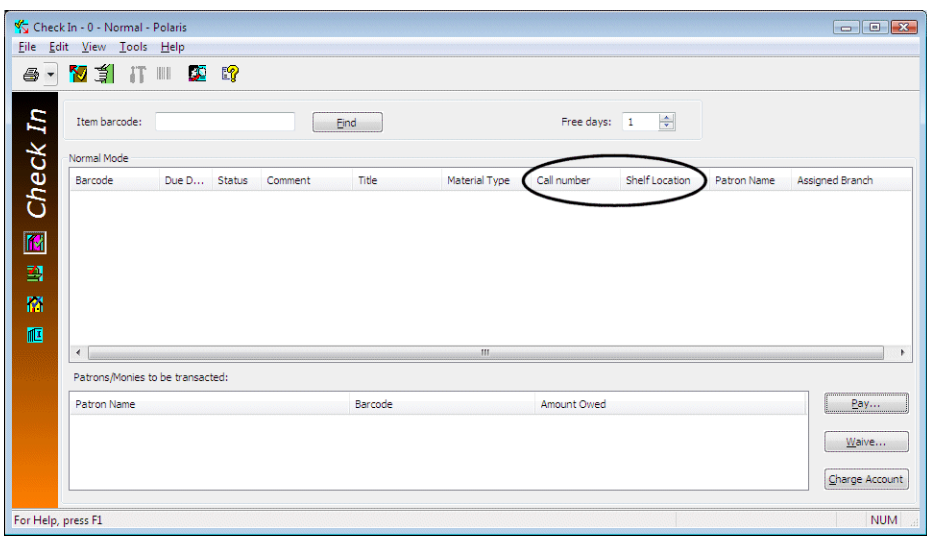
When you print the list of items out from the Patron Status workform - Items Out view on a receipt printer, only the title, material type, and due date are printed. The list is shorter and easier to read.

# Check-Out and Check-In Workform List View Options

Using the Patron Services parameter **Check-out: Listview options**, you can add a **Shelf Location** column to the checked-out items list on the Check-Out workform.

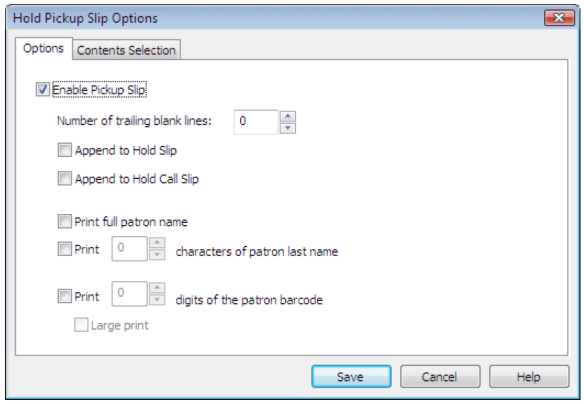



Also, using the Patron Services parameter **Check-in: Listview options**, you can add **Shelf Location** and **Call Number** columns to the checked-in items list on the Check-In workform.



# Hold Pickup Slip - Additional Options

If you use hold pickup slips, you can now choose whether to include the patron's name on the slip, and you can specify the size and number of digits of the patron's barcode. Use the Patron Services parameter **Hold pickup slip options**, Options tabbed page, to set these options.




To specify if and how the patron's name should appear on the slip, select (check) **Print full patron name** to print the entire name in this format: **Smith, John T**. Or select (check) **Print *x* characters of patron last name**, and set the number of characters, to print the name in this format: **Smit, J**. This example prints the first four characters of the last name Smith plus the first initial. If you set the number of characters to 1, only the first character of the last name is printed (no first initial). If you leave both options unchecked, no name appears on the slip.

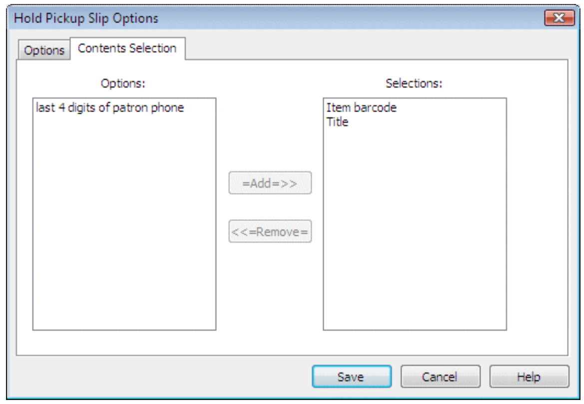
**Note:**
Printer limitations restrict the name to approximately 38 characters, depending on the width of the characters and the printer model. Very long names may be cut off even if you specified the full patron name.

To include a patron barcode on the slip, select (check) **Print x digits of the patron barcode**, and specify the number of digits to print, counting to the left from the last digit of the barcode. If you want to print the barcode in large print, select (check) **Large print**.

**Note:**
If you want the barcode to be the *only* patron identifier, clear the patron name options and set up the barcode options. The barcode will appear at the top of the hold pickup slip.

The order of fields on the printed pickup slip has changed slightly to accommodate this development. The patron name, if selected, is at the top, with the patron barcode on the next line and the pickup date below the barcode.

The title is now an additional option on the hold pickup slip. Use the Patron Services parameter **Hold pickup slip options**, Contents Selection tabbed page, to include or remove the title from the pickup slip information.




The illustration shows an example of a hold pickup slip set to include 5 letters of the patron's last name and 5 digits of the patron barcode. (The pickup date always appears.)


## Optional "Item from Another Branch" Check Out Message

The message **Item is from another branch** is now optional at check out. In Polaris Administration, set the Patron Services parameter **Check-out: warn if item is from another branch** to determine if the message appears.

## Bulk Check In: Prompt for In-Transit

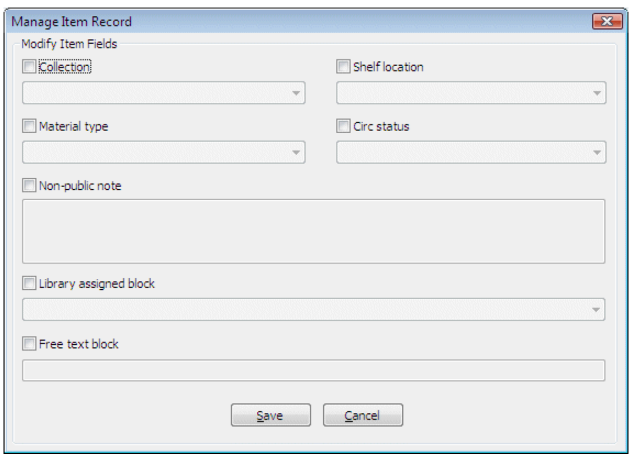
For bulk check-in, a new Patron Services parameter, **Check-in: Prompt for in-transit in bulk mode**, specifies if a prompt appears when an item is checked in at a branch other than the assigned branch. When this parameter is set to **Yes**, the prompt offers the choice of changing the item's status to In-transit to its assigned branch, or changing the item's status to In. If you choose to change the item's status to In, the assigned branch changes to the check-in branch. (The prompt always appears at normal check-in, and the effects are the same.) The default setting is **No**. In this case, items assigned to another branch are automatically given a status of In-transit when checked in. The new parameter is available at the system, library, and branch levels.

As part of this development, the Patron Services parameter **Check-in: Automatic in-transit** has been removed. When this parameter was set to **No**, items assigned to another branch were automatically given a status of In when checked in but the assigned branch was not changed.

# Manage Items From the Check In Workform

The Manage Items feature from the Check In workform has been expanded. In addition to circulation status and shelf location, you can add or change library-assigned and free-text blocks, non-public notes, material types, and collections. **Withdrawn** has been added to the circulation status options. New Circulation permissions (Manage Items Dialogs) apply to the new features; they are available at the system, library, and branch levels and are set to **No** by default.

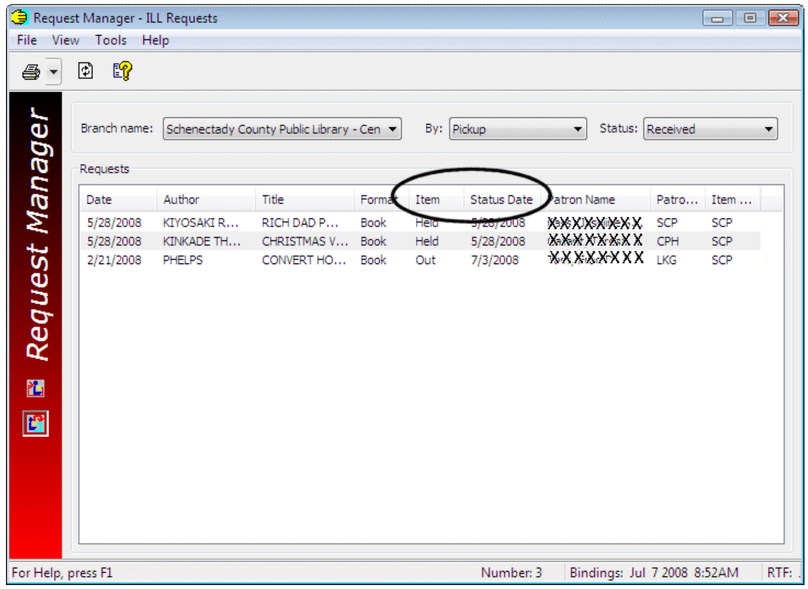
As in previous versions of Polaris, to be eligible for these changes, the item's circulation status must be In, and the item's assigned branch must the same as your workstation's logged-in branch. In the Check In workform listview, select the item or items you need to change. Then select **Tools, Manage Item**, click , or press **CTRL+M.** The Manage Item Record dialog box opens.



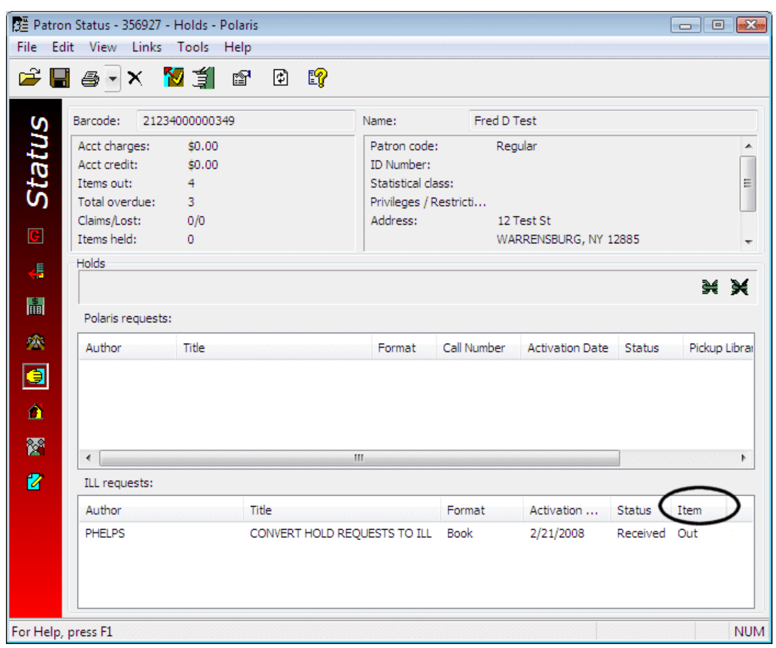

Select the check boxes for the fields you want to change, and select the new options from the lists. (You can type information in the **Non-public note** and **Free text block** fields.) Then click **Save**. The dialog box closes, and the item record is updated with your changes.

# New Columns for Received ILL Items

When you display received ILL items in the Request Manager, two new columns show the circulation status of an attached item and the date the status was assigned.




An item column for ILL has also been added to the Requests view of the Patron Status workform. The column shows the circulation status of a linked item.



# Office Address Added to Patron Bulk Change Selections

The address selection **Office** has been added to the address lists on the Address tab of the Patron Bulk Change dialog box.

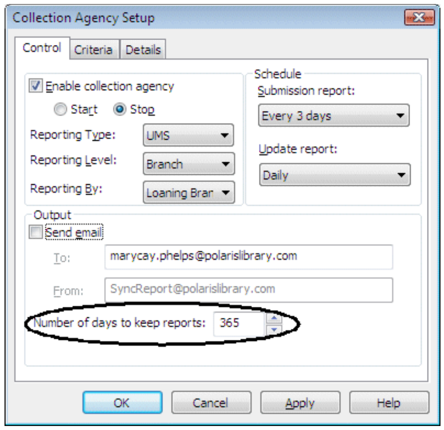
# Deleted Item Record Information Retained

The item record identification (title and barcode) is still available in the PatronAccount table after the item has been deleted, so charge and pay/waive transactions now remain related to the item even after it is deleted. The Transaction Summary listing these transactions, which appears when you click  on the Patron Status workform - Account view, is now resizable.

# Collection Agency Reporting Improved

The following changes have been made to collection agency reporting:

- ❑ You can now report by loaning branch instead of patron branch or item branch. Set this **Reporting By** option with the Patron Services parameter **Collection agency options** (system level).
- ❑ As in previous versions of Polaris, if you change the **Reporting Level** or **Reporting By** options, the collection agency block is removed from all currently reported patrons. In Polaris 3.5, a message warns you about this situation. If you proceed, remember to run the SQL job **Polaris_CollectionSynchronization** to update the blocks. In this situation it is also possible for a patron to be charged another collection fee.
- ❑ The item's assigned branch, the patron's registered branch, and the loaning branch are now stored with charge, pay and waive transactions to improve collection agency reporting when floating collections are used.
- ❑ The item's assigned branch and the patron's registered branch information are now stored in the PatronAccount table for use by collection agency reports. If an item record is deleted, for example, the information is still available in the PatronAccount table for accurate reporting.
- ❑ The Collection Summary, which opens when you click  on the Patron Status workform - Account view, is now resizable.
- ❑ Collection agency reports are automatically saved on the server at **ProgramData\Polaris\[version]\Logs\SSIS\CollectionAgency\Reports\[Branch Abbreviation]**
  It is no longer possible to change the file location, but using a new option on the Collection Agency Setup dialog box, you can specify how long the reports should be retained. (Log files are stored in the same location but are automatically deleted after 10 events).




## Outreach Services Reports Added

New Outreach Services reports are available. To access these reports, select **Utilities, Reports and Notices** from the Polaris Shortcut bar, and select **Public Services, Patron Services, Outreach Services** in the Polaris Reports dialog box:

- **All ORS Patrons** - This report lists all enabled ORS patrons (active and inactive), grouped by branch. It includes the patron's name, ORS status, notes, last service date, next delivery date, route, and mode of delivery. You can filter the report by patron's branch.
- **Item Circulation Statistics for ORS** - This report shows the number of items checked out to ORS patrons within a specified time period. Items are grouped by material type and organization. The report includes the number of items by material type, checkouts, renewals, and total transactions. You can filter the report by branch.
- **Patron Circulation Statistics for ORS** - This report lists the number of items checked out and renewed to ORS patrons, grouped by patron code, within a specified time period. You can filter the report by branch.

## Patron Cross Borrowing Report Improved

The Patron Cross Borrowing report now has a defined sort order. The primary sorting order is by transacting library name, the secondary sorting order is by patron library name, and the tertiary sorting order is by the number of circulations from highest to lowest.

## In-Transit Message Includes Branch Abbreviation

The in-transit message now includes the branch abbreviation as well as the branch name. The Comment column on the Check In workform also includes the branch abbreviation for items that have gone in transit.

# New Options for Self Check Material Types

Two new options have been added to the Self Check Material Types policy table:

- **Double Sided** - If your self-check units use electromagnetic (EM) security, set this option to **Yes** for materials where both spine and main EM magnets should be used when desensitizing an item.
- **Unlocker** - Applies only to Polaris ExpressCheck clients running on ITG workstations with audio-visual security lockers. Set this option to **Yes** for material types where the AV locker should unlock when the material is successfully checked out. See "Polaris ExpressCheck and ITG" on page 82.

For more information about self-check material types, see "Setting Up SIP Self-Check Circulation" in the *Patron Services Administration Guide* or staff client online Help.

# Title Included in Class POS Information

Polaris now sends the title associated with a charge along with the patron's barcode to the Class POS application.

# Polaris PAC Applications

Polaris 3.5 includes the following improvements in Polaris PAC applications.

## Search Results Subsorted by Title

Polaris PowerPAC

You can set a new PowerPAC profile, **Search: Sub-sort-by-title** to **Yes** to have PowerPAC search results for most types of searches secondarily sorted by title. This allows patrons to quickly find a known title in a large results set. The profile is available on the system, library, and branch levels. It is set to **No** by default; you may want to leave this setting to preserve former behavior for patrons or if you find the automatic subsort impacts performance.

When the profile is set to **Yes**, for covered search types and sort types after the list of results is ordered by the selected or default sort, the records are then sorted alphabetically by title, ignoring nonfiling characters (respecting the value of the 245 second indicator). However, the setting does not cover the following search and sort types:

- Any browse search
- Any multi-database search
- The following sort types: relevance, most popular, title, author then title, title then author, title then publication date, title then format, publication date then title, call number then title

## Searching with Diacritics and Vernacular Script

Polaris PowerPAC
Polaris ActivePAC

You can now search using non-Roman characters. If you do a keyword search using a vernacular script, Polaris returns records with the vernacular script in the 880 tag, if the subfield $6 links to an indexed tag, such as the 245 tag. You can enter the vernacular script in the keyword title search, and the search results display the transliterated title from the 245 tag in the Brief and Full displays. The illustration shows an example from Polaris PowerPAC.

**Note:**
The Librarian’s View displays the MARC record with the vernacular script in the 880 tags.

For more information, see “Enter and Search for Diacritics and Special Characters” on page 35.


## Changes to New Titles List

**Polaris PowerPAC**
**Polaris ActivePAC**

When the PAC is connected at the branch level, the patron sees only new titles for that branch. When the PAC is connected at the system level, the patron sees new titles for the whole system.

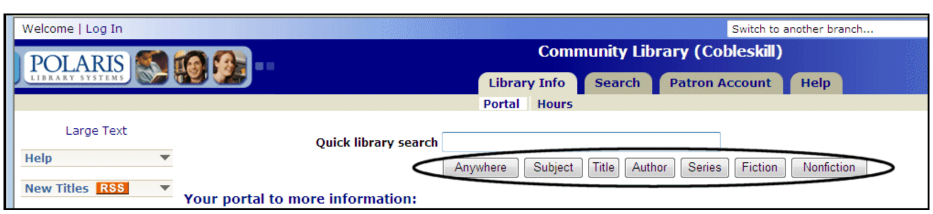
Polaris 3.5 includes new types of material (see "New Types of Material Codes" on page 33. They are categorized in the New Titles list as follows:

- Blu-ray Disc - New Videos
- Audio Ebook - New Sound Recordings
- Book+Cassette - New Books, New Sound Recordings
- Book+CD - New Books, New Sound Recordings

## Fiction and Nonfiction Quick Search Buttons

**Polaris PowerPAC**

If you display the quick search option with buttons, you can now include **Fiction** and **Nonfiction** quick search buttons similar to Children's PAC functionality. These launch keyword searches for the quick search term, scoped by fiction or nonfiction.

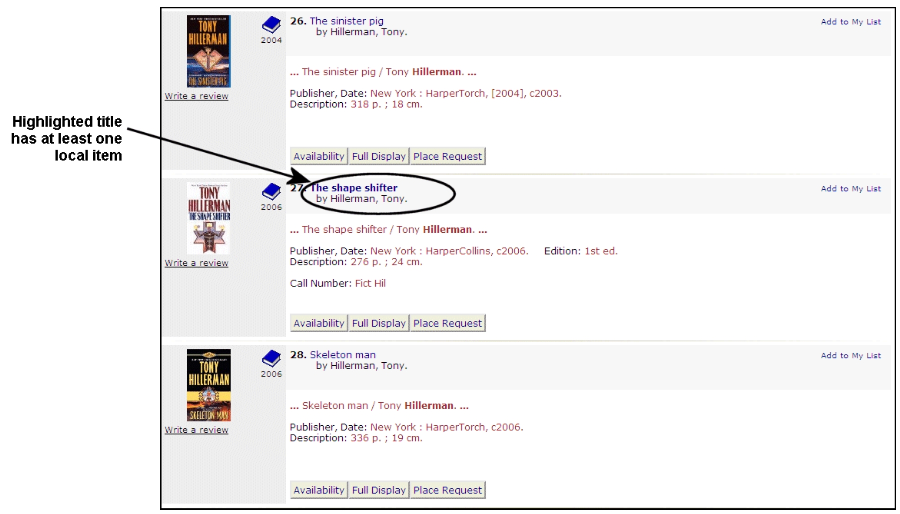


Like the other quick search buttons, you use the PowerPAC profile **Quick search button configuration** to set **Fiction** and **Nonfiction** for display. The profile is available at the system, library, and branch levels. For detailed information, see "Customizing Portal Page Features" (Public Access Administration topics) in staff client online Help.

# Titles with Local Items Highlighted in Search Results

**Polaris PowerPAC**

In Polaris PowerPAC search results, you can now choose to highlight titles that have at least one local item attached. The items considered to be local are based on the connection organization's settings in the Item Availability Display Order policy table.




**Note:**
If the connection organization is the system, or if only one local organization is defined for the connection organization, no titles are highlighted.

A new PowerPAC profile, **Highlight local items in matching title view**, controls whether these titles are highlighted. The profile is available at the system, library, and branch levels. The default setting is **No** (do not highlight).

# Suppressing Search Terms for Searches Launched from Links

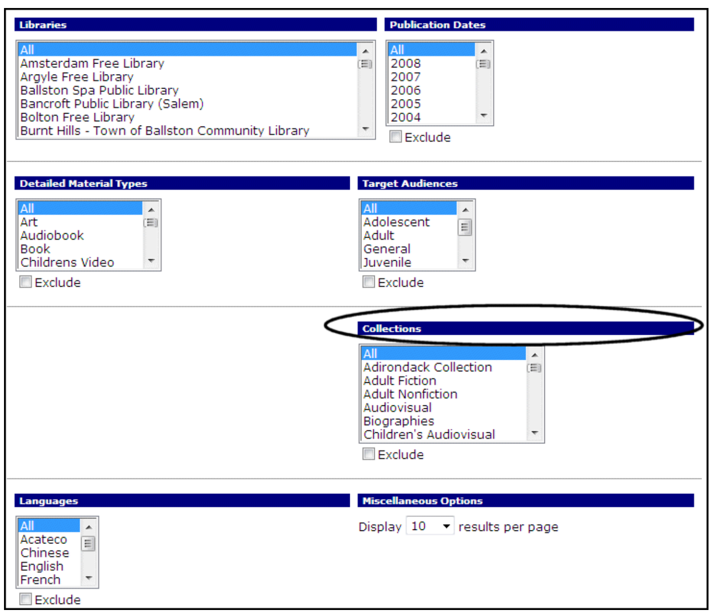
**Polaris PowerPAC**

In previous versions of Polaris, search terms were always displayed in the search box when a search was launched from a link (such as an item in the **New Titles** list). This could be confusing when the system used a behind-the-scenes search term such as a record control number. A new PowerPAC profile, **Search: Display search criteria in search box for link-produced searches**, controls whether search terms are displayed in the search box in these circumstances. The profile, available at the system, library, and branch levels, is set to **No** by default. In this case, only terms actually typed by the user are displayed in the search box. The profile controls the display only; the actual search behavior has not changed.

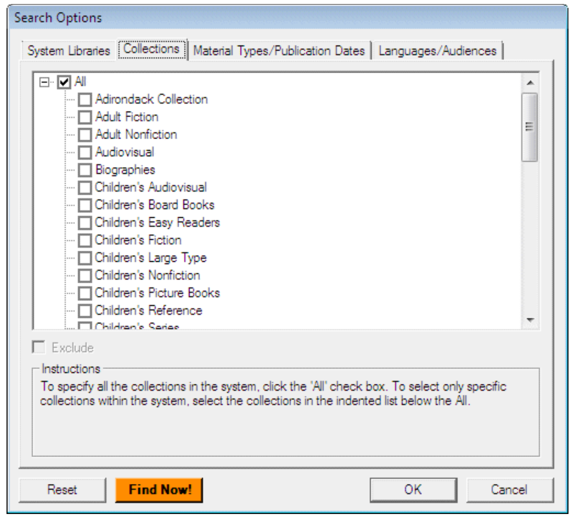
# Scoping Searches by Collection

**Polaris PowerPAC**
**Polaris ActivePAC**

To offer an option to scope searches by collection, set the new PAC profile **Search options: Limit by collection enabled** to **Yes**. This setting places the option on the Search Options and Advanced search pages of Polaris PowerPAC.



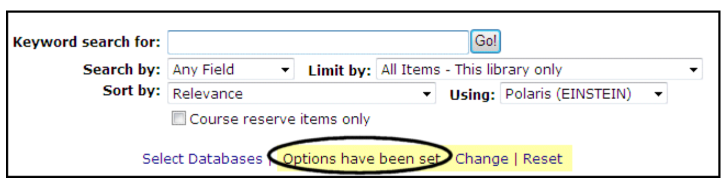

In ActivePAC, the option appears on a new Search Options tabbed page as well as the Advanced search page.




## Search Options Indicator More Prominent

**Polaris PowerPAC**

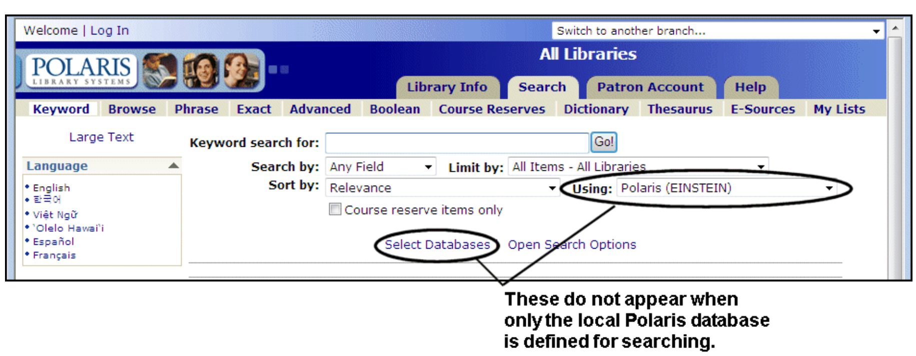
The message that indicates search options have been set is now displayed more prominently in the Polaris PowerPAC search bar. In previous versions of Polaris, the message was easily overlooked and therefore search results might have been unintentionally limited. The illustration shows the new message.




## Using Drop-Down and Search Databases Link Suppressed

**Polaris PowerPAC**

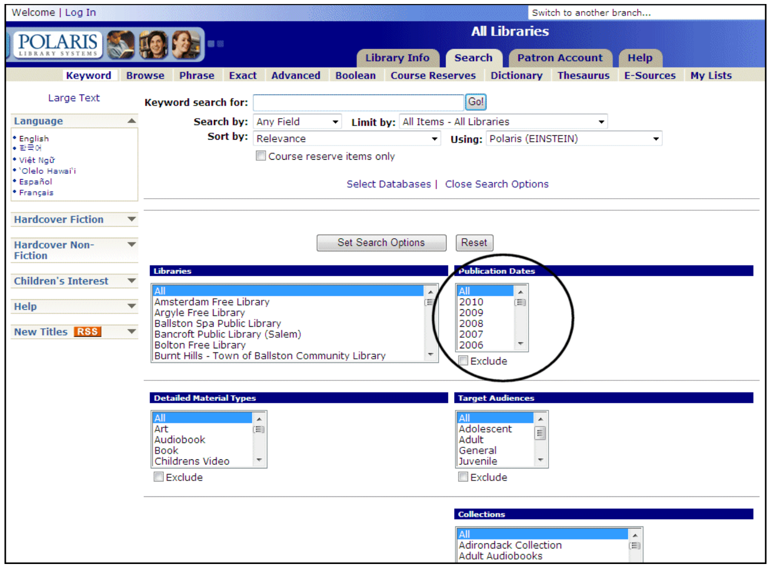
The **Using** label and drop-down list and the **Search Databases** link no longer appear in Polaris PowerPAC if the connection organization has targeted only the local Polaris database for searching.



# Next Year Publication Date Available as Search Option

**Polaris PowerPAC**

The year after the current year is automatically available as a publication date option in the Search Options list.



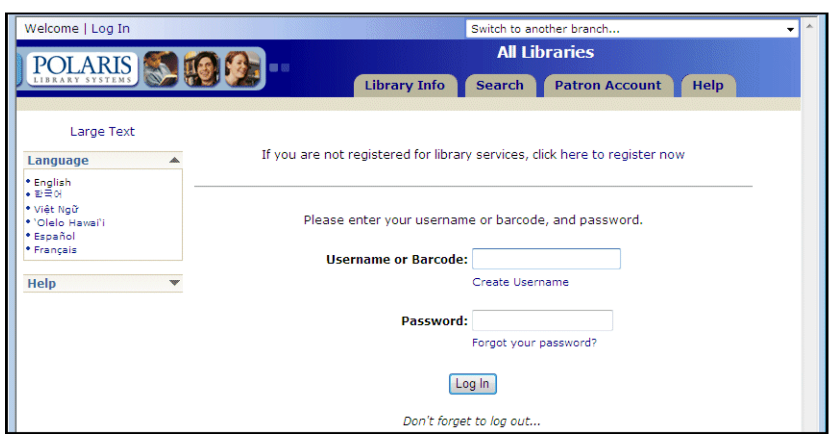

**Note:**

This feature was also added to Polaris version 3.4.198 and later.

# Patron User Names, Forgotten and Numeric Passwords

**Polaris PowerPAC**
**Polaris ActivePAC**

In Polaris 3.5, you can allow patrons to set up a user name online, and change it online if necessary. A patron can enter her user name instead of a barcode when logging in to use PAC functions such as viewing the patron account or placing a hold request.



The user name is displayed in the patron account in PAC, and the patron barcode is masked to display only the last four digits.


**Note:**
The user name will not be accepted for logging in to third-party self-service devices (devices that rely on SIP or SIP2).

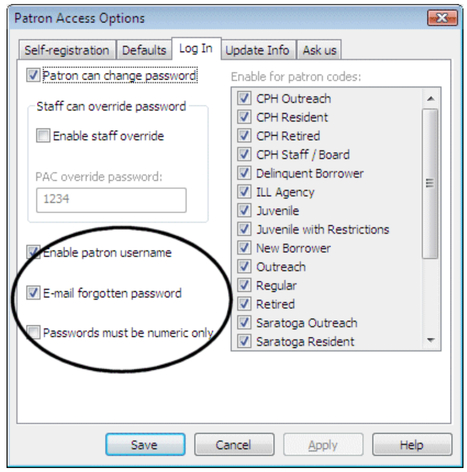
Patron user names are not available to staff. Staff cannot assign them during patron registration, they are not searchable or available for reports, and they are not displayed in the patron record. Only patrons can create or change user names.

You can also allow patrons to have forgotten passwords sent to their e-mail addresses. When this option is set, the PAC log-in page includes a **Forgot your password?** link. When the patron clicks the link, an e-mail message containing the patron password is sent to both the primary and alternate e-mail addresses in the patron record. If no e-mail address is present in the patron record, the system displays an error message.

**Note:**
If the patron has forgotten both user name and password, the patron must contact the library. Staff can assign a new password. Using this and the barcode, the patron can set up a new user name.

Finally, you can choose to require numeric passwords (PINs). This option is useful if you use Polaris Phone Attendant and allow patrons to log in by telephone to hear information about their accounts. If you choose to enable this option, existing alphanumeric passwords will continue to work but only numeric passwords are accepted when a new account is created or when a patron password is changed from the staff client or from PAC.

You set these options with the PAC profile **Patron Access options**. The **Password** tab is now labeled **Log In** to describe the new options more accurately.



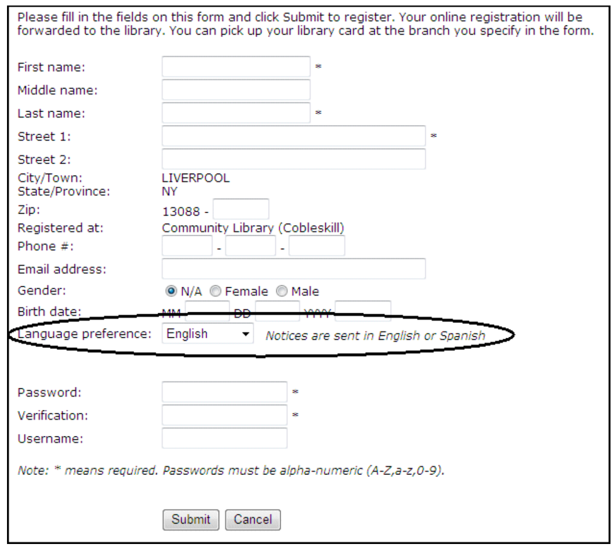

**Enable patron username** and **E-mail forgotten password** are available at the system level only. **Passwords must be numeric only** is available at the system, library, and branch levels. All three are inactive (unchecked) by default.

**Note:**
Polaris ExpressCheck also supports patron user names and e-mail for forgotten passwords. See "User Names and Forgotten Passwords - ExpressCheck" on page 81.

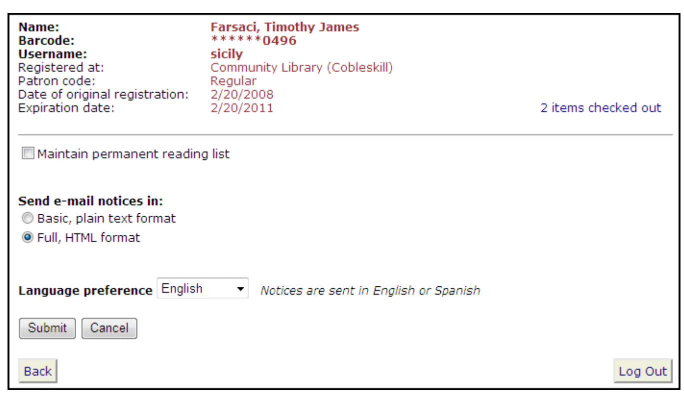
# Preferred Language for Notices

**Polaris PowerPAC**
**Polaris ActivePAC**

If you have the appropriate language licenses for PAC, and you have enabled multilingual notices in Polaris Administration (see “Multilingual Notices” on page 43), patrons can indicate a preferred language for notification when they register from the PAC. The illustration shows the registration page.



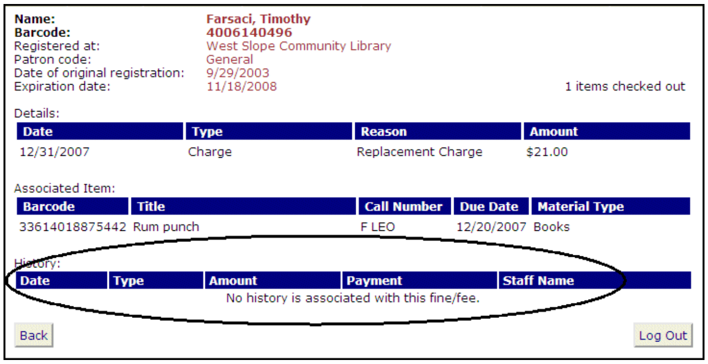

The language preference can also be changed from the PAC patron account pages. The patron logs in and clicks **Change Preferences** on the patron account My Record page. The preferences page displays the preferred language option.



# Suppressing Fines & Fees History in PAC

**Polaris PowerPAC**
**Polaris ActivePAC**

As in previous versions of Polaris, patrons can select an information icon to see detailed information about an individual fine or fee. The history section of the details page includes the date, type, amount, payment, and staff name associated with the fine or fee. If you prefer to suppress the history section, set the new PAC profile **Fines & Fees: Show history in detailed view** to **No** (the default setting is **Yes**). The setting for the patron’s registered branch controls the display.




# Charging for Hold Requests in Children’s PAC

**Polaris PowerPAC Children’s Edition**

If your system charges for hold requests, you can now allow patrons to place hold requests from Polaris PowerPAC Children’s Edition. If you want the charge to apply to hold requests from Polaris PowerPAC Children’s Edition, set the new Children’s PAC profile **Allow hold requests if charging for holds** to **Yes**. When the patron places the hold request, a message displays any information you set, including the charge. The patron can choose to place the request or cancel it.


The profile is available at the system, library, and branch levels; the default setting is **No**. If you choose to charge a fee for hold requests and you leave the Children's PAC profile set to **No**, hold requests cannot be placed in Polaris PowerPAC Children's Edition.

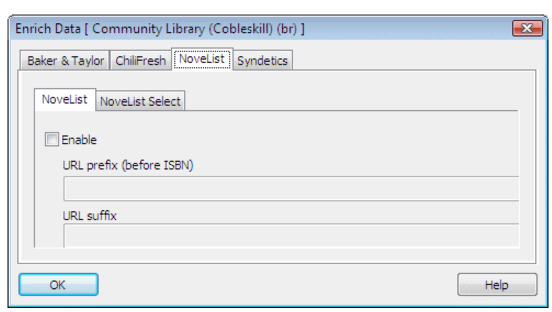
As in previous versions of Polaris, you set a charge for hold requests and specify the accompanying message at the system level with the Request parameter **Holds options**.

**Note:**
This change was also included in Polaris 3.4, build 194 or later.

# NoveList Select Changes

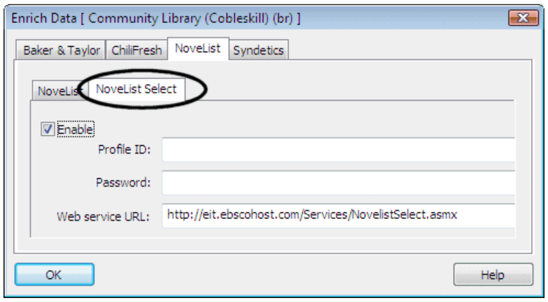
**Polaris PowerPAC**
**Polaris ActivePAC**

If your contract with EBSCO includes NoveList Select (**Find more like this** link in Polaris PowerPAC, Similar Titles tab in ActivePAC), be aware that the setup in Polaris Administration has changed to accommodate a new Web service from EBSCOHost. In the **Enrich Data** PAC profile for the organization, click the **NoveList** tab.



**Tip:**
This change was also included in Polaris 3.4, build 199 or later.

Then click the new **NoveList Select** tab.




Select (check) **Enable**. Then type your Profile ID and password in the appropriate boxes. The last part of of the Profile ID is always **.main.eitws**. Contact Ebsco NoveList to obtain the unique first part of the Profile ID and your password. The Web service URL is the same for all Polaris customers, and you do not need to change it unless the NoveList Web service URL changes.

## Editing Multiple PowerPAC Language Strings

**Polaris PowerPAC**
**Polaris PowerPAC Children's Edition**

Language strings are now part of the database and no longer reside in .xml files. They are easily edited for any licensed language using the Polaris Language Editor. You can also import existing .xml strings into the Language Editor. See "Polaris Language Editor" on page 84.

## Securing the Entire PowerPAC Site (https)

**Polaris PowerPAC**

You can now use Secure Socket Layer (SSL) to secure the entire PowerPAC site, not just patron information. However, if you use content from third-party vendors, be aware that your patrons may receive messages about allowing unsecured content. If you think the messages will be a problem, contact your vendors to see if they can use https. (If so, you will need to change their Enriched Data URL settings from **http** to **https**. See "Enabling Enriched Data" in the *Polaris Public Access Administration Guide 3.5* or staff client online Help). For more information about Secure Socket Layer, see "Setting Web server Parameters" in the *Polaris Public Access Administration Guide 3.5* or staff client online Help.

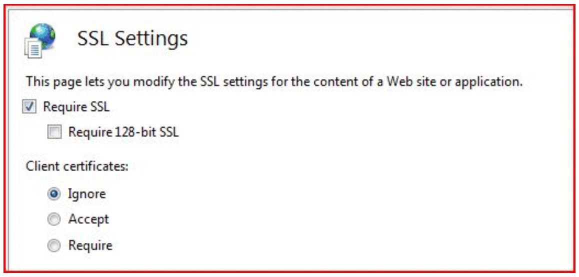
**Note:**
This change was also applied to Polaris 3.4 build 198 and later.

Follow these steps to set up the entire PowerPAC site to use https.

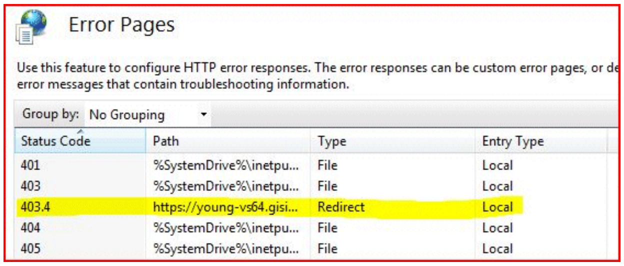
1. Install an SSL Certificate on the web server.
2. In Polaris Administration, set the Web server PAC parameter **SSL: Enable** to **Yes.**

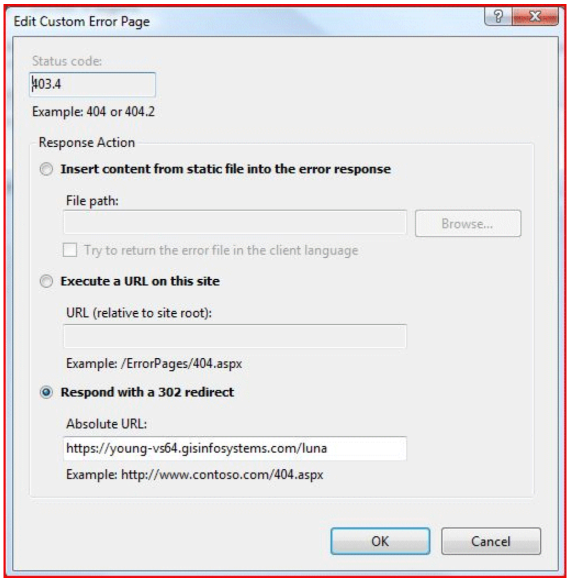
3. In Polaris Administration, change the Web server PAC parameter **URL of the PowerPAC's root** to begin with **https** instead of **http**.

4. Using the IIS Manager on the Web server, change the SSL Settings at the root of the Polaris Web application to **Require SSL**.

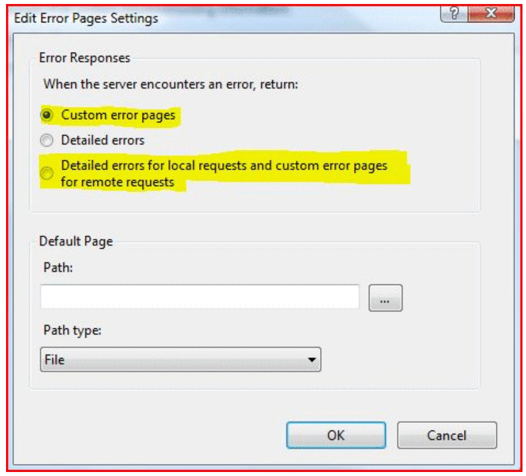



5. Using the IIS Manager, set up a custom error page for a status code of 403.4 that will redirect the browser to the secure version of the PAC.




6. Using the IIS Manager, edit the Feature Settings to use either **Custom error pages** or **Detailed errors for local requests and custom error pages for remote requests.**




# External Log-On to Patron Account

The feature that allows patrons to log on to the main patron account page in the PAC from an external page has been enhanced. For security reasons, the POST method is now used instead of the GET method, and the feature also supports both user names and patron barcodes, as well as requiring the patron password. If there is a problem with these entries, a PowerPAC error message is displayed and the patron is returned to the normal PowerPAC log-on screen.

The previous method of passing in the barcode and password on the logon.aspx page URL is no longer supported. The following is an example of the old method:

**http://mylibrary.com/polaris/logon.aspx?barcode=1234567890&password=1234**

The new POST method for external log-on uses the page **logon_ext.aspx**. The two form values supported are **userid**, which can be either the patron account barcode or user name, and **password**, which is the patron's password. The following example HTML page shows how to include a log-on feature on an external page:

```
<html>
      <body>
        <form method="post" action="http://mylibrary.com/polaris/logon_ext.aspx">
           Barcode or Username:<br />
           <input type="text" id="userid" name="userid"/><br />
           Password:<br />
           <input type="password" id="password" name="password"/><br />
           <input type="submit" value="Log In" />
        </form>
      </body>
   </html>
```

# Polaris ExpressCheck

Polaris 3.5 includes the following changes to Polaris ExpressCheck.

## User Names and Forgotten Passwords - ExpressCheck

Polaris 3.4 introduced the ability to display an on-screen keyboard in Polaris ExpressCheck where patrons can manually enter a barcode. In Polaris 3.5, if you enable this keyboard option, patrons can enter a user name instead of a barcode to log on. You can also display a **Forget password?** link on the manual logon screen that the patron can click to receive an e-mail message containing the forgotten password. (The manual logon screen now requires a password as well as either a barcode or user name.) These features are controlled by the PAC profile **Patron Access options.** For more information, see "Patron User Names, Forgotten and Numeric Passwords" on page 72.

## Interface Improvements

At the suggestion of Polaris customers, several improvements have been made to the Polaris ExpressCheck interface:

- ❑ As the patron checks out items, the last item checked out is always visible in the list.
- ❑ Using the ExpressCheck's **EC_interface.xml** file, you can specify which tabbed page is displayed when the Patron Account is opened. Under the **patronaccount** form element, set the **initialtab** element to an index value from 0-3 as follows:
    - 0 - My Account page
    - 1 - Items Out page
    - 2 - Requests page
    - 3 - Fines & Fees page
- ❑ The Items Out page now includes a Renew All feature. When this feature is selected, the system selects all the items and attempts to renew them. A new Renew Summary page shows the patron which items have been successfully renewed.
- ❑ A new Suspend/Reactivate Summary page provides feedback to the patron who has suspended or reactivated hold requests using the Requests page in the Patron Account.

# Block Items by Material Type

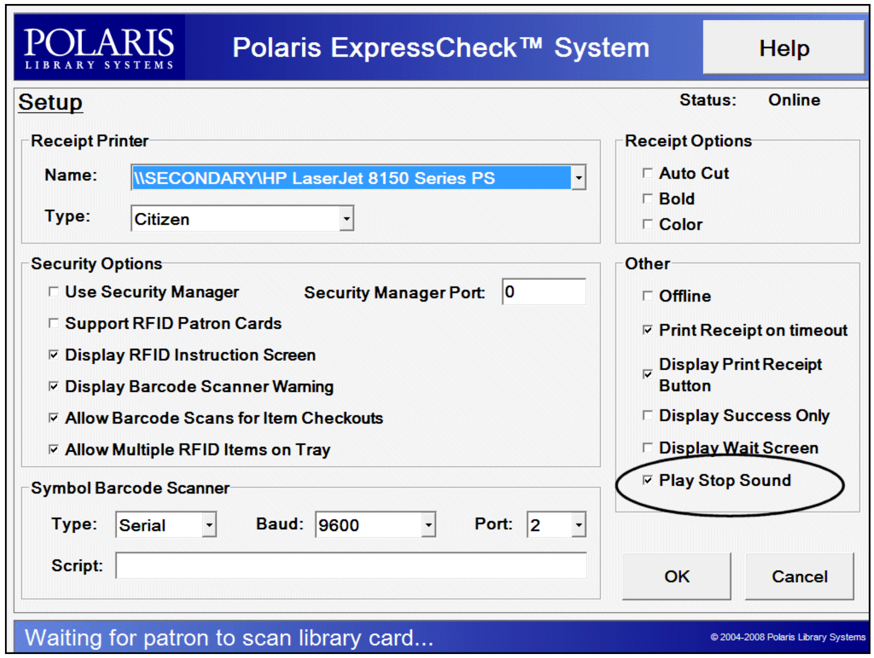
You can now block specific material types from being checked out at Polaris ExpressCheck workstations. For example, you can allow patrons to check out books but not DVDs. In Polaris Administration, open the SelfCheck Material Types policy table for the organization and for each material type you want to block, set the **Is Blocked** column to **Yes**.

# Polaris ExpressCheck and ITG

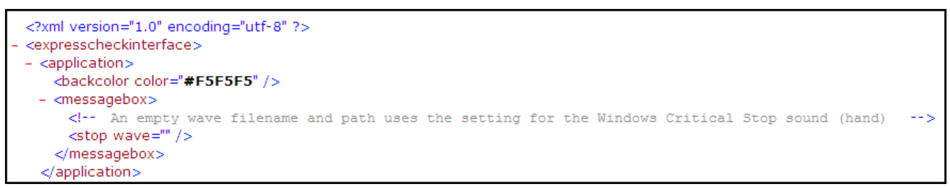
Polaris ExpressCheck 3.5 can be installed and run on ITG hardware. Polaris ExpressCheck supports ITG's RFID, electromagnetic (EM) and Audio/Visual Locker security options. You select these options during Polaris ExpressCheck client software installation. As part of this development, the SelfCheck Material Types policy table settings **Is Magnetic**, **Can Desensitize**, and **Double Sided** apply to Polaris ExpressCheck checkouts on ITG hardware with EM security. The SelfCheck Material Types policy table setting **Unlocker** applies to Polaris ExpressCheck checkouts on ITG hardware equipped with an AV Security Locker. For more information about self-check material types, see "Setting Up SIP Self-Check Circulation" in the *Patron Services Administration Guide* or staff client online Help. For more information about installing Polaris ExpressCheck, see your *Polaris ExpressCheck Administration Guide*. You can also change certain ITG-related settings with Polaris Security Manager. See "Security Manager" on page 9.

# Stop Sound

When a "stop" message appears, for example when a patron attempts to check out an item that does not circulate, a stop sound .wav file is now played. (On Windows Vista workstations, the file is the default Critical Stop sound.) The sound is played by default, but you can turn it off by unchecking the **Play Stop Sound** option on the Polaris ExpressCheck Setup screen. Press **CTRL+ALT+S** to access the Setup screen. For more information, see your *Polaris ExpressCheck Administration Guide*.




If you want to play your own sound, you can edit the **EC_interface.xml** file located in **C:\ProgramData\Polaris\3.5\Templates\Config**. A new **message\stop** node has been added under the **application** node.



```
<?xml version="1.0" encoding="utf-8" ?>
- <expresscheckinterface>
- <application>
    <backcolor color="#F5F5F5" />
  - <messagebox>
      <!-- An empty wave filename and path uses the setting for the Windows Critical Stop sound (hand) -->
      <stop wave="" />
    </messagebox>
  </application>
```

If your custom .wav file for the sound is not in the **C:\Program Files\Polaris\3.5\Bin** folder, you must enter the full path. For more information about editing the **EC_interface.xml** file. see your *Polaris ExpressCheck Administration Guide*.

# Editing Multiple ExpressCheck Language Strings

Language strings are now part of the database and no longer reside in .xml files. They are easily edited for any licensed language using the Polaris Language Editor. See "Polaris Language Editor" on page 84.

# Polaris Language Editor

The new Polaris Language Editor is a Web-based tool you use to customize English and other licensed language strings in all the parts of Polaris that support multiple languages, including Polaris PowerPAC, Polaris ExpressCheck, printed and e-mail notices, telephone notices, and Polaris Phone Attendant (inbound telephony). You can compare, add, edit and distribute language strings easily, without editing individual files. The strings are now part of the database and no longer reside in .xml files.

You can add or customize language strings at the system, library, and branch levels. Branch settings override library settings; settings made at the library level override system-level settings.

Polaris Language Editor also provides additional tools specifically for Polaris PowerPAC, including a language string identifier and a tool to clear the Polaris PowerPAC cache and reload PowerPAC pages, which you must do after you edit language strings.

For security purposes, the Language Editor should be installed on a server to which there is no outside access, but which has access to the Polaris database—for example, the Web portion of the Polaris application server. Because the Language Editor uses domain accounts, you should use a Secure Socket Layer Certificate. You can issue your own or purchase domain-level or individual server certificates from third-party vendors. Contact your Polaris Technical Support representative for assistance.

You can access and use the Language Editor with most browsers, including Internet Explorer 6, 7, or 8, Firefox, Safari, and Opera. You need the Polaris permission **WebAdmin access: Allow** to use the Language Editor. In Polaris Administration, this permission is available at the system level under the System Administration security node.

To access the Language Editor, open your browser and navigate to the site where the Language Editor is installed (in most cases **http://[localhost]/webadmin**.). You must supply your Polaris username, password, and domain to log in to the Language Editor. For detailed information about using the Language Editor, select the Language Editor **Help** tab.

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